



# DEI TOOLKIT for association leaders

*Strategies and resources for assessing, infusing, and measuring diversity, equity, and inclusion throughout your organization*



ASSOCIATION  
HEADQUARTERS

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# Introduction

Is your Board committed to ensuring diversity, equity, and inclusion (DEI) within your association but isn't sure where to start on your DEI journey? This toolkit offers ideas and opportunities to consider as you look to assess, infuse, and measure DEI in every facet of your association, including:

1. **Human Resources**
2. **Strategy, Governing Documents, and the Board**
3. **Chief Staff Executive**
4. **Membership**
5. **Credentialing programs**
6. **Programs and events**
7. **Marketing and communication**
8. **Advocacy efforts**
9. **Vendors and suppliers**
10. **Industry/profession**

The DEI toolkit is a compilation of best practices gleaned from many DEI resources and organizations. We have no expectation, nor do we think it's realistic, that an organization can implement all of these suggestions. Rather we hope you will use the toolkit to spark ideas, conversations and strategies that work for your organization. It is by no means exhaustive – if your organization is doing something not mentioned to advance your DEI goals, we'd love to hear about it!

# Human Resources

## 1. Provide DEI training to all staff.

DEI training raises awareness and helps employees better understand and respect differences. Topics to cover include Implicit Bias, Systemic Racism, Microaggressions, Allyship (that is, how to be an ally), Antiracism, Attracting & Retaining a diverse workforce, Inclusion & Belonging, to name a few.

There are many DEI consultants that can provide these trainings. Equity in the Center offers the resource, "So You Want to Hire an Equity Consultant: A Guide for Leaders and Organizations," which provides tips on hiring an equity consultant.

## 2. Embed equity and inclusion into your HR-related processes, policies, and practices, including:

- a. Professional development
  - i. Offer inclusive mentorship programs
  - ii. Provide training to develop high-potential staff
- b. Performance evaluation and management
  - i. Audit the process for bias
  - ii. Use technology to standardize
  - iii. Incorporate peer feedback
  - iv. Switch from annual to quarterly reviews
- c. Career advancement
  - i. Use data to drive decisions
  - ii. Standardize career growth pathways
  - iii. Measure success
- d. Employee retention

## 3. Ensure equitable compensation.

Top Workplaces' DEI survey offers some suggestions for possible DEI compensation strategies:

- a. Adopt a policy not to solicit prior salary information when determining compensation for job candidates
- b. Provide salary information in all job postings
- c. Regularly review compensation to ensure all employees are paid at least the living wage for their location
- d. Adopt a policy to pay employees with disabilities at the same level as those without disabilities in similar roles
- e. Adopt a pay equity policy and regularly conduct a pay equity audit
  - i. Address unexplained differences in pay
  - ii. Have a policy and process to consider pay equity during raises, promotions, and hiring

## OTHER INCLUSIVE BENEFITS TO CONSIDER:

- Affordable medical plan(s)
- Multiple medical plan options
- Health Savings Accounts
- Mental health benefits
- Full medical benefits for transgender individuals
- Gender transition leave
- Benefits eligibility for same and differently gendered domestic partners and spouses
- Benefits eligibility extended to full family in household, including elders
- Caregiver leave policies
- Employee Assistance Program available to full- and part-time employees
- Option to purchase Long-Term Care plans
- Short- and long-term disability coverage for full- and part-time employees
- Access to benefits specialists who can explain coverage and help employees choose between plans

## 4. Provide work-life flexibility and equitable benefits. Lever, a recruiting software company, shared that these benefits can include:

- a. **Floating holidays and ample paid time off** — support people of varying cultural and religious backgrounds by offering floating holidays and paid time off to use as they wish. These benefits are also appreciated by working parents who are navigating school breaks and sick children.
- b. **Remote work** — this benefit is advantageous to some candidates from underrepresented groups. For instance, disabled and semi-retired professionals may prefer to work from home to reduce workplace challenges and eliminate an unnecessary commute. Working parents would also benefit, as the time they save traveling to and from the office could be spent with their children instead. In addition, offering remote work allows you to recruit talent from anywhere in the world, giving you a bigger talent pool from which to build a diverse workforce.
- c. **Flexible schedules** — ditching the traditional workday in favor of flexible schedules can also help you attract and retain working parents, older workers, and some disabled professionals.
- d. **Paid parental leave** — Only 38% of U.S. companies offer paid parental leave. This employee benefit may

help you attract working parents looking for a better work-life balance to bond with their new children.

- e. **Professional development** — offering professional development can attract high-potential candidates from different economic and educational backgrounds and help you develop them while increasing your diversity.

## 5. Evaluate job design requirements, job descriptions, and classifications for bias.

Reconsider requirements. A simple way to attract more diverse candidates is to take a second look at what you're asking of them. Focusing only on your ideal, you'll miss out on candidates who fall outside of your dream profile, who can be just as capable, and, more important, bring new perspectives to the table.

Write for a broad audience. Eliminate language that caters to an individual group; for example, remove gender-specific language. Terms can have gendered associations that give applicants the wrong idea. Sometimes, it's adjectives that are seen as "masculine" that cause problems. This list of words to avoid, along with a set of more inclusive alternatives from the LinkedIn article "17 Words that Are Turning Women Away from Your Jobs" ([bit.ly/3x0KMQn](https://bit.ly/3x0KMQn)) is helpful.

You can run your job descriptions through Gender Decoder ([gender-decoder.katmatfield.com](https://gender-decoder.katmatfield.com)) or The Gender Bias Decoder ([www.totaljobs.com/insidejob/gender-bias-decoder](https://www.totaljobs.com/insidejob/gender-bias-decoder)) to check for bias.

## 6. Make sure your Career Page reflects your commitment to DEI.

Ensure the images on your career page reflect diversity. Also include your DEI statement, values, and commitment to DEI on the page. Many candidates want to know where companies stand on DEI before applying to work with them.

Check out Apple's Career Page ([www.apple.com/careers/us/](https://www.apple.com/careers/us/)) for an excellent example of a company career page that reflects their commitment.

## 7. Offer internship opportunities for underrepresented groups.

## 8. Make sure you have a diverse slate of candidates for each opening.

- a. If you only advertise in places that certain candidates will access, you'll only get one type of candidate.
- b. Post available positions on job boards that target diverse candidates.
- c. Social media advertising is also a great way to target candidates you haven't seen applying previously.

# JOB BOARDS

Prospanica: The Association of Hispanic MBAs & Business Professionals

National Association of Black Journalists

National Coalition of Black Meeting Professionals

Ascend: The largest Pan-Asian business professional membership organization in North America

Association for Latino Professionals for America

National Association of Black Accountants

Diversity Jobs

Young Nonprofit Professional Network

WorkplaceDiversity.com

HispanicDiversity.com

VeteransConnect.com

LGBTConnect.com

DisabilityConnect.com

OutandEqual.com

AllDiversity.com

WomensJobCenter.com

BlackJobCenter.com

- d. Highlight your commitment to inclusive hiring in your job posting.

## 9. Conduct interviews through the lens of DEI.

For example:

- a. Ensure diversity on interviewing panels to ensure there are varied perspectives. If so, the group can challenge things like affinity and unconscious bias.
  - i. Educate HR staff hiring managers and interview panels on bias
- b. Strip identifying information from resumes (name, school, dates, address, hobbies, etc.) before sending them to hiring managers and interview panels
- c. Scoring resumes and applications against objective criteria helps to eliminate bias and encourage merit-based shortlisting
- d. Assess competency first before the interview so that the interview panel is confident that every candidate being interviewed is qualified for the position regardless of their past education or experience.
- e. Screen interview questions to ensure inclusive language is being used.
- f. Assess each candidate on their answers in the same way. Have objective criteria for culture fit. Have KPIs or competency-based questions to determine fit vs. feelings or vague attributes.
- g. Have interviewers share feedback with each other only after all have completed their written assessment of the candidate to ensure a fair evaluation.

- h. If a candidate is disabled, make any necessary accommodations.
- i. Making your diversity and inclusivity policies clear at the interview stage is another means of communicating the organization's commitment to equity.

