The DBP Inclusion Index application is sectioned into three topic areas: Transparency and Demographics, Best Practices in Recruitment, Retention, and Advancement and Company Culture, the weighting of each is evaluated and set every year.
### Inclusion Index: Data/Research on the Impact of Inclusion Recruitment/Retention

#### Employee Resource Group (ERG) Management

<table>
<thead>
<tr>
<th>Requirement</th>
<th>All Participants</th>
<th>Index</th>
<th>Leading</th>
</tr>
</thead>
<tbody>
<tr>
<td>Require diverse interview slates</td>
<td></td>
<td></td>
<td>90%</td>
</tr>
<tr>
<td>Require internal recruiters to explain absence of diverse candidates on slate</td>
<td>50%</td>
<td>65%</td>
<td>84%</td>
</tr>
<tr>
<td>Require hiring managers to explain decision NOT to hire diverse candidate</td>
<td></td>
<td>61%</td>
<td></td>
</tr>
<tr>
<td>Require candidates be interviewed by diverse panel of interviewers</td>
<td></td>
<td>42%</td>
<td></td>
</tr>
<tr>
<td>Provide training for hiring managers in inclusive interviewing skills</td>
<td></td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>Provide training for internal recruiters in inclusive interviewing skills</td>
<td></td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>Select search/recruitment companies based upon ability to provide diverse slate of candidates</td>
<td></td>
<td></td>
<td>100%</td>
</tr>
</tbody>
</table>

#### ERG participation

- **All corporate executives**
  - All Participants: 48%
  - Index: 48%
  - Leading: 51%
- **All senior managers**
  - All Participants: 39%
  - Index: 39%
  - Leading: 46%
- **All managers**
  - All Participants: 35%
  - Index: 36%
  - Leading: 40%
- **All non-managers**
  - All Participants: 22%
  - Index: 24%
  - Leading: 29%

#### ERG executive sponsors’ effectiveness considered during annual performance review

- All Participants: 36%
- Index: 55%
- Leading: 65%

#### Organizations that...

- Provide learning and/or talent development programs specifically for ERG leaders
  - All Participants: 61%
  - Index: 78%
  - Leading: 84%
- Consider holding an ERG leadership position as part of annual performance review
  - All Participants: 65%
  - Index: 84%
  - Leading: 100%
- Consider ERG leaders a separate talent pipeline in succession planning process
  - All Participants: 14%
  - Index: 19%
  - Leading: 23%
- Have individual mission statements, charters, or rules of governance for ERGs
  - All Participants: 85%
  - Index: 96%
  - Leading: 100%
Inclusion Index: Data/Research on the Impact of Inclusion Advancement

Programs designed to help women advance their careers continue to be recognized as important by Index and Leading Organizations – especially formal mentoring, sponsorship and executive succession planning.

- Note the higher usage rates at Index and Leading organizations.
- Also note the low levels of sponsorship, where senior executives advocate for employees.

![Bar charts showing usage rates for different groups: White Women, Black Women, Latinas, Asian Women, Other Women.]
Inclusion Index: Data/Research on the Impact of Inclusion Culture

Accountability

Holding managers accountable at all levels works! While the number of Index and Leading organizations is higher, there is significant room for improvement.

Managers held accountable for management of D&I as part of annual review process: 53% (All), 82% (Index), 100% (Leading)

The following (as they relate to D&I) are part of performance review process:

