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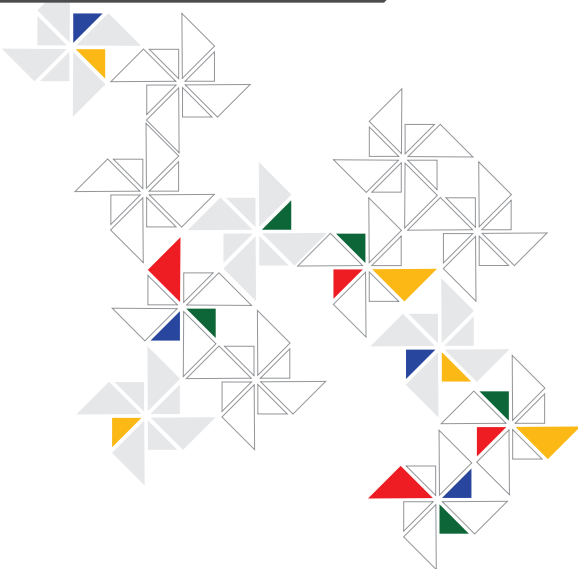


Workplace  
**Diversity  
Management**

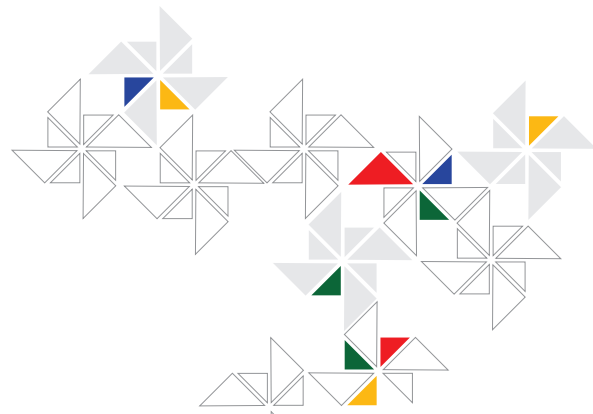
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**Module Three**

**Diversity and Inclusion Strategic Planning**



2018





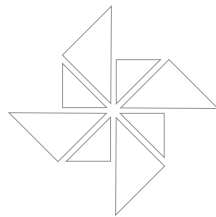


# Workplace Diversity Management



Module Three

## Diversity and Inclusion Strategic Planning










2018



# Contents

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## About This Manual

 Who is the Training Program Intended for? .....	5
 Overall Objective.....	5
 Learning Objectives .....	5
 The Workplace Diversity Management Training Program at a Glance.....	7
 How to Use This Manual.....	8
 The USAID LENS Project .....	8
 Acknowledgments .....	8

## 1. Strategic planning in Small Organizations

## 2. Developing a Diversity and Inclusion Strategic Plan

2.1 Preparing to Start.....	17
2.2 Establishing a Diversity Task Force.....	18
2.3 Conducting a Diversity Audit.....	19
2.3.1 Demographic Profile .....	19
2.3.2 Employee Survey .....	20
2.3.3 Analysis of Organizational Policies, Systems, and Practices.....	22
2.3.4 SWOT Analysis .....	23
2.3.5 The Diversity Audit Report.....	24
2.4 Developing a Diversity and Inclusion Strategic Plan.....	25
2.5 Implementing the Diversity and Inclusion Strategic Plan.....	30
2.6 Monitoring and Evaluation.....	31

## **Annexes**

Annex 1: Diversity Task Force Charter .....	35
Annex 2: A Summary Guide for Preparing a Workforce Demographic Profile .....	36
Annex 3: Employee Opinion Survey .....	39
Annex 4: SWOT Analysis .....	46
Annex 5: Diversity and Inclusion Strategic Plan Template.....	47
Annex 6: Complete Case Studies .....	50

<b>Sources</b> .....	<b>52</b>
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## About This Manual

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This manual is part of a three-module training package on Workplace Diversity Management which aims to enable small enterprises to adopt strategies to attract, retain, and manage a diverse workforce and to create enabling business environments and inclusive cultures.

### **Who is the Training Program Intended for?**

The Workplace Diversity Management training program targets small enterprises throughout Jordan and is intended for the use of general managers, line managers, and HR practitioners within those enterprises.

The program is implemented through Business Support Providers (BSPs) that normally target small enterprises with their service offerings. BSPs are encouraged to apply the principles and best practices of diversity management within their own organizations, and to offer the training program as part of their services.

In addition, this training program can be useful to a broader audience of organizations, consultants, and trainers interested in workplace diversity management.

### **Overall Objective**

The Workplace Diversity Management training program aims to enhance the competitiveness and sustainability of small enterprises by enabling them to acquire the necessary knowledge and competencies for adopting diversity strategies and creating enabling work environments and inclusive organizational cultures.

### **Learning Objectives**

**Module One:** The first module of the training program aims to develop the knowledge of small businesses in workplace diversity management by introducing them to the main concepts of workplace diversity, discussing both its benefits and challenges. Businesses will also explore a number of frameworks that seek to define the drivers, scope, and outcomes of diversity management.

By the end of the training, participating businesses will be able to:

- Explain the concepts of workplace diversity.
- Dispel common misconceptions about diversity in the workplace.

- Identify the benefits that a diverse workforce brings to the organization.
- Identify the challenges of workplace diversity and their implications for people management approaches and practices.
- Define workplace diversity management.
- Describe factors – at the macro, meso and micro levels – that impact diversity management decisions and practices.
- Describe different HR management approaches for managing workplace diversity.
- Explain how inclusion is created and practiced within an organization.

**Module 2:** The second module of the training program includes practical guidelines to help organizations integrate diversity and inclusion into organizational processes and practices.

By the end of the training, participating businesses will be able to:

- Explain why having formal HR management policies, procedures and systems is crucial for the success of diversity and inclusion initiatives.
- Identify the main diversity and inclusion policies to develop.
- Describe ways to improve recruitment and selection, compensation, and career advancement practices to achieve diversity and inclusion.
- Identify steps for implementing diversity marketing and supplier diversity.
- Explain approaches for managing organizational change.
- Explain the importance of maintaining data on diversity and inclusion activities and initiatives.
- Identify business practices that can contribute to the success of diversity and inclusion initiatives within their enterprises.

**Module 3:** The third module of the training program aims to develop the skills required for planning and implementing effective diversity and inclusion initiatives. It provides a step-by-step approach to strategic planning and a number of related sample templates.

By the end of the training, participating businesses will be able to:

- Describe the phases of the diversity strategic planning process.
- Identify the elements of a diversity audit and the implementation mechanism for each element.
- Identify the components of a diversity and inclusion strategic plan.
- Develop diversity and inclusion goals, objectives, strategies, activities, and indicators.
- Describe the components of an action plan.
- Explain the purpose of monitoring and evaluation.