### 10. Gather data, measure results, and progress.

Your organization must first know what your workforce looks like compared with the labor market and inequities based on demographics. Demographic data may include the following:

- Age
- Disability
- Ethnicity/national origin
- Family status
- Gender
- Gender identity or expression
- Generation
- Language
- Life experiences
- Organization function and level
- Personality type
- Physical characteristics
- Race
- Religion, belief, and spirituality
- Sexual orientation
- Thinking/learning styles
- Veteran status

Once data are collected, underrepresented or problematic areas can be identified and addressed. Using DEI data is about understanding the challenges in front of you and pinpointing what is working and what is not.

Once your organization has defined its DEI strategy and goals, you can determine which metrics are most relevant, how to measure and analyze your data accurately, and use the right reporting tools and channels. From there, you can set your KPIs.

Additionally, organizations should measure inclusion, which can be more challenging to assess. As shared in a Harvard Business Review article, Gartner recently developed an Inclusion Index that measures seven critical dimensions of inclusion: fair treatment, integrating differences, decision-making, psychological safety, trust, belonging, and diversity. Gartner Inclusion Index's seven questions provide a holistic view of inclusion in the workplace:

- a. **Fair treatment:** Employees who help the organization achieve its strategic objectives are rewarded and recognized fairly.
- b. **Integrating differences:** Employees at my organization respect and value each other's opinions.
- c. **Decision making:** Members of my team fairly consider ideas and suggestions offered by other team members.
- d. **Psychological safety:** I feel welcome to express my true feelings at work.

- e. **Trust:** The communication we receive from the organization is honest and open.
- f. **Belonging:** People in my organization care about me.
- g. **Diversity:** Managers at my organization are as diverse as the broader workforce.

### 11. Include diverse organizations in community outreach and social responsibilities activities.

Association Headquarters has an active social responsibility effort, aligned with our core values, and supports many local community organizations throughout the year. As a part of our DEI strategy, we are looking at our social responsibility efforts through a DEI lens, ensuring that many of the organizations we are supporting help traditionally marginalized groups.

Additionally, we are exploring new opportunities to support and provide in-kind services to organizations focused on diverse-based populations.

### 12. Ensure diverse staff occupy leadership roles within the organization.

Diversity in leadership has several important benefits. First, it produces better ideas and business outcomes. For organizations to be successful, leadership teams need to fully understand the nuances of their increasingly diverse member/customer base. Having diversity in decision-makers is the key.

Second, it improves employee engagement and retention because representation matters. It's critical for people from underrepresented backgrounds to see people like themselves in positions of power, or they may not see opportunities for advancement and move on. Underrepresented staff may feel more comfortable asking for sponsorship or mentorship from someone who may understand their experience.

*Race to Lead: Confronting the Nonprofit Racial Leadership Gap* found that the lack of diverse leadership:

- a. **Is NOT about differences in background or qualifications:** People of color and white respondents have similar educational backgrounds, positions, salaries, and years working in the nonprofit sector.
- b. **Is NOT about a lack of aspirations.** People of color aspire to be leaders more than white respondents. For those who do not aspire to leadership, most—across race—are looking to maintain work/personal life balance.
- c. **Is NOT about skills and preparation.** Most aspiring leaders thought they had the qualities needed to be a good leader. When asked about the training they

received, people of color and whites had few differences in financial skills, goal setting, articulating a vision, advocacy, and collaboration.

- d. **IS an uneven playing field.** The majority of aspiring leaders feel prepared to take on an executive role.
- e. However, more than one-third reported they want more technical and management skills, with POC respondents identifying this need more often than whites. People of color were more likely than white respondents to see race/ethnicity as a barrier to their advancement.
- f. **IS the frustration of “representing.”** All respondents have challenges, but people of color are significantly more frustrated by the stress of being called upon to represent a community. They are also more challenged by inadequate salaries, the need for role models, lack of social capital/networks, and the need for relationships with funding sources.
- g. **Is NOT personal, it IS the system.** Respondents across races squarely identify the lack of people of color in top leadership roles as a structural problem for the nonprofit sector.

### 13. Recognize and celebrate cultural/religious months and holidays.

Association Headquarters DEI Advisory Council reviewed the holiday calendar and the list of heritage months and decided which we would recognize via our social channels.

Our social media recognition includes single posts for holidays. For heritage months, we post a series of recognitions throughout the month that includes staff testimonials, allyship tips, and spotlights on association leaders from or organizations focused on that heritage.

Internally, we highlight upcoming holidays/heritage months in our all-staff meeting (as part of our monthly DEI update) and explain the significance of unfamiliar holidays. Additionally, our Employee Engagement Committee will coordinate social activities related to heritage months and holidays.

## DIVERSITY CENTRAL PROVIDES A COMPREHENSIVE HERITAGE MONTH GUIDE

There are many online resources for holiday calendars – Kazoo’s Workplace Diversity and Inclusivity D&I Calendar is a good one.

### 14. Start Employee Resources Groups (ERGs) for open discussion, learning, and support.

ERGs are employer-recognized groups led by employee volunteers who aim to foster a diverse and inclusive workplace. Generally designed to bring support to employees, these groups can also help employees come together, offer mentoring opportunities and bring awareness to issues facing specific demographics and marginalized populations.

ERGs may be formed based on a shared identity, affinity, demographic, life stage, or life experience. This includes, but is not limited to: race, religion, ethnicity/nationality, gender, sexual orientation, disability, veteran status, social or economic causes, shared interest, remote workers, caregivers, professional development, or mentoring.

### 15. Create an inclusive workspace.

A few ways to do that include:

- a. Provide a gender-neutral bathroom
- b. Provide a private space for new moms to pump and store breast milk on a regular schedule
- c. Making stuff easy to get to by ensuring universal access goes a long way in making people feel like you care about their well-being and specific needs.
- d. Intentionally consider wheelchair access for tables, doorways, and walkways
- e. Consider the placement of shelves and cupboards for people with different heights
- f. Install levers instead of door handles to accommodate various levels of dexterity
- g. Display labels in Braille
- h. Provide software and hardware for hearing and visually impaired people
- i. Provide customizable lighting and furniture that can be adapted to an individual’s visual and physical needs
- j. Offer built-in control panels to modify the temperature in a space
- k. Allow the ability to close doors, slide panels or use noise-canceling devices to manage distracting sounds
- l. Include signage that provides ease of navigation in a building that is textural, bold and colorful, to help people with visual impairment or declining eyesight

# Strategy, Governing Documents, and the Board

## 1. Develop a DEI statement that aligns with your organization's mission, vision, and core values.

Include the statement on your organization's website.

The statement should be clear on its intent, commitment, and desired outcomes. It should be aspirational and visionary, and it should include the specific actions you plan

to take. Involve other stakeholders, including staff, other volunteers, and members, in developing your statement to ensure alignment and buy-in.

As an example, Association Headquarters' DEI statement is as follows:

**AH strives to live our core value of unified diversity, which we define as a commitment to diversity, equity, and inclusion because it's simply the right thing to do.**

We define diversity as the presence of racial, ethnic, gender, religious, sexual orientation, age, dis/abilities, or other differences within our workplace and community. We define equity as the process of ensuring that processes and programs are impartial, fair, and provide equal possible outcomes for every individual. We define inclusion as the practice of ensuring that people feel a sense of belonging in the workplace.

We aim to exemplify this core value by ensuring diversity, equity and inclusion are firmly embedded in our culture. We strive to be a model and proactive resource for our client partners and the association community as a whole.

### WE WILL LIVE DEI INTERNALLY BY:

- a. Creating an inclusive culture enhanced by personal and professional development on diversity, equity, and inclusion
- b. Recruiting and retaining a diverse workforce
- c. Engaging staff at all levels and dedicating resources to support the ongoing implementation of our DEI initiative

### WE WILL LIVE DEI EXTERNALLY BY:

- a. Serving as a resource and supporting our client partners and the association community in their DEI journeys
- b. Reinforcing our social responsibility efforts to reflect the company's commitment to DEI
- c. Embracing like-minded vendors and client partners



**2. Develop DEI-related strategic goals and objectives that align with organizational goals; regularly assess progress.**

Like the process used for, and in alignment with, your overall strategic plan, develop DEI-related strategic goals and objectives. Determine the resources you will need

(financial and people), the “owners” of each strategic goal (staff, committees, Board, etc.), and the metrics you will use to assess progress.