- Employee satisfaction (as measured in employee surveys): 41% (All), 63% (Index), 84% (Leading)
- Feedback obtained from a 360-degree process (multi-rater or multi-source feedback): 31% (All), 49% (Index), 58% (Leading)
- Succession planning for and advancement of women, black, Latino/Latina, Asian, or other under-represented employees, such as LGBTQ, people with disabilities or veterans: 31% (All), 51% (Index), 87% (Leading)
- Participation in internal or external activities, such as ERGs, D&I events and education: 41% (All), 63% (Index), 77% (Leading)
- Participation in community initiatives, organized either internally or externally: 29% (All), 45% (Index), 81% (Leading)
- Participation on diverse interview panels: 23% (All), 36% (Index), 42% (Leading)
- Developing high potential women, black, Latino/Latina, Asian or other under-represented employees: 33% (All), 53% (Index), 84% (Leading)
- Attaining/maintaining specific hiring and retention rates for women, black, Latino/Latina, Asian or other under-represented employees: 29% (All), 47% (Index), 81% (Leading)

Compensation

More frustrating is that only 58% of Leading organizations tie compensation to D&I results, which may be cause for lack of demographic movement.

Organization compensates managers for D&I results:

- All: 24%
- Index: 37%
- Leading: 58%

Supplier Diversity

- Organization has a formal supplier diversity program: 71% (All), 86% (Index), 90% (Leading)
- Organization has an individual responsible for supplier diversity: 67% (All), 84% (Index), 90% (Leading)
- Organization sets specific supplier diversity goals: 50% (All), 66% (Index), 81% (Leading)
D&I Structure

Is D&I represented by an individual of recognized power and influence at the highest levels?

**Organization has a designated individual responsible for D&I:**
- All Participants: 95%
- Index: 99%
- Leading: 100%

**That individual is the:**
- CEO: 1%
- Corporate Executive: 59%
- Senior Manager: 29%
- Manager: 6%

**Organization has an executive diversity council:**
- All Participants: 81%
- Index: 95%
- Leading: 94%

**CEO chairs executive diversity council:**
- All Participants: 24%
- Index: 30%
- Leading: 34%

**The organization’s most senior D&I executive reports to:**
- CEO: 22%
- Direct report of the CEO (1 level below CEO): 35%
- Direct report of a direct report of the CEO (2 levels below CEO): 29%
- Other: 8%
Inclusion Index: Data/Research on the Impact of Inclusion Transparency

Representation

**Male vs. Female Employee Pipeline**

- Male: 70%, Female: 51%
- Managers: Male = 65%, Female = 59%
- Senior Managers: Male = 35%, Female = 41%
- Corporate Executives: Male = 30%

**White vs. Non-white Employee Pipeline**

- White: 80%
- Asian: 65%
- Latino/a: 30%
- Black: 20%
- Other: 0%

All participant data
Recruitment/Retention
Traditional pathways to work are changing

The higher education system as it is now structured will disappear or be transformed because of unsustainable costs and limited job opportunities for graduates. (McKinsey). To top it off, corporations are increasingly reporting graduates entering the workforce are not job ready.

An emerging blend of innovative, non-traditional certification, apprenticeship, and distance accessed learning opportunities are changing the nature of job preparation and skills development. These efforts are focused on developing the pipeline sooner - many starting as early as elementary and middle school.

A shift in focus from degree to skills development has the potential to help level the playing field for underrepresented populations by increasing opportunities and access to less expensive and shorter-term - and often subsidized - skills development options.

Second Chancers
- In the U.S., 70 million people have an arrest or conviction record that will show up on a criminal background check—that’s 1 in 3 people. Each year, 650,000 to 700,000 people re-enter society from the criminal justice system. The majority are unable to gain employment
- Nationwide, 35 states and over 150 cities and counties have already adopted ‘ban the box’ legislation with the goal of removing bias and stigma associated with this population.

Opportunity Youth
- It is estimated that there are anywhere from 3 million to 7 million opportunity youth -- young people ages 16 to 24 who are neither in school or work -- across the country. Most are black or Hispanic. For employers vying for talent in a competitive economy, workers who are young and motivated are a vital and overlooked resource. It is estimated the nation would save $93 billion annually if opportunity youth were connected to careers.