## Module 1: Concepts and Rationale

### 1. Understanding Workplace Diversity

- 1.1 Diversity Dimensions
- 1.2 Misconceptions about Workplace Diversity
- 1.3 The Benefits of a Diverse Workforce
- 1.4 The Challenges of Workplace Diversity
  - 1.4.1 Bias and Discrimination
  - 1.4.2 Team Cohesiveness
  - 1.4.3 Culture Change

### 2. Diversity Management Concepts and Frameworks

- 2.1 The Concept of Diversity Management
- 2.2 Diversity Management Frameworks

## Module 2: Diversity and Inclusion in Practice

### 1. Integrating Diversity and Inclusion into Business Practices

- 1.1 Formalizing HR Management Practices
  - 1.1.1 Diversity and inclusion Policies
  - 1.1.2 Recruitment and Selection
  - 1.1.3 Compensation
  - 1.1.4 Promotion and Career Advancement
- 1.2 Implementing Diversity Marketing
- 1.3 Implementing Supplier Diversity
- 1.4 Managing Change
  - 1.4.1 Building Support
  - 1.4.2 Communicating Change
  - 1.4.3 Implementing Training and Mentoring on Diversity and Inclusion
  - 1.4.4 Inclusive Leadership
- 1.5 Maintaining Disaggregated Data

### 2. Best Practices for Managing Workplace Diversity

## Module 3: Diversity and Inclusion Strategic Planning

### 1. Strategic Planning in Small Organizations

### 2. Developing a Diversity and Inclusion Strategic Plan

- 2.1 Preparing to Start
- 2.2 Establishing a Task Force
- 2.3 Conducting a Diversity Audit
  - 2.3.1 Demographic Profile
  - 2.3.2 Employee Survey
  - 2.3.3 Analysis of Organizational Policies, Systems, and Practices
  - 2.3.4 SWOT Analysis
  - 2.3.5 The Diversity Audit Report
- 2.4 Developing a Diversity and Inclusion Strategic Plan
- 2.5 Implementing the Strategic Plan
- 2.6 Monitoring and Evaluation

## **How to Use This Manual**

To reap full benefit of the training program, organizations are encouraged to complete all three training modules. The modular structure of the training program allows for:

- A natural progress from awareness of workplace diversity concepts and rationale, to practical guidance on diversity management strategies and tools.
- Easier customization of training content based on participants' needs.
- Flexible and staggered training sessions over a time period convenient to participating businesses.

The training modules feature a number of authentic case studies and a quick survey. Modules two and three include practical tools for managing, planning and monitoring diversity initiatives and practical guidelines for building an inclusive culture. Each chapter starts with an introduction featuring the key questions that the chapter will address and ends with a summary of the main ideas contained in the chapter.

Participating organizations are encouraged to share their experiences, explore new approaches and tools, reflect on their current business practices, and learn from the experiences of others.

## **The USAID LENS Project**

The USAID Jordan Local Enterprise Support Project (LENS) is a five-year project that supports small business growth and better economic planning to strengthen Jordanian communities against economic adversity.

USAID LENS brings local governments, business owners, and key community groups to collaborate together on initiatives that boost economic development and create jobs in their communities. These initiatives are focused on supporting the growth of micro and small enterprises (MSEs) and inclusive of women, youth and the underprivileged.

## **Acknowledgments**

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## Chapter One

# Strategic planning in Small Organizations





# 1. Strategic planning in Small Organizations

Not many small enterprises engage in strategic planning, as the process is considered both laborious and lengthy. Small organizations often adopt one of two extreme approaches when it comes to strategic planning<sup>(1)</sup>:

- They avoid it entirely.
- They overplan in an attempt to produce the perfect plan document.

## What is Strategic Planning?

Strategic planning is a management tool which provides a framework for focusing efforts in pursuit of organizational goals. Moreover, a strategic plan ensures both management and employees work toward the same goals.

The strategic planning process provides the organization with an opportunity to assess its current situation, define desired goals and achievements, and map out directions to reach those achievements. The planning process aims to answer three basic questions:

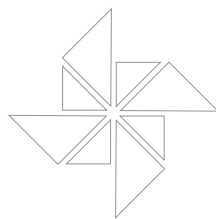


While a plan document is needed to capture the results of the planning process by articulating organizational goals, strategies, and activities; the real value of a plan is laying the foundation for achieving actual results<sup>(2)</sup>. The plan does not need to be massive in scope, and the change required to achieve results should not be overwhelming to either management or employees.

Small organizations can approach planning in a manner that reflects their needs and capacities by:

- Defining a realistic timespan for the plan; i.e. short (one year), medium (three years), or long term (five years).
- Defining a realistic timeframe for implementation of planned activities based on available human and financial resources.
- Customizing the planning process itself based on the organization's capacity and time available to engage in the planning activity.
- Focusing effort on one or two diversity and inclusion priorities at a time.

The following chapter provides a step-by-step approach to diversity and inclusion strategic planning. Organizations are encouraged to customize both the approach and the tools provided based on their needs and capacities.





## Chapter Two

# Developing a Diversity and Inclusion Strategic Plan







## 2. Developing a Diversity and Inclusion Strategic Plan

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### KEY QUESTIONS

In this chapter, you will find answers to the following key questions:

- What are the phases of the diversity strategic planning process?
- How do we conduct an organizational assessment/audit from a diversity and inclusion perspective?
- What does a diversity audit entail?
- How do we develop a diversity and inclusion strategic plan?

### LEARNING OBJECTIVES

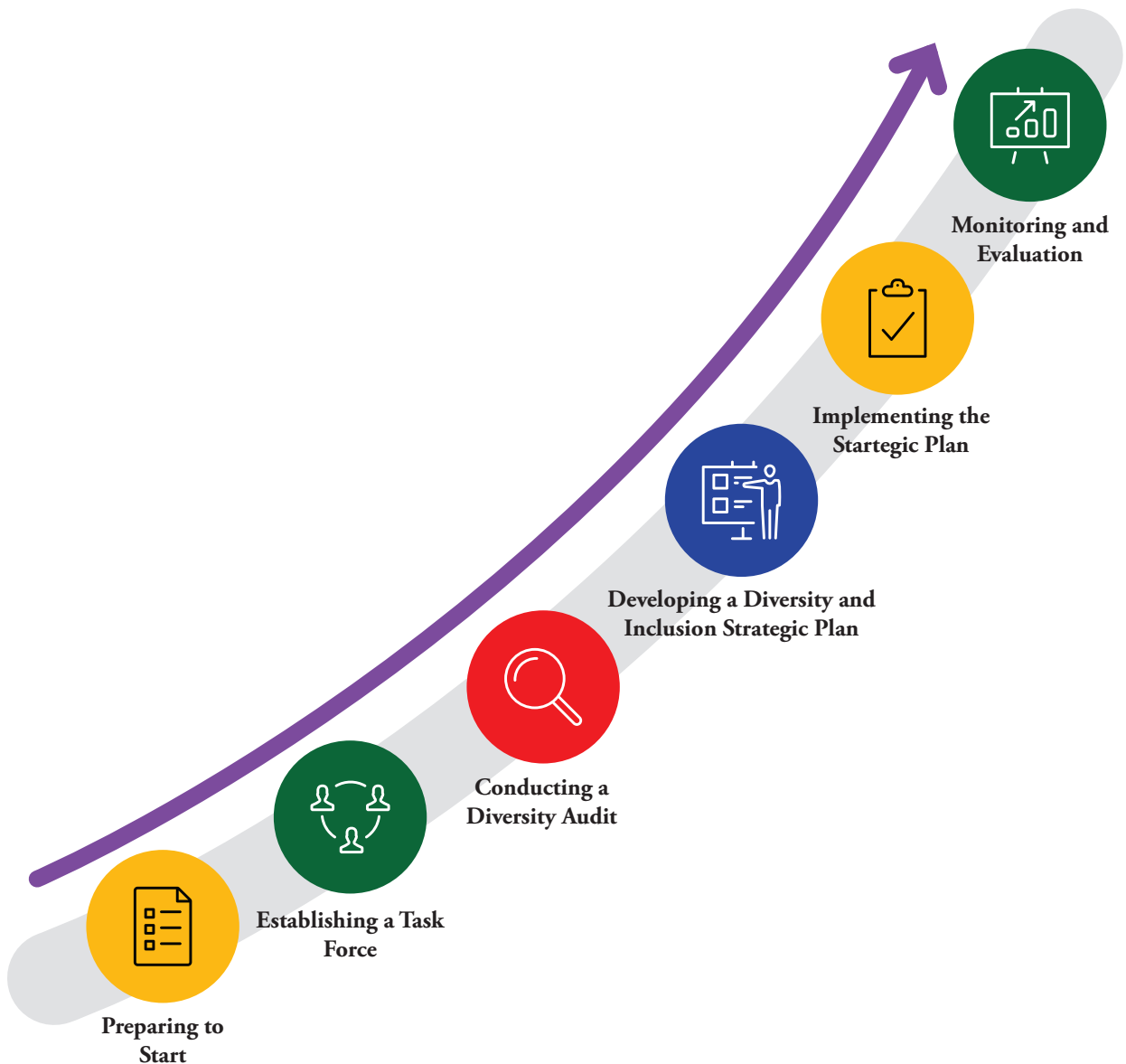
Upon completing this chapter, you will be able to:

- Describe the phases of the diversity strategic planning process.
- Identify the elements of a diversity audit and the implementation mechanism for each element.
- Identify the components of a diversity and inclusion strategic plan.
- Develop diversity and inclusion goals, objectives, strategies, activities, and indicators.
- Describe the components of an action plan.
- Explain the purpose of monitoring and evaluation.

## Developing a Diversity and Inclusion Strategic Plan

A diversity strategic plan is crucial to the success of organizational diversity and inclusion efforts. The purpose of the strategic plan is to clarify the rationale for investing resources to implement diversity and inclusion initiatives and to provide direction for achieving goals.

The strategic planning process entails building knowledge of the realities of workforce demographics and work environment, identifying challenges, establishing goals and objectives, and formulating strategies to achieve desired outcomes. The graph below illustrates the phases of the diversity strategic planning process:



### The Diversity Strategic Planning Process

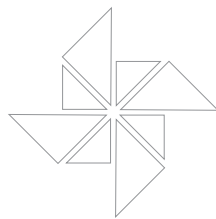
The following sections provide detailed explanation of these phases.

## 2.1 Preparing to Start<sup>(3)</sup>

Before starting any organization-wide diversity effort, organizational leadership and senior management should:

- Learn about the diversity strategic planning process through reading and training.
- Examine case studies of successful organizational diversity initiatives.
- Define the motivations for adopting diversity and inclusion and the desired outcomes of related initiatives.
- Define the focus of diversity and inclusion efforts: are they going to be internal, or external, or both.
- Identify employees to be involved in the planning process and the need for hiring an external consultant.
- Identify required financial resources for the planning process.

This preparatory work helps build the required commitment and enthusiasm for successful diversity strategic planning among leadership and senior management team.





## 2.2 Establishing a Diversity Task Force

A diversity task force, also called a diversity committee, is a small group of employees entrusted by organizational leadership to start a diversity management initiative. The following are some guidelines for setting up the task force:

- Select task force members based on competencies required to accomplish the required objectives and tasks. These competencies may include knowledge and understanding of the organizational contexts for diversity and inclusion; awareness of best practices for planning diversity initiatives; and the ability to work collaboratively and effectively across many departments.
- Ensure diverse representation of the diversity task force. Task force members should reflect diversity within the organization; they should comprise women and men, different generations, and other dimensions of diversity.

### TASK FORCE CHARTER

It is a good idea to develop a charter for the diversity task force.

A charter is a short document developed through a participative approach during the forming of the team. It identifies task force members and their roles and responsibilities. It also defines the purpose, scope of work, expected deliverables, and timelines pertaining to the activities of the task force. Hence, the charter also serves as an action plan for the team.

A sample task force charter template is available in **Annex 1**.

It is also important to represent all functional areas/ departments to ensure organization-wide diversity effort<sup>(4)</sup> and multiple perspectives, bearing in mind that task force members are also potential diversity advocates.

- Ensure that organizational leadership remains the visible leader and sponsor of the diversity effort within the organization, even if a senior manager is assigned the responsibility of leading the task force.
- Ensure that organizational leadership remains accessible to the task force.



## 2.3 Conducting a Diversity Audit

The main purpose of a diversity audit is to assess organizational status and/or progress in promoting diversity and inclusion. It is an essential step in the diversity strategic planning process because it helps organizations identify existing issues, and provides a baseline against which outcomes of future actions and activities can be benchmarked.

The diversity audit builds a foundation for organizational change in areas such as strategic planning, policies and procedures, and communication. It typically consists of the following elements<sup>(5)</sup>:

- A demographic profile
- An employee survey
- An analysis of organizational policies, systems, and practices
- An analysis of strengths, weaknesses, opportunities and threats (SWOT)

Another element is added when the audit covers marketing diversity programs and practices:

- A study of the company's marketing efforts to reach potential or underserved market segments

### 2.3.1 Demographic Profile

A demographic profile is the output from current internal labor supply analysis and is based on primary diversity dimensions; i.e. gender, age, ability/disability, race, ethnicity, national origin, and religion. This profile is documented against job function and level, education, experience, length of service, and pay.

It is also helpful to measure trend data, such as turnover and absenteeism rates. This data will assist organizations identify groups with increasing turnover or absenteeism, and follow up with investigative

### DIVERSITY AUDIT

A diversity audit is an assessment or diagnosis of the current status of diversity within an organization based on quantitative and qualitative data. Diversity audits are typically conducted on an annual basis.

In small organizations, it is not unusual for the diagnostic phase to focus on SWOT analysis as the main tool for assessment. It is important, however, to rely on facts and not just perceptions when engaging in this analysis.



## WHY ARE EMPLOYEE DEMOGRAPHIC PROFILES IMPORTANT?

Employee demographic profiles describe the composition of the workforce and the representation of employees across the organizational hierarchy – both horizontally and vertically.

Understanding employee demographics can assist organizational decision-makers in recognizing deficiencies in their workforce composition and distribution, and in developing their diversity and inclusion initiatives to achieve a balanced representation of diverse employees across the organization.

Developing a demographic profile entails aggregating employee data, i.e. compiling and summarizing data; then disaggregating data by breaking it down into component parts.

A summary guide for preparing a workforce demographic profile is available in **Annex 2**.

measures to collect qualitative data to identify factors influencing such decisions and practices.

### **Data Sources**

The main sources of information for the demographic profile are:

- Employee records
- Organizational structure
- Payroll records
- Timekeeping or attendance system

### 2.3.2 **Employee Survey**

A diversity survey is an essential tool for evaluating diversity and inclusion in the workplace. Survey results depict employees' perceptions and opinions regarding organizational diversity and inclusion policies, systems, and practices; enabling the organization to map out needed improvements.

#### **A written survey has several advantages:**

- It allows employees to take time and think about their responses.
- It allows employees to be anonymous, and consequently, be more honest.
- It allows the organization to standardize the information collected.

#### **General Guidelines for Designing and Administering the Survey**

In devising and administering the survey, the diversity task force should adhere to the following general guidelines:

- Define what specific information needs to be collected and include enough questions to get the required information without making the survey lengthy. A long survey may discourage employee



participation and will require more time and effort to analyze.