By way of example, Association Headquarters’ strategic goals and objectives are:

## **GOAL 1**

### **PROACTIVELY CREATE RECRUITMENT AND RETENTION STRATEGIES TO MAINTAIN A DIVERSE WORKFORCE**

- a. Continue to offer and promote professional development and other opportunities throughout AH
- b. Design a plan for recruiting and retaining diverse populations
- c. Ensure HR processes and policies have specific DEI tactics embedded

## **GOAL 2**

### **FIRMLY EMBED DIVERSITY, EQUITY, AND INCLUSION IN OUR CULTURE**

- a. Leverage the DEI Advisory Council until we appoint or hire an individual to serve in a DEI role to ensure the implementation of DEI strategies and serve as a resource on DEI-related issues and concerns
- b. Continue manager-level and all-staff training on DEI topics and measure the effectiveness of such training
- c. Offer opportunities for peer-learning and engagement on DEI
- d. Foster the awareness and celebration of cultural holidays
- e. Incorporate DEI best practices throughout all internal education as appropriate

## **GOAL 3**

### **ASSIST WITH CLIENT ENGAGEMENT IN DIVERSITY, EQUITY, & INCLUSION**

- a. Offer resources, training, and guidance to clients and prospective clients on DEI
- b. Attract and provide management services to diverse based associations that meet our ideal client profile

## **GOAL 4**

### **ENGAGE AN EXTERNAL AUDIENCE ON DIVERSITY, EQUITY, & INCLUSION**

- a. Continue to support community organizations that serve marginalized groups through AH’s social responsibility efforts
- b. Develop a MarCom awareness campaign highlighting AHs and our client partners’ DEI efforts
- c. Share our DEI statement with vendors & other external stakeholders to reflect our commitment to working with like-minded partners
- d. Offer DEI resources and training to the association management community

### 3. Review bylaws to ensure they are DEI-conscious.

According to NEO Law Group's Nonprofit Law Blog, an association board may consider incorporating DEI into their bylaws in the following ways:

- a. **Purpose Statement** — If there is a purpose statement in the bylaws and DEI is part of the organization's mission, including it in the statement will demonstrate that the organization is committed to operating within its mission.
- b. **Selection of Directors** — If the Board is serious about DEI, it must set the tone at the top. Changing the composition of a Board can be difficult and take time, but setting a goal through a provision in the Bylaws, whether aspirational or specific, can tie the organization to said goal.
- c. **Qualifications of Directors** — The organization should be sensitive to who it may be excluding through its qualifications for the position of a Director. These requirements may be necessary for many reasons, but the Board should also consider how those requirements exclude individuals from an array of backgrounds.
- d. **Compensation** — The Board might consider including specific provisions regarding compensation in the Bylaws, such as a statement that the corporation must pay all employees a fair and equitable wage.
- e. **Meetings** — In consideration of the organization's DEI values, a Director's ability to participate in meetings remotely (under state law) should not be discouraged. Such participation may improve the Board's geographical diversity. It might help in the recruitment and retention of a Director who might otherwise have an access barrier in serving as a Director.
- f. **Committees** — If the Bylaws include general descriptions of standing committees, a DEI Committee may be one such committee. By making it an advisory committee instead of a Board committee (which must be composed of only Directors), the DEI Committee itself can maintain a diverse composition and be better positioned to have big picture discussions about the organization's DEI priorities
- g. **Officers** — An organization might consider a Diversity Officer/Vice President to assume DEI oversight responsibilities.

### 4. Develop new policies and procedures related to DEI issues.

These could include:

- a. Workforce protection policies including sexual orientation and gender identity/expression
- b. A non-discrimination policy, including gender identity and sexual orientation

- c. Disability/Accessibility accommodation policy (events, content, etc.)
- d. Harassment policy and process
- e. Retaliation policy
- f. Grievance process with oversight
- g. Confidentiality policy
- h. Inclusive language policy

### 5. Use external experts to conduct regular and ongoing training on essential topics related to DEI and help your organization develop its DEI strategy.

As mentioned above, there are many DEI consultants that can provide training and help develop your DEI strategy. Association Headquarters facilitates DEI strategy sessions, and we have several trusted partners that we, and our client partners, have used for DEI training. Contact Amy Williams, VP of Sales and Consulting and Chair of AH's DEI Advisory Council at [awilliams@ahint.com](mailto:awilliams@ahint.com) for more information.

### 6. Create a board culture that provides a safe, inclusive space.

To create that space, consider providing:

- a. Town halls
- b. Panel discussions
- c. Moderated discussions
- d. Training and development
- e. Anonymous sharing
- f. Self-assessment – for example, Project Implicit's Implicit Association Tests (IAT) is an effective tool to test unconscious bias. It was created by a consortium of researchers from Harvard University, the University of Virginia, and the University of Washington. The IAT is a self-assessment of unconscious attitudes and associations created more than 15 years ago and used by millions of people worldwide.
- g. A culture of accountability whereby board members hold each other accountable for living the organization's DEI commitment

### 7. Acknowledge your organization's problematic DEI-related history, talk about it and take steps to change it, keeping empathy at the core.

For example, in the American Medical Association Equity Plan 2021-2023, the AMA acknowledges that "meaningful progress toward equity in medicine begins by first recognizing the existence of structural racism and then by making an honest effort to understand how profoundly systems of oppression and discrimination can influence the health of our patients."

The Entomological Society of America is changing the common names of two insect species - “gypsy moth” and “gypsy ant” in its Common Names of Insects and Related Organisms List because the use of “gypsy” perpetuates negative ethnic and racial stereotypes.

In 2019, at its 50th Anniversary of Fair Housing commemoration event, the Chicago Association of REALTORS® publicly apologized for the association’s past actions in opposition to housing fairness and equality. It affirmed their current commitment to dismantle the constructs that perpetuate segregation in Chicago and work to ensure fair housing for all.

**8. Recruit for skills, but be proactive in recruiting board members different from the existing Board.**

- a. Re-examine nominating criteria
  - i. Develop and use a skills matrix that focuses on:
    - 1) Group skills
    - 2) Interpersonal skills
    - 3) Personal skills
    - 4) Technical skills
    - 5) Personal attributes

- b. Consider how candidates can add value, not how they check a box
- c. Adapt the call for nominations process
  - i. Use a detailed application with self-assessment
  - ii. Issue a broad call for nominations
  - iii. Use a scoring matrix
  - iv. Conduct Interviews
  - v. Be consistent and transparent in the process
- d. Consider holding non-competitive elections

**9. Provide the structure and support needed for an inclusive volunteer experience.**

Implement a process similar to the board recruitment process for all volunteer opportunities, including committee, task force, and ad hoc assignments.

# Chief Staff Executive

## 1. Be an inclusive leader.

Deloitte's article Six Signature Traits of Inclusive Leadership outlines the six traits of an inclusive leader:

- a. **Trait 1: Commitment** — Highly inclusive leaders are committed to diversity and inclusion because these objectives align with their values and believe in the business case.
- b. **Trait 2: Courage** — Highly inclusive leaders speak up and challenge the status quo and are humble about their strengths and weaknesses.
- c. **Trait 3: Cognizance of bias** — Highly inclusive leaders are mindful of personal and organizational blind spots and self-regulate to help ensure “fair play.”
- d. **Trait 4: Curiosity** — Highly inclusive leaders have an open mindset, a desire to understand how others view and experience the world, and a tolerance for ambiguity.
- e. **Trait 5: Culturally intelligent** — Highly inclusive leaders are confident and effective in cross-cultural interactions.
- f. **Trait 6: Collaborative** — Highly inclusive leaders empower individuals and create and leverage the thinking of diverse groups.

## 2. Make equity a top priority and be directly involved in the DEI efforts.

CEO leadership is an essential component of advancing DEI efforts because of their influence. Every CEO should advocate for the work and be involved in the work. CEOs are uniquely positioned to articulate the vision of change and model how the change will occur. Being involved includes participating in training and becoming more educated on DEI issues.

When determining if CEOs should directly lead DEI initiatives, they should assess this in light of their experience and success in this area. The most impactful work for some CEOs is to let others within the organization lead while advocating and continuing their own personal DEI journey.

## 3. Educate yourself on DEI topics and apply your knowledge to ensure that all perspectives are represented.

Be an advocate/ally for those not represented at the table during staff and board discussions. Encourage others to find their voice and allow them to speak rather than speak for them.

## 4. Establish a shared vocabulary.

Words matter; they can reflect bias or challenge it, bring teams together, or divide them. Ground your organization in shared meaning around diversity and inclusion terms. Many organizations maintain a running dictionary of terms from which to draw when needed. See below for a glossary of terms that can be used as a starting point for developing your own shared vocabulary.