Disabilities
- The National Employment Team: Working with employers to get individuals with disabilities work-ready and hired

Non-Degreed
- Current trends provide an opportunity to re-examine jobs and the skills that are needed to perform them - and whether a degree is a prerequisite. Placing high value on this factor unconsciously discriminates against candidates who may lack access to post secondary education, but who are otherwise well-prepared to perform the job. In a national survey of HR executives, 90 percent reported their company is open to accepting candidates who don’t hold a four-year college degree.
- In 2018, Glassdoor compiled a list of 15 top companies that offer high-paying jobs that don’t require candidates to have a college degree: Google, EY, Penguin Random House, Costco, Whole Foods, Hilton, Publix, Apple, Starbucks, Nordstrom, Home Depot, IBM, Bank of America, Chipotle, and Lowes

Engage Older Workers

Tap into New/Inclusive Talent Pipelines

Diversity Best Practices
Microsoft’s Autism Hiring Program attracts and supports talented candidates on the autism spectrum throughout the interview and hiring process. Company leaders recognized individuals on the autism spectrum often have unique talents and abilities that they may not be able to express during the traditional interview process. To access this talent pool, the company leveraged the expertise of its internal team and worked with a number of partners. Those partners included Specialisterne, PROVAIL (local community provider), the federal Vocational Rehabilitation program’s National Employment Team (NET) and Disability:IN to revise their interview process to be more inclusive to individuals on the spectrum. In the new one-week working interview, candidates showcase their unique talents and meet hiring teams while learning about Microsoft as an employer of choice. During the week they are on site, each candidate is supported by a job coach to help them connect with the workforce and prepare for the interview. The company has had success hiring in technical roles such as; Software Engineer, Service Engineer, Build Engineer, Lab Engineer, Data Analyst or Data Scientist. The NET assisted in sourcing qualified candidates from across the country. This is an excellent example of a private-public partnership that has resulted in the employment of over 100 individuals on the spectrum that have been recruited from across the country. For those candidates that are offered a position and become a Microsoft employee, the program also provides Autism in the Workplace training and multiple mentors to support the employee as they build their career at Microsoft.
**Embed Inclusion in Onboarding**

**Lever** includes a diversity and inclusion session as part of its onboarding program for new employees. The purpose of the training is not really instructional, but rather to communicate why the company genuinely cares about being an inclusive workplace and what that means at Lever. The session deliberately excludes extensive teaching or information sharing (like what is privilege, what are the latest diversity and inclusion issues in tech, what are all the statistics, etc.) to avoid making the session overwhelming and possibly discouraging new hires from exploring further. However, Lever does include some things the company wants all employees to be aware of, such as what a microaggression is, and what an inclusive environment looks like. After the onboarding session, the company follows up with the new employee with an email and links to resources to learn more. Lever also has an active slack channel #inclusion where people post D&I related articles and have continued discussions.

(Source: Lever)

**MBX Systems**, a computer hardware manufacturer, takes a unique approach to employee onboarding. The company established a monthly in-house book club as part of the new-employee orientation process, to discuss *The First 90 Days: Proven Strategies for Getting Up to Speed Faster and Smarter* by Michael D. Watkins. Book club members include new employees and current employees who are undergoing changes in their job roles. Prior to their first day at work, new employees receive a copy of the book and a welcome letter that explains how the book club works. It takes three monthly meetings to get through the book’s 10 chapters, all of which include checklists and exercises that can be used for discussion and self-study. Over company-provided lunches, members discuss chapters they have read—on, for example, building personal credibility, learning supervisors’ different communication styles and creating a productive relationship with a new boss. Participants are encouraged to discuss the book with their supervisors to practice what they have learned.