- Ensure the questions are clear and easy to answer.
- Include multiple choice and open-ended questions. Multiple choice questions may be yes/no, or true/false, or rating-scale questions. When using rating scale questions, the respondents are given a five-point rating scale with a neutral middle point. Below is an example:

Strongly Disagree	Disagree	Neutral (Neither Agree nor Disagree)	Agree	Strongly Agree
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- Test the survey before organization-wide distribution; even if among task force members.
- Communicate with employees about the survey before it is distributed:
  - Provide background information as to why the organization is conducting the survey. Emphasize the organization's commitment to diversity and include some information on the benefits of having a diverse workforce.
  - Emphasize the importance of honest feedback to improve the effectiveness of diversity programs and practices. The survey may be called: "feedback survey" or "opinion survey" to encourage participation.
  - Assure employees that their feedback will remain confidential, and that it will be thoroughly evaluated and considered in any follow-up action steps.
- Provide a deadline for receiving responses.
- Consider using online survey tools to facilitate administration and analysis of results; such as Survey Monkey, Google Forms, and Survey Planet.

When analyzing survey results, the task force should consider employee perceptions of the work

A sample employee survey is available in **Annex 3**.

environment as indicators for improvement areas. The following are some pointers to look for<sup>(6)</sup>:

- Do employees consider systems of performance appraisals, rewards and promotions to be fair and unbiased?
- Do employees have access to important resources and information?
- Do employees have the ability to influence decision-making?
- Do employees perceive that they have opportunities to acquire and develop new skills through training and coaching?
- Do employees perceive that they have opportunities to advance their careers?
- Do employees believe they can balance work and life responsibilities? Do they require flexible work arrangements?
- Do employees perceive that they are valued and respected?

Answers to multiple choice questions are best presented visually through charts and graphs. Responses to open-ended questions should be categorized under themes.

### **2.3.3 Analysis of Organizational Policies, Systems, and Practices**

The diversity task force should analyze all organizational policies and procedures that may have impact on the workforce, focusing on strengths, weaknesses, and gaps. These policies and procedures may include:

- Recruitment and selection
- Compensation and benefits
- Performance management
- Training and development
- Promotions
- Succession planning
- Employee relations (for example, grievance and disciplinary policies)

If the scope of work includes external focus - such as customers, suppliers, local communities; relevant policies, procedures, and systems should be analyzed, too. For example:

- Marketing communication
- Customer service
- Corporate social responsibility
- Supplier diversity

In analyzing policies, systems and practices, the task force should address the following questions:





- Do the policies clearly express the organization's values of diversity and inclusion?
- Do the policies express accountability?
- Are the policies implemented in an equitable manner?
- Are relevant procedures available for implementing the policies?
- Does the company communicate relevant policies and systems internally and externally? For example, do job announcements include a statement regarding the organization's promotion of diversity and inclusion principles? Are employees made aware of the organization's pay system?

### 2.3.4 SWOT Analysis

The diversity task force should conduct an analysis of the strengths, weaknesses, opportunities and threats (SWOT) from a diversity and inclusion perspective, and based on the findings of the diversity audit. Strengths and weaknesses are internal factors in the organization (such as resources, policies, leadership); while opportunities and threats are external factors (such as laws and regulations, competitors, suppliers, and customers).

The analysis is best conducted in a brainstorming session dedicated for that purpose.

SWOT analysis is an invaluable tool for planning because it allows organizations not only to identify critical areas to address in their strategies, but also to explore approaches and strategies for capitalizing on opportunities to enhance strengths, addressing weaknesses, and reducing the impact of threats.

After identifying factors under each area, the task force can begin strategizing from SWOT analysis by raising the following questions:

- How can the organization enhance its strengths?
- How can the organization reduce its weaknesses?

### QUICK SURVEY

Does your organization have written HR, marketing, financial, and operational policies and procedures?

Yes (specify) \_\_\_\_\_

No

### SWOT ANALYSIS MATRIX

A SWOT analysis matrix is available in **Annex 4**.

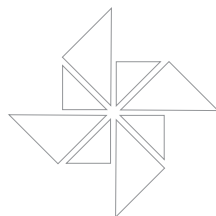
- How can the organization benefit from opportunities?
- How can the organization overcome threats and constraints?

### 2.3.5 The Diversity Audit Report

The diversity audit report represents the foundation for the strategic approach that the organization will adopt to improve workplace diversity and inclusion. The report contains a description of the following:

- **Purpose** of the report and a reference to the task force charter or charge.
- **Methodology** adopted in implementing the audit; for example, demographic analysis, employee opinion survey, focus groups, interviews, and analysis of organizational policies and procedures.
- **Findings** of the audit organized under major themes. This section will cover findings from demographic analysis, employee opinion survey, review of policies and procedures, and SWOT analysis.
- **Conclusions** highlighting areas that need to be addressed to improve diversity and inclusion in the workplace.
- **Recommendations** for improving diversity and inclusion in the organization, including policies, procedures, systems, and practices that need to be introduced or modified or expanded.

While circulation of the full audit report is usually restricted to senior management<sup>(7)</sup>, a summary of the results and subsequent actions should be communicated to all employees. Communication is important to assure employees that their opinions and concerns will contribute to the future strategy<sup>(8)</sup>.





## 2.4 Developing a Diversity and Inclusion Strategic Plan<sup>(9)</sup>

This phase involves the management team from all business functions in developing a diversity and inclusion strategic plan that reflects the organizational approach to achieving a diverse and inclusive workplace. The timeframe of the plan is usually 3 to 5 years.

The plan consists of the following elements:

- **A message from the general manager:** The message should confirm organizational leadership commitment to workplace diversity and inclusion, and stress the importance of the plan in achieving set organizational vision, goals and objectives. It should also emphasize accountability of all employees for implementing the plan.
- **Definitions of diversity and inclusion** within the organizational context. The definition of diversity should be broad to accommodate all diversity dimensions.
- **Diversity and inclusion vision:** A short statement describing a better workplace shaped by organizational efforts (what the organization will look like) and how it relates to the mission of the organization. The connection to mission is crucial to ensure that diversity is not perceived as separate from overall business activities<sup>(10)</sup>.
- **Strategic focus areas:** The core themes for realizing the vision; also called strategic priorities. It is better to focus effort on a small number of areas (3 to 6), than include many in the plan and not be able to implement related activities.
- **Goals:** The overall achievements that must be attained to improve workplace diversity and inclusion for each focus area. Goals should address the gaps and improvement areas identified through the diversity audit. Goals are long-term

### QUICK SURVEY

Does your organization carry out any kind of planning?

Yes (explain) \_\_\_\_\_

No

### SAMPLE DIVERSITY AND INCLUSION VISION STATEMENTS

“Achieving greater diversity, equity, and inclusion in everything we do is inextricably linked to our mission to protect our planet and defend the rights of all people to a healthy environment.”

*Earth Justice. <https://earthjustice.org/>*

“We embrace the diversity of humanity and all it brings to innovation. Because the best way the world works is everybody in. Nobody out.”