## 5. Create a culture that welcomes sensitive discussions (trust, inclusion, ask tough questions).

In recent years, there has been increased awareness of DEI concerns and other social issues. Many employees and volunteers want to talk about these things and look to the organizations for support. Limiting discussion on these topics may allow inequity to persist in your organization.

To help build trust and create a level of comfort around discussing DEI issues, organizations should offer diversity training and other less formal ways for staff, volunteers, and members to gather and discuss. For example, Association Headquarters has a monthly Brown Bag Lunch for staff to discuss topics related to DEI, such as micro-aggressions, allyship, and inclusion.

Leaders can also build trust by showing an active commitment to diversity initiatives and connecting with employees and volunteers personally. When employees or volunteers are in distress or are passionate about a social issue or event, allow them to express themselves, be an active listener, and acknowledge their feelings. Doing so will show employees and volunteers that they're in an inclusive environment, where they are free to express themselves.

**6. Track the investment in DEI; measure results.**

Creating an inclusive organization is an ongoing process that requires a significant investment of time and financial resources. Organizations that invest in training, data, and feedback gathering and planning are more likely to succeed.

In the beginning stages of DEI work, most organizations invested primarily in consultants to help them articulate their goals and priorities and support them through coaching and mentoring. Organizations then invest in longer-term strategies to infuse DEI more deeply into how the organization operates.

**7. Sign the CEO Action Pledge.**

The CEO Action for Diversity & Inclusion™ is the largest CEO-driven business commitment to advance diversity and inclusion within the workplace. This commitment is driven by a realization that addressing diversity and inclusion is not a competitive issue but a societal issue that CEOs can play a critical role in addressing. Read more on this initiative below.

# CEO **ACT!ON** FOR DIVERSITY & INCLUSION

As a unique collaborative of nearly 2,000 CEOs of the world's leading companies and organizations, we have agreed to take action to cultivate workplace environments where diverse experiences and perspectives are welcomed and where employees feel comfortable and empowered to discuss diversity and inclusion. All the signatories of this commitment are leaders of their companies who agree to implement the pledge within their respective workplaces and to support other companies in doing the same.

Learn more at [www.ceoaction.com](http://www.ceoaction.com).

# Membership

## 1. Offer member training on diversity, equity, and inclusion.

For example, the School Nutrition Association (SNA) has developed member diversity, equity, and inclusion training. The goal of DEI training is to help members become more culturally competent, empathetic, and self-aware. SNA's training series is delivered through webinars, conferences, and SN Magazine articles. It includes a combination of firsthand lived experiences, self-assessments, networking connections, and suggested actions. SNA staff recognized that because members have different levels of education and other job functions, programming that resonates with one person may not resonate with another. By offering different training approaches, they can better meet members' learning needs. They have been successful because the training is sustained, visible and holistic.

## 2. Engage members in DEI outreach efforts.

The Geological Society of America (GSA) recruits the next generation of members through a campus rep program that relies on a volunteer network of members recruiting at minority-serving institutions. The program has more than 600 participants and serves as a pipeline for GSA membership.

Gather testimonials from members to recognize and celebrate heritage months and cultural holidays.

## 3. Gather and measure demographic information; regularly assess results and progress. Explain why you are collecting demographic information.

Use existing opportunities to gather demographic information on your members, for example, on your membership join or renewal form, your conference registration page, and on your call for conference speakers. The key is transparency – members may be hesitant to provide this information if they don't know why you ask. Before asking, explain why you're asking, why the information is valuable, and that it will remain confidential. Don't ask for something that you don't plan to use.

## 4. Gather pronouns and prefix/titles in the database and encourage staff and members to share their pronouns as a part of regular communication.

Update your database so that members can use gender-neutral titles (e.g., Mx.) and pronouns (e.g., they, Ze).

By sharing our pronouns, we encourage others to do the same. Using someone's correct pronouns affirms their

identity and is a fundamental step in being an ally.

It demonstrates that you care about and respect the people in that minority who are questioned about their gender identity.

People who fall outside of the commonly used gender categories have the burden of telling others what their pronouns are. They often struggle when deciding to tell others their pronouns or asking people to use them. A simple solution is to make gender pronouns part of regular communication. For example, you can include them in your email signature, Zoom meeting title, or when introducing yourself in a meeting.

Mypronouns.org provides excellent resources on personal pronouns and why they matter.

## 5. Reflect diversity in membership materials.

Your membership materials should reflect the diversity you want to attain. The models and images in your materials should reflect ethnic, racial, age, gender diversity, and people with disabilities. Seeing diversity can have a powerful effect on individuals' belief that they are welcome in your organization.

## 6. Make sure the member portal is accessible.

Here are some tips for providing an accessible member portal from NimbleAMS, a Community Brands product:

- Alternative text for images: Images have alternative text or alt text, which assistive technologies like screen readers can easily read. The text conveys what the image is about for those that cannot view the image.
- Sufficient color contrast: A sufficient color contrast helps members with vision disabilities, color blindness, or age-related issues view the screen's contents.
- Detectable text on links and buttons: Links and buttons have detectable text that screen readers can easily read. Using this detectable text, users can recognize links and action buttons like Submit, Save, etc.
- Resizable text: When a user resizes text for easy viewing, there is no loss of content or functionality.
- Keyboard accessible: It is ensured that, wherever possible, content can be operated through a keyboard or keyboard interface.
- One main landmark: This helps assistive technologies identify the screen's main body, navigation bar, etc. and ensure they are not mistaken as part of the main body.

- g. Form elements have labels: All form elements or fields that need to be populated with data have a label that the screen reader can read out to let the user know what information is necessary for each field.
- h. User-friendly heading levels: Users can navigate to all headings and information with assistive technologies, including users who cannot use a mouse and use only the keyboard or the ones who use a screen reader.

**7. Ensure volunteer leadership is reflective of the members; provide opportunities for diverse members to get involved.**

Members want to see leaders that look like them. Make sure your Board and committees are reflective of the membership. Provide ample opportunities for diverse members to get involved in ad hoc, committee, and Board volunteer service.

**8. Communicate with members regarding DEI actions/commitment.**

Regularly update members on the organization’s DEI goals and its progress toward achieving the goals.

**9. Design mentorship or sponsorship programs for diversity.**

Prepare both mentors and mentees to participate in the program. Make sure both parties understand the importance of setting mutually agreed-upon goals, being open, and regularly assessing progress. The mentorship program should be a reward for excellence, not a charity or special treatment.

Go beyond a mentorship program and create a sponsorship program. Offer opportunities for members to tap into the position, experience, and influence of other members and help underrepresented members connect with professional networks and have access to career advancement opportunities.

**10. Membership staff should be focused on DEI.**

Staff should look for opportunities to increase diversity and inclusion when recruiting, retaining, and engaging members.

**11. Ensure the association is representative of the industry/profession by targeting recruitment efforts to underrepresented groups.**

Build relationships with colleges and universities to recruit the next generation of diverse members.

Form partnerships and cultivate relationships with diverse-based associations in your industry or profession. Create

collaborative programs and benefits to increase the engagement of traditionally underrepresented professionals in your organization.

**12. Increase inclusion in your award program.**

Help attract, reward, and retain talent in the profession by providing scholarships and other means of financial support for students and young professionals.

Develop awards for students, young professionals, women, people of color, and other traditionally underrepresented groups.

Make sure your other awards are going to diverse recipients. Consider the nomination process and be aware that many groups are, for cultural reasons, uncomfortable with self-nomination.

**13. Establish identity-based member communities.**

Identity-based communities can create more meaningful engagement opportunities that benefit both the group and the organization. These communities guarantee that every member’s voice is respected. Over time, they help associations create benefits and services that better meet the needs of their diverse membership. They enhance the association’s work, develop future leaders, and contribute to innovations in the field.

For example, the International Energy Credit Association (IECA) formed the IECA Professionals for Diversity and Inclusion Group (PDIG), a diverse group of energy professionals from different backgrounds, experiences, cultures, and generations, all coming together to share their unique knowledge and experience.

In 2007, the Society for Information Management (SIM) formed SIM Women, a network inside SIM to promote communication, mentorship, leadership, and career development amongst the female members of SIM.

The American Academy of Hospice and Palliative Medicine (AAHPM) formed its first identity community in 2012 when its LGBTQ Special Interest Group (SIG) was founded. The SIG assisted AAPHM in developing culturally competent practices, and LGBTQ SIG members created education, curated resources, and informed advocacy efforts. Since then, AAPHM has also formed Black Professionals, Patients, and Families Forum; Latinx Professionals, Patients, and Families Forum; and South and East Asian Professionals, Patients, and Families Forum.