(Source: SHRM)
Embed Inclusion in Onboarding

L’Oréal launches HR app to help new hires embrace company culture. L’Oréal’s Fit Culture App is the world’s first mobile application designed to immediately engage employees and help them understand and navigate company culture. The goal is to take onboarding practices to the next level and to give every employee, from the moment they arrive, the keys to succeed in full alignment with company values such as multiculturalism, diversity and inclusion. The app was designed by the L’Oréal culture team, in co-creation with 50 newcomers from over 30 countries around the world. The app complements the organization’s six-month strategic onboarding program for new hires. FIT focuses on the seven most critical parts of L’Oréal culture to master. Positives, challenges and advice for dealing with each of the seven areas are available through videos and written testimonials.

Features of the Fit Culture App include:

- Bite-sized capsules of content on topics such as entrepreneurship, networking and cooperation. Each capsule contains a mixture of text, photos, videos, testimonials, quizzes and mini-games.
- Completing real-life “missions” to put their learning into practice.
- Winning “Insider Secrets” (key events, anecdotes, company myths and legends) to earn points and eventually become true #CultureGurus.
- Newcomers participate in 5 to 10 minute daily sessions to complete their necessary missions. The Fit Culture App which is specifically created for the younger group of new hires, reaches up to 10,000 newly hired staff per year, and is available in 11 languages. L’Oréal employees can download it for free in the Apple Store and the Play Store.

CSAA Insurance Group’s Onboarding Modules on Inclusion and Belonging

At CSAA Insurance Group, all new hires are asked to participate in three learning modules to introduce them to the key concepts of inclusion and belonging, identity mapping and unconscious bias.

The self-paced introductory virtual session provides a high-level overview of what inclusion and belonging looks like at CSAA Insurance Group. Upon completion, participants will be able to:

- understand CSAA Insurance Group’s approach to inclusion and belonging
- articulate how the company defines diversity, inclusion and belonging, and
- recognize the important role every employee plays in the company’s culture of inclusion and belonging.

The identity mapping session, a 15-hour face-to-face session, focuses on how identities inform the way we experience the world. Upon completion, participants will be able to:

- name at least six of their identities and how they inform the way they navigate the world
- define the termsintersectionality, positionality, and privilege; and
- explore the personal impact of exclusion and ways to create a more inclusive space.

The unconscious bias session, a 2-hour face-to-face session, explores how bias can show up in our personal lives, during interactions with each other and while serving customers, and how we can mitigate bias. Upon completion, participants will be able to:

- define unconscious bias
- describe how unconscious bias can manifest in the work environment
- recognize three ways to mitigate the unintended impact of unconscious bias in the workplace; and
- identify opportunities for active inclusion.
Retention: Conduct Stay Interviews

**Toolkits and Cultural Agility for Stay Interviews**

A robust toolkit that effectively supports managers and human resource business partners (HRBPs) during the stay interview process will encompass several components. LCW, a Diversity Best Practices partner, recommends that organizations craft toolkits specific to their organizational circumstances and consider including components that address at least the following.

**Preparing for the Interview**
- Clearly establish evidence-based, weighted criteria for selecting interview candidates (including warning signals and related considerations).
- Offer support on handling employee resistance including information for interview candidates about what to expect during and after the interview.
- Provide checklists and templates for managers to use when preparing for a specific candidate’s interview.

**Conducting the Interview**
- Delineate the stages of a stay interview, including effective sequencing of questions and the pre- and post-interview process.
- Interviews should be conducted by a third party, an engaged alumni, or employee resource group leaders who have had training on how to do this.
- Suggest what should be said and done and what to avoid before, during, and after an interview.
- Provide a list of potential questions, along with related considerations for how managers can interpret and understand candidate answers.