*Apple Inc. <https://www.apple.com/>*

### EXAMPLES OF DIVERSITY AND INCLUSION FOCUS AREAS

Inclusive culture

Diverse talent

Equitable talent development

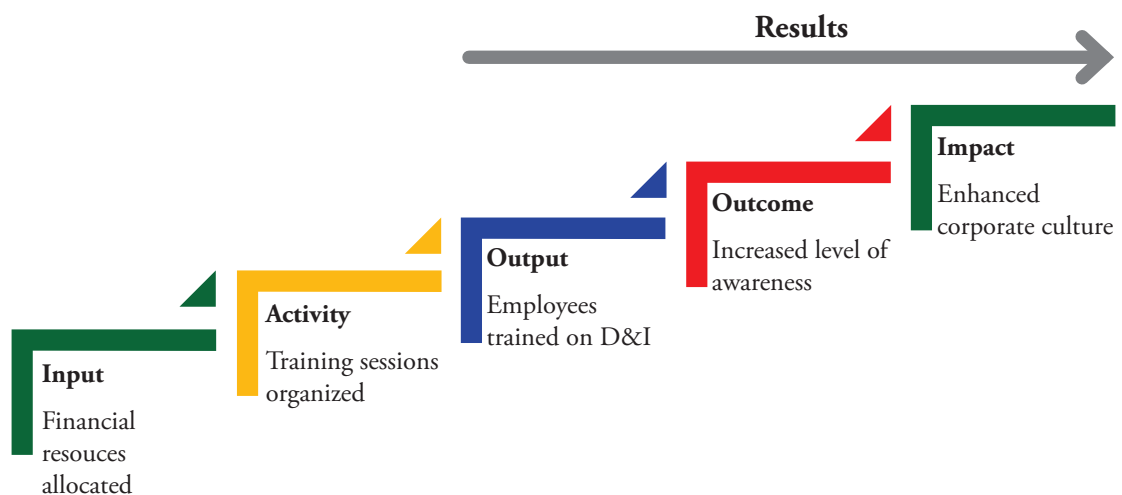
Supplier diversity

and articulate a position or an accomplishment to be attained rather than how that will be achieved<sup>(11)</sup>.

For example, “senior management is accountable for driving and supporting diversity and inclusion in the workplace”; or “attract and retain a diverse workforce that reflects our customer base”.

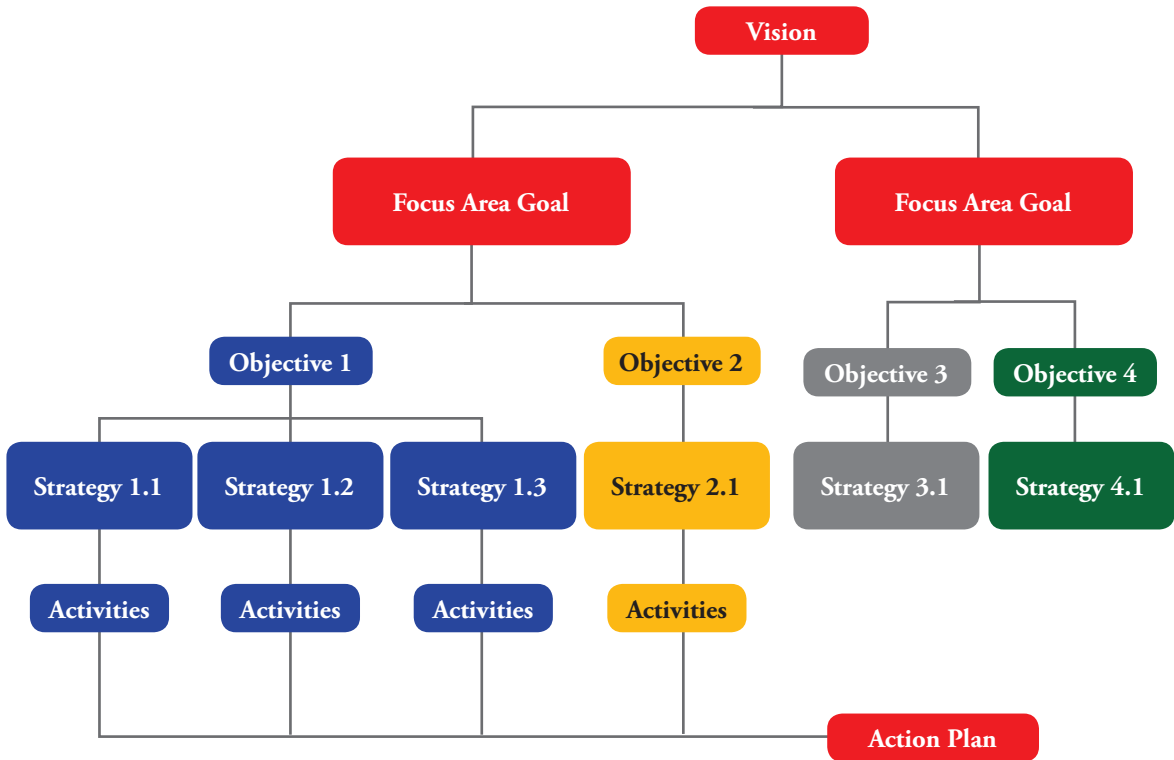
- **Objectives:** The specific targets that must be reached to realize goals. Objectives are usually short-term and can be achieved within one to two years. For example, “develop a marketing communication strategy with strong diversity and inclusion messages”; or “recruit and retain talented disabled employees”.
- **Strategies:** The course of actions that will be adopted for achieving objectives.
- **Activities:** Specific activities, events, or resources the organization will develop or employ to implement strategies.
- **Performance Indicators:** A set of measurable values that indicate the organization’s progress in achieving its goals. Quantitative and qualitative indicators rely on the availability of data sources such as survey results, employment records, grievance records, training assessment reports, etc.

Indicators are used to measure the outputs, outcomes, and impact of implemented activities<sup>(12)</sup>. The graph below is an example about providing training on diversity and inclusion to employees:



Diversity and inclusion indicators for HR management may include turnover rates, absenteeism rates, lateness rates, employee satisfaction levels, percentage of diverse individuals at function and job levels, number of staff trained on diversity and inclusion. For marketing they may include market share, or the number of new customers from a certain market segment.

The graph below illustrates the structure of the strategic plan:



### Diversity and Inclusion Strategic Plan: From Vision to Action

 **EXAMPLE GOALS, OBJECTIVES, STRATEGIES, ACTIVITIES, AND INDICATORS**

<b>Focus Area</b>	Inclusive Culture
<b>Goal</b>	Cultivate an enabling and inclusive work environment and culture where people can contribute to the fullest of their potential.
<b>Objective 1</b>	Promote a healthy balance between work and personal life.
<b>Strategy 1.1</b>	Introduce flexible and part-time work arrangements.
<b>Activities</b>	<p><b>1.1.1</b> Develop policies and procedures for flexible and part-time work arrangements.</p> <p><b>1.1.2</b> Communicate new policies and procedures to all employees via email and during staff meetings.</p>
<b>Indicators</b>	<ul style="list-style-type: none"> <li>• Flextime and part-time policies and procedures developed and made available to all employees.</li> <li>• Number of employees benefiting from flexible and part-time work arrangements.</li> <li>• Turnover rate due to work-life balance issues reduced by (%).</li> </ul>
<b>Objective 2</b>	Increase awareness and understanding of diversity and inclusion among employees.
<b>Strategy 2.1</b>	Train employees on the concepts and value of workplace diversity and inclusion.
<b>Activities</b>	<p><b>2.1.1</b> Produce a training handbook on workplace diversity and inclusion.</p> <p><b>2.1.2</b> Devise a training schedule.</p> <p><b>2.1.3</b> Conduct training sessions.</p> <p><b>2.1.4</b> Produce a report on implemented training workshops, incorporating evaluation of the training.</p>
<b>Indicators</b>	<ul style="list-style-type: none"> <li>• (%) of employees attended training on diversity and inclusion.</li> <li>• (%) of employees stated that the training improved their understanding of the concepts of workplace diversity and inclusion.</li> </ul>

## Exercise

Choose a focus area for a diversity and inclusion strategic plan, and write down a goal, an objective, a strategy, activities and indicators.