# Credentialing Programs

## 1. Form alliances with other organizations to promote diversity and advance industry change.

As shared on the Institute for Credentialing Excellence (ICE)'s website, The National Registry of Emergency Medical Technicians (the National Registry), the nation's emergency medical services (EMS) certification organization, initiated a national effort to identify actionable ways to prevent and eliminate systemic racism and inequality and promote diversity and inclusion in the EMS community. To this end, the Inclusion, Diversity, Equity, and Access (IDEA) in EMS Task Force was created. Led by the National Registry, IDEA comprises representatives from 8 other EMS-related organizations. The coalition is meeting regularly to identify concrete steps for increasing diversity in the field of EMS, including plans for engaging individuals at a young age, promoting the EMS profession as a career opportunity, and developing mentoring opportunities for those interested in pursuing a career in the EMS field.

## 2. Diversify candidate pool by forming alliances with HBCUs.

The National Registry forged new alliances with historically black colleges and universities in a deliberate effort to diversify the pool of candidates for the National Registry's research fellowship program. These alliances are also crucial in expanding recruitment efforts to increase diversity at the organizational level purposefully.

In conjunction with expanding traditional recruitment sources, the human resource staff added a voluntary demographic disclosure to the application process to better track its efforts.

## 3. Ensure digital accessibility (website, LMS, exam platform, etc.).

The W3C Web Accessibility Content Guidelines (WCAG) were established in 2000 as a benchmark of technical digital accessibility, and WCAG 2.0 AA is the adopted and expected level of accessibility. Many websites, tools, products, learning management systems (LMS), and exam delivery platforms do not meet WCAG guidelines. When a digital platform does not meet WCAG standards, reasonable accommodations are provided (in the US). In Europe, actual equitable experiences are required. As shared on ICE's website, according to the International

Association of Accessibility Professionals (IAAP), two cases recently made the news, both tied to the lack of accessible exam content:

The Medical College Admission Test (MCAT) is only offered in person. The Association of American Medical Colleges (AAMC) defers to their illustrations, charts, and graphs, requiring candidates to be physically present at test centers. With the closure of exam centers due to COVID-19, all MCAT Exam offerings for March, April, and May 2020 were canceled. While in-person exams have since resumed, lawmakers questioned AAMC about the safety of their testing. If well-constructed graphics, charts, and tables, designed with accessibility in mind, were available, they would allow for an online or remotely administered exam and allow medical school admissions to continue to reach all candidates, even during a pandemic.

In the second case, a California court has banned the University of California from using the SAT or ACT during the pandemic for financial aid and admissions due to the lack of accessible exams for disabled students. Similar to the MCAT Exam, if the exams had been developed in an accessible manner and on a platform that was accessible, students and schools would not be facing this disruption in the college admissions process.

## 4. Collect demographic data to enable research on exam performance and outcomes based on demographic data.

The board for the American Board of Anesthesiology (ABA) is collecting race/ethnicity data from candidates and diplomates to enable research on exam performance and outcomes based on demographic data. It is conducting a study in collaboration with the Accreditation Council for Graduate Medical Education. ABA is surveying volunteers to establish a baseline for identifying metrics to set goals and track the progress of these efforts.

## 5. Mitigate unconscious bias in exams and item writing process.

Accepting that everybody has implicit biases, the American Board of Surgery (ABS) set out to mitigate bias in its oral exams by implementing strategies and tactics to encourage examiners to be more methodical and data-driven. ABS



has examiners grade on a case-by-case basis immediately after the candidate goes through a case to facilitate their recall. Examiners score candidates independently without discussing their performance with other examiners, and all candidates are held to the same standard. ABS holds its examiners accountable by requiring them to write down candidate performance notes for all their decisions.

#### **6. Provide unconscious bias and inclusion training for the Board, volunteers, and examiners.**

ABS now provides bias training to all examiners and has an ongoing dialogue about bias. The Board primes the examiners by speaking about bias before each exam and includes reading materials on the topic and reminding them of the importance of a fair and equal examination experience.

#### **7. Review job tasks for bias and offensive/discriminatory language.**

Bias in individual test items can result in differences in the performance of candidates of equal ability and thus is considered a validity issue. As such, seek to eliminate bias from job tasks. For example:

- a. Review items for terminology, phrases, idioms, and language that may be sexist, racist, offensive, or discriminatory.
- b. Use gender-neutral terms.
- c. Strive for a balanced representation of various groups in diverse roles.

- d. Use standard, formal English. Avoid slang, idioms, and colloquialisms. Also, avoid obscure language or ambiguous acronyms unless they are standard, recognized terms regarding the subject matter of the assessment.
- e. Be wary of using a condescending tone.
- f. Avoid references to race, ethnicity, gender, age, etc., unless they specifically apply to the question.
- g. Avoid stereotypes. For example, don't assume that all nurses are female and all doctors are male. Present people with disabilities in active, capable, and independent positions. Avoid common racial/ethnic stereotyping.
- h. Make sure your items are reviewed by a diverse group of subject matter experts.

The Board of Certification for Emergency Nursing developed a Policy to Eliminate Bias in Items and Testing Materials.

#### **8. Leverage certification to mitigate disparities and bias in your field or profession.**

For example, The American Board of Anesthesiology is considering how lifelong learning and self-assessment in continuing certification could address issues of racism and bias in clinical care. The Board recently updated its Maintenance of Certification in Anesthesiology (MOCA®) content outline to include health care disparities and DEI and will launch related MOCA Minute® questions this year.

# Programs and Events

## 1. Provide accessibility resources (ASL, transcripts, captions, etc.).

The International Association of Accessibility Professionals (IAAP) provides the following guidance on standard accessibility features that should be provided in all of your productions, programs, and services:

- a. Sign Language Interpreters (live or remote) – Contact the Registry for Interpreters for the Deaf (RID)
- b. Captions
  - i. Learn about captioning with the Described and Captioned Media Program’s Captioning Key
    - 1) Usable captions have standards and are not just text moving on the screen.
    - 2) They include:
      - a) Speaker names
      - b) Grammar and punctuation
      - c) Sound
    - 3) There are display standards
      - a) Two lines of captions at a time
      - b) No more than 32 characters displayed per line
  - ii. Live human captionists provide real-time transcription and are the highest quality for captioning
  - iii. Artificial Intelligence (AI) captions have limited ability to offer correct captioning when unique vocabulary and content is delivered.
    - 1) AI captions are not adept at covering accents.
    - 2) AI captions do not include grammar
    - 3) AI captions do not include speaker names
    - 4) AI captions do not include sound
- c. Live transcript in addition to closed captions
- d. Transcripts for any audio-only content
- e. Audio description for any visual information presented in video or live presentations
- f. Alternative listening systems
- g. Alternative text or text equivalents for not text content
- h. Braille or large text
- i. Reader/Recorder for non-accessible digital courses or people with specific physical disabilities
- j. Notetakers

Additionally, consider offering programming in languages other than English or providing translation services for attendees whose primary language is not English.

## 2. Make sure your registration form gathers inclusivity and accessibility information.

Gather as much information as possible during the registration process. Make sure you fully understand the requested accommodation or take time to clarify before the event. Allow registrants to share additional needs that you may not have considered via an open-ended question on the registration form.

- a. Ask attendees to provide their pronouns so that they can be included on name badges
- b. Include attendees’ dietary needs (ask them to be as specific as possible)
  - i. Beyond allergies or medical restrictions, ask about kosher, halal, and other food needs related to religious practices, particularly for meetings scheduled around religious holidays.
- c. Include sign-language interpreters (ASL, BSL, ISL, etc.)
  - i. Interpreters only sign for 45 minutes at a time and then hand off to another interpreter
  - ii. Interpreters may ask about your attendee’s Deafness (from birth, recent loss, partial)
- d. If you indicate captions will be provided, indicate if they are live captions (CART) or automated captions and if they are closed captions or streaming in a third-party application.
  - i. Live captioning teams will need to have the names and content available to them in advance to best relay the spoken words as captions.

## 3. Provide detailed accessibility information in your registration materials.

Registration materials are where people with accessibility questions will look for information first, and you can save everyone time and confusion by providing detailed relevant information in advance. Clearly explain the accommodations that will be provided and the pertinent venue details.