**Following up after the Interview**
- Provide sample organization-specific responses to employee needs and concerns, such as those that surface during exit interviews, engagement surveys and previously conducted stay interviews.
- Identify the scope of actions that managers can take without approval as well as circumstances requiring upstream approval or guidance from HRBPs.
- Highlight internal and external resources available to assist managers in decision-making processes.
- Establish organizational guidelines for managerial response, action, and check-in timelines.
Data Transparency
Leverage The Data

- Review your workforce attrition data to identify where the leaks in the bucket are occurring. Segment the data by gender, race and other dimensions of diversity to identify discrepancies in promotions, professional and leadership development, and other opportunities for advancement.
- Conduct employee engagement surveys, focus groups and town halls to gather input and insight to better understand your culture and work environment. Use the results to pinpoint where bias, microaggressions, and other barriers that put diverse and underrepresented at risk of leaving are showing up.
- Gather input and feedback from employees across diversity dimensions to ensure your benefits meet the needs and expectations of all employees. Benchmark against other organizations to understand the benefits and policies landscape, and where you meet, exceed and fall short.
- Analyze how advances in technology and the growing skills gap are impacting your organization, and what jobs - and employee groups - are most at risk of displacement and disengagement.
Sodexo

Sodexo’s CEO has committed to reach global representation of 40% women in senior leadership by 2025, and linked 10% of annual incentives for the executive population to help achieve this goal. Additionally, Sodexo has set a target that all employees work for gender-balanced management teams by 2025, up from today, where 59% of employees work within entities with gender-balanced management.

Internal data showed that the share of women in their workforce dropped sharply after entry level, which reduced the number of women in the company’s leadership pipeline. To build accountability for increasing gender representation, Sodexo created a scorecard to measure progress and hold managers accountable.

Managers can earn up to 600 points for achieving numeric benchmarks for attaining hiring, promoting, and retaining women and underrepresented groups. The scorecard doesn’t just measure numeric progress. An additional 400 points measure D&I actions that managers engage in that improve Sodexo’s culture and demonstrate inclusive leadership. For instance, a manager can earn points for setting up bias and inclusion training for their team, by mentoring or sponsoring women or people of color, or by getting involved as a sponsor of the company’s ERG for women.

Sodexo monitors outcomes closely, and refines the scorecard as needed. For example, the initial scorecard only awarded points for meeting quantitative representation benchmarks. However, feedback suggested that Sodexo would see more widespread buy-in and less resistance if managers were also rewarded for changing their behavior, changing their processes, and being more inclusive.

Based on the feedback, Sodexo established additional metrics to capture and reward inclusive actions taken by managers. Sodexo leadership believes this expanded focus has helped the company meet its numeric goals faster, as well as made the company’s culture more inclusive.

The scorecard is driving real results. Over the past five years, women’s representation has increased by 10% on average at entry and manager levels, more than 20% at the SVP level, and has doubled in the company’s C-suite.

Intel

At Intel, to build accountability for D&I outcomes, diversity was established as a component of the strategic performance goals that determine 50 percent of executives’ annual cash incentives. The company provided additional bonuses for everyone at Intel - equal to as much as 7 percent of the person’s total bonus - if the company hit two goals: hiring 40 percent minorities and women, and ensuring that the retention rate of those groups is at least equal to that of White and Asian men.

These accountability measures and incentives helped Intel reach its representation goals two years ahead of schedule.
Culture
Inclusion Game Changers

Engagement

Inclusive Benefits

Allyship

Accountability

Purpose Driven Work
Companies where employees are comfortable discussing who they are and open about their identities experience increased engagement and retention. However, these are difficult times and being frank about one’s identity - or asking questions about someone else’s identity - can be fraught with uncertainty and stress. Creating safe and structured forums to help employees respectfully learn about and understand one another can help to overcome bias, build empathy, and develop relationships across differences.

Difficult conversations take strategy, skill, and courage. Use engagement surveys, stay interviews and other sources of employee input to identify your most pressing issues and challenges. In addition, ERGs can play a key role in both identifying issues and convening employees around difficult to discuss topics.

At **GuideWell**, the company’s employee community groups play a lead role in planning, organizing and convening forums to discuss societal issues that impact employees in their communities and at work. Although GuideWell’s executives, including the CEO, are very involved in the forums, serving as sponsors, facilitators and panelists, employee community groups gather input from employees around the topics to be addressed, lead the discussions, and serve as panel members.