<b>Focus Area</b>	
<b>Goal</b>	
<b>Objective</b>	
<b>Strategy</b>	
<b>Activities</b>	
<b>Indicators</b>	



### Dar Al Omran's Gender Diversity Initiative Case Study

DAR AL OMRAN Planning, Architecture. Engineering gender diversity initiative was implemented between 2015 and 2017, with a 40% subsidy from GIZ-EconoWin. The company conducted a gender audit which comprised an employee satisfaction survey and an analysis of existing HR management policies and systems; developed an action plan; and piloted a number of activities before starting organization-wide implementation.

Some of the actions adopted as part of the initiative included:

- Integrating gender diversity into organizational strategy under HR objectives.
- Using organizational core values to reinforce an inclusive culture: for example, "trust" and "accepting one another".
- Highlighting gender diversity in their equal opportunity policy and embedding the policy in job announcements. The policy expresses the company's commitment to providing equal opportunity to all its employees in recruitment, selection, promotion, compensation, transfer, and training.
- Including gender diversity management in performance appraisals to ensure accountability.
- Introducing work-life balance policies and procedures, covering flextime and teleworking arrangements, phased-out and phased-in part-time work during and after maternity leave, and paternity leave.

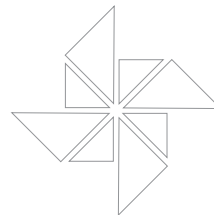
*CONT..*

## 2.5 Implementing the Diversity and Inclusion Strategic Plan

An *action plan* or *implementation plan* should be developed to guide organizational effort in implementing the strategic plan. The plan is a detailed description of the specific activities, timeframes, required resources, and responsible persons involved in implementation.

In defining required resources, the task force should cover:

- **Human resource requirements:** In addition to task force members, which company employees should help in the implementation of diversity and inclusion initiative(s)? Who will provide administrative and communication support? Does the organization need to recruit external trainers or consultants?
- **Supplies, materials, and equipment requirements:** What are the required resources that need to be purchased or acquired?
- **Financial requirements:** What are the cost estimates of required resources?



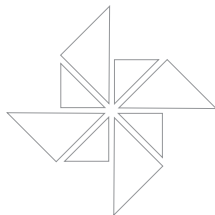




## 2.6 Monitoring and Evaluation

Organizations must establish procedures for periodic review of diversity and inclusion goals and initiatives to ensure that the plan is moving toward desired goals. For example, a quarterly review may include collecting data on recruitment practices: what advertising channels were used to attract applicants from underrepresented groups; how many applications were received; how many people were interviewed; how many people were appointed. The collected data is used to determine progress in achieving related goals and objectives.

Collecting and analyzing this kind of data throughout the implementation of an initiative will reveal how effective the adopted strategies are in achieving desired goals, and whether there is a need for revising specific activities. The process also assesses whether the actual costs are in line with budgeted costs.



A sample diversity and inclusion strategic plan template is available in **Annex 5**.

### *CONT...*

- Modifying attendance fingerprint system to take on part-time and flextime work.
- Implementing employee training on work-life balance.
- Implementing training on gender diversity management for heads of sections and middle management.

Initiative performance indicators include:

- Female share in company
- Female share in each department
- Female retention rate
- Female turnover rate
- Retention rate after maternity leave

Today, DAR AL OMRAN has 177 employees; with women constituting 35% of the total workforce and around 20% of middle management. One of their female team leaders is a teleworking employee residing in the United States. Moreover, 15% of DAR AL OMRAN's site supervision engineers are women.

The company maintains ongoing monitoring and evaluation and will be focusing on external communication during the coming two years.

# Chapter Summary

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A diversity strategic plan is crucial to the success of organizational diversity and inclusion efforts. The strategic planning process includes six phases:

1. **Preparing to Start:** Leadership and senior management should learn about the diversity strategic planning process; define the motivations for adopting diversity and inclusion and the desired outcomes of related initiatives; define the focus of diversity and inclusion efforts: are they going to be internal, or external; and identify required human and financial resources.
2. **Establishing a Diversity Task Force:** the task force is a small group of employees entrusted by organizational leadership to start a diversity management initiative.
3. **Conducting a Diversity Audit:** The audit aims to assess organizational status and/or progress in promoting diversity and inclusion. It typically consists of a demographic profile; an employee opinion survey; an analysis of organizational policies, systems, and practices; and a SWOT analysis. A study of the company's marketing efforts to reach potential or underserved market segments is sometimes included in the audit.
4. **Developing a Diversity and Inclusion Strategic Plan:** The timeframe of the plan is usually 3 to 5 years. The planning process involves the management team from all business functions.

The plan consists of the following elements:

- A Message from the General Manager
- Diversity and inclusion vision
- Goals
- Strategies
- Performance Indicators
- Definitions of *diversity* and *inclusion*
- Strategic focus areas
- Objectives
- Activities

5. **Implementing the Diversity and Inclusion Strategic Plan:** An *action plan* or *implementation plan* should be developed to guide implementation of the strategic plan. The action plan includes a detailed description of the specific activities, timeframes, required financial resources, and responsible persons involved in implementation.
6. **Monitoring and Evaluation:** Organizations establish procedures for periodic review of the implementation to evaluate the effectiveness of the adopted strategies in achieving desired goals, and whether there is a need for revising specific activities.

# Annexes

- ✦ **Annex 1:** Task Force Charter Template
- ✦ **Annex 2:** Demographic Profile Template
- ✦ **Annex 3:** Sample Employee Opinion Survey
- ✦ **Annex 4:** SWOT Analysis Matrix
- ✦ **Annex 5:** Diversity and Inclusion Strategic Plan Template
- ✦ **Annex 6:** Complete Case Studies



# Annex 1: Diversity Task Force Charter

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This Charter of the Diversity Task Force was adopted by (Senior Management) of (Company) on (date).

## Purpose

Why was the task force established? What should it accomplish? What problem, challenge, or opportunity will it address?

## Scope of Work

What activities is the task force expected to perform?

## Deliverables

What specific and tangible items will the task force create?

## Members

Who are the task force members? Who is the task force leader?

## Timeline

What is the timeline for key activities and deliverables?

# Annex 2: A Summary Guide for Preparing a Workforce Demographic Profile

## Compiling the Data

### Notes:

- Refer to your employee records to compile the following data about your workforce. Use Microsoft Excel for data compilation.
- You can adjust data as needed to reflect your organizational structure and demographic composition. For example, you can adjust job functions and levels; add ethnicity/national origin or disability to reflect the diversity dimensions of your workforce.

<b>Employee Name</b>	<b>Age</b>		
<b>Age Band</b>	<b>Gender</b>	<b>Marital Status</b>	<b>Educational Level</b>
<input type="checkbox"/> 20 and below <input type="checkbox"/> 21 - 29 <input type="checkbox"/> 30 – 39 <input type="checkbox"/> 40 – 49 <input type="checkbox"/> Above 50	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Married <input type="checkbox"/> Single <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed	<input type="checkbox"/> High school <input type="checkbox"/> Technical/Vocational <input type="checkbox"/> Diploma <input type="checkbox"/> Bachelor’s <input type="checkbox"/> Master’s <input type="checkbox"/> Doctorate
<b>Job Level</b>		<b>Job Function</b>	
<input type="checkbox"/> Senior management <input type="checkbox"/> Middle management <input type="checkbox"/> Supervisory <input type="checkbox"/> Staff <input type="checkbox"/> Entry		<input type="checkbox"/> General Management <input type="checkbox"/> Sales <input type="checkbox"/> Operations <input type="checkbox"/> Information Systems <input type="checkbox"/> Marketing <input type="checkbox"/> Finance/Accounting <input type="checkbox"/> Administration <input type="checkbox"/> Human Resources	
<b>Employment Type</b>		<b>Years of Experience</b>	
<input type="checkbox"/> Full time <input type="checkbox"/> Part time <input type="checkbox"/> Casual		<b>Years of Service:</b> _____ <b>Pay:</b> _____	

## Analyzing the Data

### Notes:

- Use pivot tables in Microsoft Excel to produce disaggregated data that will aid in analyzing your workforce and its implications for diversity and inclusion. For example, you can analyze:
  - Gender distribution across job functions
  - Gender distribution according to job level
  - Average pay by job level and by gender
  - Average years of service by gender
- The table below includes suggestions for different ways to present the data, i.e. as a number, percentage, or average.