#### **4. Ensure platforms are accessible to people using assistive technologies (AMS, LMS, registration platform, etc.).**

Make sure the technology platforms you are using to produce your event are compatible with assistive technology, like screen readers. Try using only your keyboard (tab, shift, alt, windows, space, and arrow keys with enter to “select”) to navigate your site and applications’ forms and fields. If you cannot get out of menus or see a highlighted box and form label around every field to enter content, your attendees using assistive technologies won’t know what to do or what they have missed.

To find out more about what’s involved in making your website accessible, go to [www.w3.org/standards/webdesign/accessibility](http://www.w3.org/standards/webdesign/accessibility).

You can also use this web accessibility evaluation tool, WebAIM WAVE (also available as an extension to “turn on” when visiting any page or app), to check out the “back end” of any website. This tool will alert you to about 40% of the errors or alerts on any web page. Manual testing and review should supplement any automated testing.

#### **5. Prepare presenters/speakers on accessibility and inclusion.**

Concerning accessibility, IAAP recommends, among others:

- a. State names first when speaking to identify speakers for captions and audience
- b. Ensure that your presenters describe any information presented visually.
- c. Discourage the default of saying things like, “well, you can see...”
- d. Don’t put too much content on one slide as it reduces the font and can be a challenge to read.
- e. Describe graphs and tables so that if the screen is not magnified or someone is using assistive technology, the attendee can understand the context of the data.
- f. Be prepared to provide alternative text (tagged PDF, large text, or Braille) of any slides or documents shown in virtual events.
  - i. Presenter materials will need to be provided in advance, so you can have them remediated.
  - ii. You’ll need either staff or a vendor to produce alternative media. You will need to plan accordingly to ensure these alternative media resources are available for your attendees before your event.
- g. Concerning diversity and inclusion:
  - i. Review their course content and style for inclusive language, professional content free of personal

beliefs, and potentially sexist, discriminatory, or similarly insensitive language.

- ii. Introduce panelists in a non-sexist manner and avoid visual aids that show people in stereotypical roles.
- iii. Don’t make assumptions about attendees other than they have a common interest in the educational content. Provide your speakers with an accurate profile of their audience
- iv. Ask speakers to use their pronouns when introducing themselves

#### **6. Make sure marketing efforts reflect diversity.**

Are the images and themes of your marketing materials inclusive of all potential participants? Are the colors you’ve chosen appropriate for all audiences, including your international participants?

#### **7. Assemble diverse speakers/panelists.**

- a. Make sure your speakers, learning facilitators, and entertainers reflect both your current audience and those you want to attract.
- b. Ensure you represent different age groups, genders, races/ethnicities, religious traditions, and people of different abilities in your speaker, panelist, and moderator selection.
- c. Have a moderator for panel discussions to ensure everyone gets an equal opportunity to speak.
  - i. Use [www.arentalkingtoomuch.com](http://www.arentalkingtoomuch.com) to ensure balanced participation from male and female panelists.

#### **8. Offer inclusive food and beverage selections.**

- a. Food choices should accommodate the needs of people with allergies or who observe other dietary restrictions. Organizations should always provide dairy-free, gluten-free, halal, kosher, vegetarian, vegan, and nonalcoholic options.
- b. Ensure venue staffers have trained appropriately in avoiding cross-contamination of preparation and serving pieces (e.g., separating meats and cheeses for attendees who keep kosher).
- c. Make sure buffet food options are labeled with ingredients.
- d. Consider how you will accommodate attendees’ related needs if your meeting is over Ramadan or another period of religious fasting.
- e. Consider whether all social and networking events must include alcohol, as this can contribute to whether a prospective event attendee feels safe and included.

**9. Develop an event code of conduct and practices to cultivate a welcoming and inclusive space and share it with attendees in advance.**

Keeping participants safe should be a priority. A code of conduct establishes event rules and guidelines, so attendees know what they are and are not expected to do. Here is a sample code of conduct from JavaScript Conferences.

**10. Avoid scheduling conflicts with religious holidays.**

Pay attention to conflicts with all major religious holidays, not just Christian ones.

**11. Choose inclusion meeting venues and locations.**

- a. Choose meeting venues that provide disability accommodations beyond the minimum of compliance with the Americans with Disabilities Act. For example:
  - i. Meeting rooms, restrooms, or other rooms open to the public have no doors or push panel door openers for ease of access
  - ii. All meeting space is wheelchair accessible
  - iii. Guest rooms are accessible
  - iv. Gender-neutral bathrooms are available
  - v. There is a nursing room, prayer room, and quiet room available for attendees
  - vi. The venue has at least some staff who know American Sign Language
  - vii. Menus and other print materials are available in Braille
- b. Consider whether the destination itself is accessible and inclusive
  - i. Does the city have an office that monitors Americans with Disabilities Act compliance?
  - ii. Are public transportation and cabs accessible for attendees with disabilities, including those who use mobility devices?
  - iii. Does your choice of geographic location mesh with your official statement on DEI?
    - 1) Has the city, state, or country passed, or are they considering exclusionary laws?
    - 2) Will that prevent people who want to attend from attending?

**12. Consider registration scholarships/reduced rates.**

To ensure your event is economically accessible and open to everyone, consider providing need-based scholarships. Establish the criteria people must meet to qualify and promote these opportunities.

**13. Provide staff/volunteer assistance resources on-site.**

- a. Staff or volunteers should be assigned to make sure accessibility and inclusion efforts are implemented on-site. There should be one dedicated point of contact overseeing the efforts.
- b. Identify them with nametags
- c. Encourage them to offer help verbally
  - i. Train your staff and volunteers to never touch someone, regardless of your intentions, without clear consent.
  - ii. Even if someone appears to need your help, ask first.
- d. Ensure that emergency plans cover safety issues for people with disabilities.
- e. Have someone check that food is appropriately labeled and that meeting spaces and functions are accessible.
- f. Seek out volunteers with special skills, like fluency in American Sign Language.
- g. Provide plenty of signage, which is especially helpful in making your event accessible. Pay attention to the size and color of the type on the sign.
- h. Be mindful of pathways. Ensure there is enough space for a wheelchair to navigate. Consider obstructions that may block paths (e.g., trash cans, wires, unlevel surfaces).

**14. Measure your results and ask for feedback.**

Gather demographic information from attendees, speakers/panelists, and other key stakeholder groups (i.e., sponsors and exhibitors, planning committee volunteers, etc.) so that you can measure progress in creating a more inclusive and accessible event. Ask attendees to provide feedback on their event experience and look for opportunities to improve your inclusivity efforts further.

# Marketing and Communications

## 1. Ensure your messaging and graphics reflect the membership or the diversity you hope to achieve.

- a. Your membership materials should visually reflect the diversity of your membership or the diversity you want.
- b. Ensure the models and images you use in your marketing materials reflect ethnic, racial, age, and gender diversity as well as people with disabilities.
- c. Don't use stock photos if real photos of your members or stakeholders are available to represent your messaging. If you use stock photos, look for realistic images that feature people with different backgrounds and abilities (race, body type, physical ability, age).
- d. Be honest about your current demographics. For example, if most of your members are over 50, don't choose photos exclusively of young people to entice younger members. Find a way to build a program that will attract new demographics authentically.
- e. If you have marketing personas used to target your marketing efforts, ensure the personas are diverse and inclusive.

## 2. Ensure your website is accessible.

- a. The Web Accessibility Initiative has web content accessibility guidelines.
- b. A few examples of web accessibility include:
  - i. **Alternative Text for Images:** Images should include equivalent alternative text (alt-text) in the markup/code. If alt text isn't provided for images, the image information is inaccessible, for example, to people who cannot see and use a screen reader that reads aloud the information on a page, including the alt text for the visual image. When equivalent alt text is provided, the information is available to people who are blind, as well as to people who turn off images (for example, in areas with expensive or low bandwidth). It's also available to technologies that cannot see images, such as search engines.
  - ii. **Keyboard Input:** Some people cannot use a mouse, including many older users with limited fine motor control. An accessible website does not rely on the mouse; it makes all functionality available from a keyboard. Then people with disabilities can use assistive technologies that mimic the keyboard, such as speech input.

- iii. **Transcripts for Audio:** Just as images aren't available to people who can't see, audio files aren't available to people who can't hear. Providing a text transcript makes the audio information accessible to people who are deaf or hard of hearing and search engines and other technologies that can't hear. It's easy and relatively inexpensive for websites to provide transcripts, and there are also transcription services that create text transcripts in HTML format.