Demographic Factor	Number	Percentage	Average
Age			•
Age Band	•	•	
Gender	•	•	
Job Function	•	•	
Job Level	•	•	
Employment Type	•	•	
Years of Service			•
Pay			•
Educational Level	•	•	
Years of Experience			•
Years of Service			•
Marital Status	•	•	

- What does disaggregated data reveal about the composition and distribution of your workforce?
- What are the implications of this data for the effectiveness and equity of your people management practices?
- For example, is there a gender gap in the representation of employees across functions? Or job levels? Is there a pay gap?

## Calculating Turnover Rate

### Notes:

- Turnover rate is usually calculated on a quarterly or annual basis.
- Use your employee records to compile the number of separations and the reason for separation per business unit (section or department) during your measurement period.
- The table below is a demonstration of how turnover is analyzed by gender and by business unit. You may examine your turnover data by gender, years of service, educational level, or job level.

	Gender		Reason for Separation						Total # of Separations per Unit
	Male	Female	Resignation	Discharge	Retirement	Health Issues	Death	Other	
Unit A									
Unit B									
Unit C									
Total Number of Separations									

- Calculate your turnover rate using the following formula (include only employees on payroll, and exclude unavoidable/voluntary separations due to retirement, health issues, relocation, and death):

Turnover Rate = (Number of separations during the measurement period / average number of employees during the measurement period\*) x 100

\*Average Number of Employees = the sum of the number of employees for each month in the measurement period (employees on payroll) divided by the number of months

*Example:* In a department of eight employees, two people left during the measurement period. Turnover Rate = (2/8) X 100 = 25%



# Annex 3: Employee Opinion Survey

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This survey is designed to measure your perceptions about diversity and inclusion in the workplace. Your individual responses are completely anonymous and confidential. Only group level results will be presented back to management.

The survey will take approximately 20 minutes to complete. Kindly send your completed survey to (email) by (date).

## Definitions

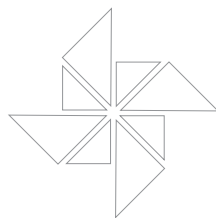
Please keep the following definitions in mind when completing this survey:

**Diversity:** representing and integrating people with diverse characteristics and backgrounds into our organization.

**Inclusion:** valuing and respecting the uniqueness of our people and providing them with the opportunity and support needed for them to contribute to organizational mission and goals.

**Personal Characteristics:** Attributes such as gender, age, ability/disability, ethnicity/national origin, religion, socio-economic background, education, etc.

**Note:** In sections 1 and 2 below, please use the “Neither Agree nor Disagree” response option sparingly, reserving it only for those items on which you truly have no opinion one way or the other.



 **Section 1:**

Based on your perception, please indicate your level of agreement or disagreement with the following statements:

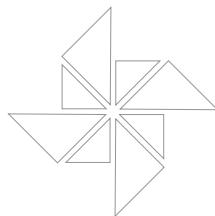
	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neither Agree nor Disagree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>	<b>I Don't Know</b>
1. The organization values employees with diverse characteristics and backgrounds.						
2. The organization values employees with diverse views.						
3. The organization has policies for recruitment, hiring, developing and promoting employees.						
4. Organizational policies promote fair treatment of all employees.						
5. The organization has a non-discrimination policy.						
6. The organization takes appropriate action in response to incidents of discrimination.						
7. The organization engages in targeted recruitment of diverse job candidates.						
8. The organization has a clear compensation system.						
9. The organization has a clear performance management system.						

	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neither Agree nor Disagree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>	<b>I Don't Know</b>
10. The organization ensures merit and results drive rewards and recognition.						
11. The organization offers fair and equal access to training and development opportunities for all employees.						
12. The organization offers fair and equal opportunities for career advancement for all staff.						
13. Promotions are awarded fairly.						
14. The organization encourages and values different styles of leadership.						
15. Where possible, the organization offers flexible work arrangements to all employees who want them.						
16. Managers and supervisors value having employees with diverse characteristics.						
17. Managers and supervisors value having employees with diverse views.						

	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neither Agree nor Disagree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>	<b>I Don't Know</b>
18. Managers and supervisors assign employees with diverse characteristics and viewpoints to work together.						
19. Managers and supervisors encourage all employees to participate in the decision-making process.						
20. Managers and supervisors address bias and discrimination.						
21. Coworkers treat me with respect.						
22. Coworkers listen respectfully to my views about work related matters.						
23. Coworkers accept differences in my personal characteristics.						
24. I am given adequate opportunities to demonstrate my skills.						
25. I have all the resources I need to do my job properly, including access to information.						

	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neither Agree nor Disagree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>	<b>I Don't Know</b>
26. I am given opportunities to develop my skills through training and coaching.						
27. I am provided with opportunities to advance in my career.						
28. I am provided with ongoing feedback about my work performance.						
29. My contributions and achievements at the organization are recognized.						
30. I feel I am a valued employee at the organization.						
31. I do not feel pressured to change things about myself in order to fit in at the organization.						
32. I have never felt uncomfortable or out of place because of my personal characteristics.						
33. I feel free to express my opinions about work related matters.						
34. I am always involved in important decisions that affect my work.						

	<b>Strongly Agree</b>	<b>Agree</b>	<b>Neither Agree nor Disagree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>	<b>I Don't Know</b>
35. I have a clear understanding of the organization's values and behavioral standards.						
36. I can balance my personal/family responsibilities with my current workload and schedule.						
37. My salary is comparable to similar jobs in my company.						
38. The benefits I receive are comparable to those offered to others in my company.						
39. Overall, I would recommend the company as a good place to work.						
40. Overall, I am a satisfied employee.						



 **Section 2:**

What do you think of diversity and inclusion practices within the organization?

In what specific areas affecting diversity, equity, and inclusion do you think the organization needs to improve?

 **Section 3:**

Please cross the boxes that best describe your personal and professional profile:

Gender	Age	National Origin	Job Level	Years of Service
<input type="checkbox"/> Female	<input type="checkbox"/> 20 and below	<input type="checkbox"/> Jordanian	<input type="checkbox"/> Supervisory	<input type="checkbox"/> Less than 5
<input type="checkbox"/> Male	<input type="checkbox"/> 21 – 29	<input type="checkbox"/> Non-Jordanian	<input type="checkbox"/> Non-supervisory	<input type="checkbox"/> More than 5
	<input type="checkbox"/> 30 – 39			
	<input type="checkbox"/> 40 – 49			
	<input type="checkbox"/> Above 50			

*Thank you for taking the time to complete the survey.*

## Annex 4: SWOT Analysis

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<b>Strengths</b>	<b>Weaknesses</b>
<p>What are our advantages?</p> <p>What do we do well?</p>	<p>What are our resource and capability shortfalls? What areas need improvement?</p>
<b>Opportunities</b>	<b>Threats</b>
<p>What opportunities exist in the external environment that we can benefit from?</p>	<p>What factors beyond our control could place the business at risk?</p> <p>What obstacles do we face?</p>



# Annex 5: Diversity and Inclusion Strategic Plan Template

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## **(Company) Diversity and Inclusion Strategic Plan**

Plan period: from – to

### **Message from the General Manager**

Include a short message from the General Manager about the importance of diversity and inclusion in fulfilling the organization's mission. The message should also express leadership commitment to diversity and inclusion efforts and emphasize accountability.

### **Definitions**

**Diversity:** Provide a broad definition of diversity.

**Inclusion:** Provide a definition of what inclusion means to the organization.

### **Diversity and Inclusion Vision**

Write a short inspirational statement describing the organization's desired state regarding diversity and inclusion.

### **Focus Areas**

List the focus areas of the plan. Restrict to 3 to 6 areas.

### **Goals, Objectives, Strategies, Activities, and Indicators**

Use the hierarchy below to write goals, objectives, strategies, activities and performance indicators.

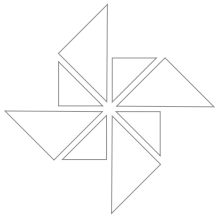
Focus Area: What are the strategic priorities that you are going to pursue?
Goal: What do you want to achieve in regard this focus area in the next 3 to 5 years?
Objective (number): What targets must you meet to ensure that the long-term goal is achieved?
Strategy (number): What specific actions will you implement to achieve goals and objectives?
Activities: What specific activities, services, or products will you develop or employ to implement strategies?
Indicators: How will you measure progress toward achieving goals and objectives? What data sources will you use?

Reprint the template below to cover all focus areas, objectives, and strategies.

<b>Focus Area</b>	
<b>Goal</b>	
<b>Objective</b>	
<b>Strategy</b>	
<b>Activities</b>	
<b>Indicators</b>	

 (Year) Implementation Plan

Focus Area:																	
Goal:																	
Objectives:																	
Strategies:																	
Indicators:																	
Activities	Implementation Timeframe (month)												Indicators	Data Sources	Responsibility	Resources	
	1	2	3	4	5	6	7	8	9	10	11	12					



# Annex 6: Complete Case Studies

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## DAR AL OMRAN Case Study

DAR AL OMRAN is a Jordanian engineering consulting group comprising DAR AL OMRAN Planning. Architecture. Engineering and DAR AL OMRAN Infrastructure & Environment. The group was founded in 1979 and has its headquarters in Amman, with offices in Saudi Arabia and the United Arab Emirates.

### The Motivator

DAR AL OMRAN Planning. Architecture. Engineering formal diversity and inclusion initiative was motivated by an invitation to take part in a competition on gender diversity management organized by GIZ-EconoWin. This opportunity initiated leadership interest in formalizing and enhancing diversity and inclusion practices within the firm.

“Recognition was the first motivator, especially that DAR AL OMRAN was known in the industry for its architecture and engineering operations, but not for its work environment”, says Ms. Hala Sinno, Senior Strategy and Development Officer. “Another motivator was the opportunity to enhance DAR AL OMRAN work environment”.

### The Gender Diversity Initiative

The gender diversity initiative was implemented between 2015 and 2017, with a 40% subsidy from GIZ-EconoWin. DAR AL OMRAN Planning. Architecture. Engineering conducted a gender audit which comprised an employee satisfaction survey and an analysis of existing HR management policies and systems; developed an action plan; and piloted a number of activities before starting organization-wide implementation.

#### **Some of the actions adopted as part of the initiative included:**

- Integrating gender diversity into organizational strategy under HR objectives.
- Using organizational core values to reinforce an inclusive culture: for example, “trust” and “accepting one another”.
- Highlighting gender diversity in their equal opportunity policy and embedding the policy in job announcements. The policy expresses the company’s commitment to providing equal opportunity to all its employees in recruitment, selection, promotion, compensation, transfer, and training.
- Including gender diversity management in performance appraisals to ensure accountability.

- Introducing work-life balance policies and procedures, covering flextime and teleworking arrangements, phased-out and phased-in part-time work during and after maternity leave, and paternity leave.
- Modifying attendance fingerprint system to take on part-time and flextime work.
- Implementing employee training on work-life balance.
- Implementing training on gender diversity management for heads of sections and middle management.

#### **Initiative performance indicators include:**

- Female share in company
- Female share in each department
- Female retention rate
- Female turnover rate
- Retention rate after maternity leave

Today, DAR AL OMRAN has 177 employees; with women constituting 35% of the total workforce and around 20% of middle management. One of their female team leaders is a teleworking employee residing in the United States. Moreover, 15% of DAR AL OMRAN's site supervision engineers are women.

#### **Addressing Middle Management Concerns and Securing Buy-in**

To secure buy-in from middle management, especially with their concerns about the impact of the new arrangements on operations, DAR AL OMRAN Planning, Architecture, Engineering involved managers in all aspects of the project.

The company also arranged a series of training sessions and meetings to provide middle managers with the opportunity to voice out and discuss their concerns. The participation of organizational leadership and senior management in those sessions emphasized leadership commitment to the initiative and provided the support needed to address performance concerns.

#### **The Way Forward**

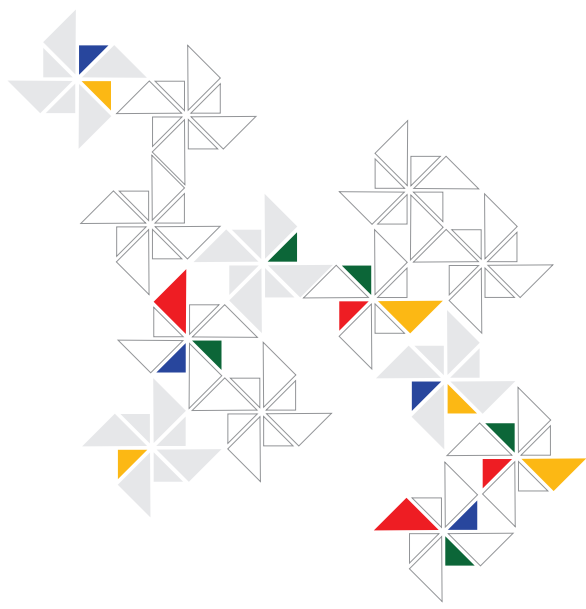
The company maintains ongoing monitoring and evaluation and will be focusing on external communication during the coming two years. DAR AL OMRAN Infrastructure & Environment has introduced flextime and are working on introducing part-time and teleworking arrangements.

# Sources

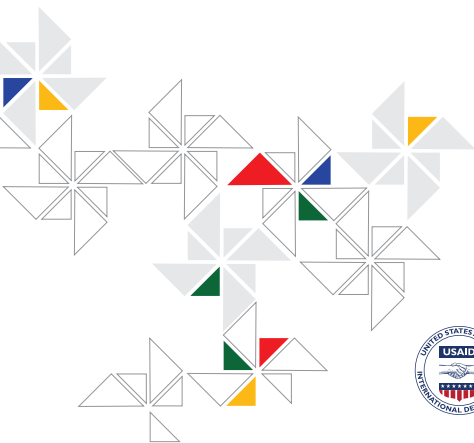
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Workplace  
**Diversity**  
**Management**



**USAID**  
FROM THE AMERICAN PEOPLE

**Local Enterprise  
Support Project**