## 3. Similarly, ensure your content is accessible:

- a. Use built-in organization and templates in document/office suites.
- b. Use headers to create a table of contents in a document to provide navigation for assistive technology automatically.
- c. Use slide masters in slide decks to automatically provide read-order and navigation for assistive technology.
- d. Use built-in accessibility checkers in Office Suites (documents, slides, spreadsheets).
- e. Use Adobe Accessibility Checker.
- f. Follow these design recommendations as recommended in Event Brite's guide "The Basics of Event Accessibility: How to Create a More Accessible Event":
  - i. Use primary, clear, non-technical language in the active voice.
  - ii. Keep your sentence short—one thought per sentence, under 25 words.
  - iii. Use bulleted or numbered lists to break up instructions wherever possible
  - iv. Use a sans-serif font like Helvetica, Arial, Calibri, or Futura. Don't mix up your font too much.
  - v. For printed materials without a lot of text, use bold-face type.
  - vi. Make sure the type is at least 16-point, and line spacing is 1.5 or double.
  - vii. Avoid using all caps and underlining text.
  - viii. Left-justify your text.
  - ix. Use opaque, non-glossy colors and materials for both background and text.
- g. Learn more about universal design at [Section508.gov](http://Section508.gov).

#### 4. Incorporate conscious/inclusive language in content.

- a. Consider voice and tone to create more welcoming and inclusive content. Make sure your content fosters a sense of belonging for everyone, rather than emphasizing differences.
- b. Using person-first language, which emphasizes that the person is more important than the disability. For example, say “person with a disability” rather than using expressions like “handicapped” or “challenged.”
- c. Likewise, don’t use words like “suffers” or “victim” when talking about a health condition. Say something like “he has a mental illness” rather than “he suffers from mental illness.”
- d. Scrub your content of racist metaphors, language, and bias - Often, we aren’t aware that metaphors, words, or phrases have racist origins. This blog post from JD Supra’s website lists a few examples of words and phrases that do.
- e. Only mention differences/demographics when relevant. Marital status, age, sexual orientation, racial and ethnic identity, or a person’s disability should not be mentioned unnecessarily.

#### 5. Ask the preferred terminology when possible.

Avoid labeling people whenever possible. If you must use a label, use their preferred terminology, which may change over time. For example, one person with a visual disability may prefer “blind,” while another person with a similar disability may prefer “person with low or limited loss of vision.” As another example, rather than American Indian or Native American, many groups prefer to be referred to by their tribal name, for instance, “... members of the Cherokee tribe.”

#### 6. Amplify diverse voices in your communication efforts when possible.

- a. Consider diversity, equity, and inclusion when selecting individuals for quotes and other appearances in the media.
- b. Ensure diverse authors/contributors are included in your publications.
- c. Highlight diverse voices and stories on social channels to demonstrate your organization’s commitment to DEI.

**Consciousstyleguide.com** provides style guides covering terminology for different communities and articles on usage. Similarly, **Diversitystyleguide.com** brings together definitions and information from more than two dozen style guides, journalism organizations, and other resources.

#### 7. Offer content in other languages besides English

The US Census Bureau reports that more than 60 million residents over age 5, or about 20% of the US population, speak a language other than English at home. According to Babbel, the language learning app, out of the world’s approximately 7.8 billion inhabitants, 1.35 billion speak English. The majority aren’t native English speakers, however. About 360 million people speak English as their first language. The most common first language is Chinese, followed distantly by Spanish, and then, in third, comes English.

Based on these statistics, an organization striving for inclusivity should consider offering its content, resources, and programming in languages besides English.

#### 8. Regularly communicate with stakeholders on DEI related topics.

Include articles on diversity in your publications and presentations on the topic at meetings. Doing so confirms your commitment to DEI and provides information and resources to help your members in their own DEI efforts.

# Advocacy Efforts

## 1. When conducting Capitol Hill fly-in events, have a diverse group of members participate.

Members of Congress want to hear from people across different socio-economic backgrounds, ethnicities, religions, regions, and other distinguishable factors. Presenting a diverse coalition of people and conveying the widespread impact on society can greatly affect showcasing the necessity to enact policy change and can directly relate to whether or not a legislator supports or opposes a piece of legislation.

## 2. Be mindful of antitrust implications.

According to Pillsbury Winthrop Shaw Pittman LLP, even though it is unlikely that advocacy related to DEI initiatives would seek laws and regulations that limit competition, nonprofit organizations participating in such efforts in nearly all cases would not have any antitrust concerns. Nearly all such efforts are immune from antitrust scrutiny under the *Noerr-Pennington* doctrine, which protects advocacy efforts to influence government policy on any matter, even if the goal is to use government policy to reduce competition. This protection extends to efforts to influence both legislation and administrative rulemaking and enforcement.

## 3. Increase the diversity of government affairs staff.

The Public Affairs Council survey showed that only 17% of government affairs staffers are people of color and that 23% report no people of color on their teams at all. When asked to rate their profession in terms of racial and ethnic diversity on a scale of 0 to 100, respondents gave themselves a 30. Almost two-thirds (61%) said that the perceived lack of diversity in the field discouraged people from entering the field.

## 4. Advocate to advance equity.

Rally stakeholders to advance your organization's DEI goals or support initiatives that advance diversity. Go farther and support or oppose bills to advance equality.

## 5. Build a diverse list of advocacy stakeholders.

If your advocacy supporters list is not diverse, consider outreach to diverse segments of your profession/industry to add new supporters.

## 6. Form partnerships to advance DEI.

Form partnerships with other organizations to amplify their DEI-related advocacy efforts. In the Public Affairs Council study, 50% of those who responded partnered to advance DEI, and 20% considered it. In almost half the cases (46%), organizations chose to partner with an association or a nonprofit, and in almost a third (29%), government affairs played a primary role in creating the partnership.

## 7. Messaging and materials

The materials and messaging you use in communications should reflect a diverse audience. When your advocates see your communicate, they should see themselves.

## 8. Story banking

Stories from your supporters and their experiences with diversity, equity, and inclusion can be a powerful way to add to the conversation. You can collect these stories, curate them and use them when the time is right.

## 9. Leverage PACs

Another way that government relations teams can play a role in DEI efforts is through their political action committees. Consider supporting diverse members of Congress and candidates. Support candidates that support your DEI policy positions.

# Vendors and Suppliers

## 1. Share your organization's commitment to DEI with your vendor partners, let them know you want to work with like-minded suppliers that are also committed to DEI.

Many organizations have preexisting relationships and dependencies on vendors, especially large ones, that are not owned by people from marginalized groups. You can advocate for those vendors to improve their DEI numbers by communicating its value to your organization as one of their customers.

## 2. Request that service delivery comes from staff members from underrepresented groups.

For example, your organization may have a long-term agreement for legal services with a law firm that has only white partners. Rather than declare this a loss for your DEI goals, request that only POC counsel represent you. If this requires them to hire more POC lawyers, you've not only made progress towards your own goals but also supported the vendor to improve on theirs.

## 3. For vendors that supply products, you can use Survey Monkey's The Vendor Workforce Diversity template for information about employee experience, representation across all levels of the vendor organization, and their strategies for DEI.

Data from the survey can be used to develop purchasing benchmarks.

## 4. Include certified diverse businesses in your RFP process.

The following organizations offer certification:

- a. Minority-owned business
  - i. National Minority Supplier Development Council (private certification)
  - ii. Small Business Association 8(a) Business Development Program (sba.gov) (government program)

- b. Women-owned businesses
  - i. Women's Business Enterprise National Council (WBENC) (private certification)
  - ii. Women-Owned Small Business Federal Contracting Program (sba.gov) (government program)
- c. LGBT-owned businesses
  - i. National LGBT Chamber of Commerce's LGBT Supplier Diversity Initiative (private certification)
- d. Veteran-owned businesses
  - i. Vets First
  - ii. National Veteran Business Development Council (NVBDC) (private certification)
- e. Disabled-owned businesses
  - i. Disability:IN (private certification)

Local and state governments may also offer programs that verify minority-, women-, veteran-, LGBTQ-owned businesses as well as businesses owned by people with disabilities.

## 5. Don't be afraid to ask DEI-related questions.

Just because your organization has work to do on DEI doesn't mean you can't ask your vendors about their efforts. All DEI efforts are a work in progress, and if a vendor is resistant to your inquiry, that suggests they may not be a great partner.

Vendors have an interest in providing the information you need to establish and maintain a successful relationship. Like cost or service options, DEI is just another lens for your decision-making.



# Industry or Profession

**1. Leading the way on DEI in your industry or profession is a smart strategy for remaining relevant to members and ensuring long-term success and a robust talent pipeline in the industries and professions associations represent.**

**2. Partner with other organizations in your field to accelerate your progress by combining resources and broadening your reach.**

As an example, the Institute of Management Accountants (IMA) formed partnerships with two other associations: The Association of Latino Professionals for America (ALPFA) and the National Association of Black Accountants (NABA). As a result of the partnerships, IMA grew its membership, promoted its credential, and advanced DEI in the accounting profession. At the same time, ALPFA and NABA benefitted from access to IMA's resources.

**3. Develop resources for your members on important DEI topics.**

For example, the American Institute of CPAs developed a Recruitment and Retention Toolkit to help its members understand how recruiting and retaining a diverse workforce can help them better achieve their companies' overall talent recruitment and retention goals.

The Coalition for Diversity & Inclusion in Scholarly Communications, a coalition of 13 societies and associations whose mission and membership are related to scholarly communications, has published toolkits – Antiracism Toolkit for Organizations and Antiracism Toolkit for Allies – for the scholarly publishing community.



**4. Acknowledge the Implicit Bias and Discrimination that may exist within your profession or industry.**

Develop resources and guidance to help members eliminate bias and discrimination.

The American Medical Association (AMA) established the AMA Center for Health Equity, which works to embed health equity across the AMA organization so that health equity becomes part of the practice, process, action, innovation, and organizational performance and outcomes.

Similarly, as a part of its DEI Strategic Plan, the American Occupational Therapy Association (AOTA) developed AOTA's Guide to Acknowledging the Impact of Discrimination, Stigma, and Implicit Bias on Provision of Services.

**5. Tap into student chapters for those considering your industry/profession.**

Teaching students about the importance of diversity and inclusion before their careers begin is essential to make strides on this critical issue.

**6. Offer DEI scholarships to students interested in pursuing careers in your industry or profession.**

For example, Association Headquarters will soon be launching a DEI scholarship for individuals from underrepresented racial and ethnic backgrounds, gender identities, sexual orientations, or disabilities who are pursuing a nonprofit management or related degree from a college, university, or trade/technical school in the South Jersey/Philadelphia region.

**7. Offer a grant or funding to support initiatives and programs seeking to increase DEI in the field/profession.**

For example, the ASAE Research Foundation offers The Sal Martino Grant for DEI Research, which provides up to \$15,000 to one meritorious proposal (per cycle) addressing DEI in nonprofit membership and member-serving organizations management. The grant supports the research activities of those working (or matriculating) in an academic community, association management professionals, and consultants/private contractors in association management.



# Glossary of Terms

**THE GLOSSARY OF TERMS INCLUDED HERE IS JUST A STARTING POINT AND IS GLEANED FROM THE FOLLOWING SOURCES:**

[equityinthecenter.org/wp-content/uploads/2020/09/Awake-to-Woke-to-Work-Glossary-of-Terms-.pdf](http://equityinthecenter.org/wp-content/uploads/2020/09/Awake-to-Woke-to-Work-Glossary-of-Terms-.pdf)

[www.catalyst.org/2019/05/30/12-diversity-inclusion-terms-you-need-to-know/](http://www.catalyst.org/2019/05/30/12-diversity-inclusion-terms-you-need-to-know/)

[www.catalyst.org/2021/04/01/racial-equity-terms/](http://www.catalyst.org/2021/04/01/racial-equity-terms/)

**ALLY** Advocates for people from underrepresented or marginalized groups. An ally takes action to support people outside of their group.

**ANTIRACISM** Proactive efforts to root out racism within communities, organizations, and yourself while also advocating for equity, inclusion, and justice.

**BIAS** “A preference in favor of, or against a person, group of people, or thing. These initial human reactions, which are often unconscious, are rooted in inaccurate information or reason and are potentially harmful.” (National Museum of African American History & Culture)

**CISGENDER** A term used to describe people whose gender identity matches the sex they were assigned at birth—often abbreviated to cis.

**DIVERSITY** Psychological, physical, and social differences that occur among individuals, including but not limited to race, ethnicity, nationality, religion, socio-economic status, education, marital status, language, age, gender, sexual orientation, mental or physical ability, and learning styles.

**DOMINANT CULTURE** Dominant culture in society refers to the established language, religion, values, rituals, and social customs on which the society was built. It has the most power, is widespread, and is influential within a social entity, such as an organization, where multiple cultures are present. An organization’s dominant culture is heavily influenced by the leadership and management standards and preferences of those at the top. In this context, dominant culture refers specifically

to the American context in which organizational culture is predominantly defined by white men and white women in positional power. See also “White Dominant Culture.”

**EMPLOYEE RESOURCE GROUP** Voluntary, employee-led groups that foster a diverse, inclusive workplace aligned with organizational mission, values, goals, business practices, and objectives. Often, these groups support staff who formally or informally lead race equity work in some capacity within an organization.

**EQUALITY** Treating everyone the same way, often assuming that everyone starts on equal footing or with the same opportunities.

**EQUITY** Working toward fair outcomes for people or groups by treating them in ways that address their unique advantages or barriers. The principle of equity acknowledges that there are historically underserved and underrepresented populations and that fairness regarding these unbalanced conditions is needed to assist equality in the provision of effective opportunities to all groups.

**ETHNICITY** “The multiplicity of beliefs, behaviors, and traditions held in common by a group of people bound by particular linguistic, historical, geographical, religious, or racial homogeneity.” (Canadian Race Relations Foundation)

**IMPLICIT BIAS** Refers to the attitudes or stereotypes that affect our understanding, actions, and decisions unconsciously. These biases encompass both favorable and unfavorable assessments and are activated involuntarily without an individual’s awareness or intentional control



# Glossary of Terms **continued**

**INCLUSION** The Act of creating environments in which any individual or group can be and feel welcomed, respected, supported, and valued to fully participate and bring their whole, authentic selves to work. An inclusive and welcoming climate embraces differences and respects all people's words, actions, and thoughts.

**MICROAGGRESSION** The everyday verbal, nonverbal, and environmental slights, snubs, or insults, whether intentional or unintentional, which communicate hostile, derogatory, or negative messages to target persons based solely upon their marginalized group membership.

**NEURODIVERSITY** The concept that there is great diversity in how people's brains are wired and work and that neurological differences should be valued in the same way we value any other human variation.

**NON-BINARY** (also known as Genderqueer) A category for a fluid constellation of gender identities beyond the woman/man gender binary.

**PRIVILEGE** Benefits and advantages that come to a person solely from being a member of a group. Privilege is often not what you are given, but the hurdles and barriers you don't have to negotiate or overcome.

**RACE** "A socially constructed system that categorizes humans largely based on observable physical features (phenotypes), such as skin color and ancestry. There is no scientific basis for or discernible distinction between racial categories." (The Annie E. Casey Foundation)

**RACIAL JUSTICE** "The systematic fair treatment of people of all races, resulting in equitable opportunities and outcomes for all." (The National Education Association)

**RACISM** A system of advantage and oppression based on race. A way of organizing society based on dominance and subordination based on race. Racism penetrates every aspect of personal, cultural, and institutional life. It includes prejudice against people of color and exclusion, discrimination against, suspicion of, and fear and hate of people of color.

**STRUCTURAL/SYSTEMIC RACISM** The arrangement of institutional, interpersonal, historical, and cultural dynamics in a way that consistently produces advantages for whites and chronic adverse outcomes for people of color. It illuminates that racism exists without the presence of individual actors because it is systemically embedded. When the United States was founded, racist principles were codified in governance structures and policies. As a result, racism is embedded in institutions, structures, and social relations across American society. Today, structural racism is composed of intersecting, overlapping, and codependent racist institutions, policies, practices, ideas, and behaviors that give white people an unjust amount of resources, rights, and power while denying them to people of color.

**SYSTEMIC OPPRESSION** Occurs when institutions discriminate against groups over time and generations.

**UNCONSCIOUS BIAS** An implicit association, whether about people, places, or situations, is often based on incorrect, inaccurate, or incomplete information and includes the personal histories we bring to the situation.



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