At **Bank of America** courageous conversations explore differences in background, experience or viewpoints, such as class, age, gender, gender identification and expression, sexual orientation, ethnicity, and disability. The company also organizes courageous conversations in response to events that challenge communities on issues related to diversity and inclusion, social justice, and race and equality. Over 60,000 individuals have participated in courageous conversations at the bank, including the company’s Board of Directors, global senior leaders and local market presidents.
Intel’s Warmline – an employee hotline to confidentially report concerns – provides insight to workplace problems and improves retention rates. The Warmline works as an employee hotline to confidentially report concerns. If an employee is experiencing a problem, or considering leaving, they are encouraged to reach out to the Warmline first. The employee submits a confidential email request to the Warmline, answering three simple questions that help case managers determine the nature of the concern and the best person to handle the case. Warmline case managers are trained to assess complaints and flag those that may require an investigation. Within 48 hours of receiving a request, a Warmline case manager connects with the employee and sets up a confidential one-on-one meeting to address and work through the problem the employee is experiencing. Warmline case managers take confidentiality seriously and get the employee’s consent before reaching out to anyone else to help fix an issue.

The Warmline team is within Intel’s Global Diversity and Inclusion (D&I) group, which is part of Intel’s overall corporate HR. The Warmline team is staffed by case managers whose full-time job is to work on employee cases and concerns. The case managers are driven by a goal of promoting diversity and inclusion within the workplace and between employees, encouraging them to be their best selves. They are screened for certain competencies: empathy, listening skills, being able to navigate difficulties, ability to engage with diverse employees, and capacity to negotiate and influence at all levels. The Warmline team has handled cases from employees at all levels of the company—ranging from entry-level to senior executives.

Since its launch in 2016, the Warmline has handled over 20,000 cases and successfully retained 86 percent of employees that submitted a request. Intel’s Global Diversity and Inclusion Group credits Warmline as a key contributor to the early attainment of the company’s representation goal two years ahead of schedule. As part of its initial roll-out, the Warmline was just available for U.S. based employees. This year it is rolling out globally. Currently, Intel has begun the expansion of the Warmline program to its Latin American Region and Israel site.
Find new ways to talk about D&I to make it personal to all employees, and send the message that it takes everyone to achieve meaningful change. Weil recognized that diversity allies were needed to promote greater inclusion in the company. In 2015, the firm launched Upstander@Weil to inspire managers and employees to stand up for inclusion. The kick-off event featured a video of Upstander@Weil across levels and offices, inspiring remarks from senior leaders, and a panel sharing how they actively support diversity. A diversity training workshop with over 20 sessions across eight offices, an action guide with over 50 upstander behaviors, and extensive online resources were developed to raise awareness and showcase concrete behaviors to be an Upstander@Weil.

Accenture’s Mental Health Allies provide support to employees in a safe space. Launched by the company’s Disability ERG, mental health allies create mental health awareness and provide support and resources to employees in a safe space. Allies are volunteer employees from across the company who are personally committed to supporting mental health awareness and education. They serve as ambassadors and advocates and provide a go-to resource for employees looking for support or for information on mental health and the benefits and other resources available at Accenture. Although allies are not trained psychologists, psychiatrists or therapists, they are educated and trained in mental health topics, and often have experienced a mental health condition themselves. In addition to a U.S.-based chapter, the program operates chapters in seven countries globally, with plans to launch 19 additional global chapters in 2019. Today, the Mental Health Allies program includes more than 400 allies and nearly 200 trained allies across 27 Accenture offices worldwide.

Employee resource groups provide a rich environment for employees to get involved as allies and learn from colleagues whose identities and cultures are different from their own. For example, to extend the company’s efforts to promote inclusion, the San Francisco Fed designed an initiative focused specifically on the role of an ally and launched the new program at its annual ERG summit. The theme for the summit was “Be an Ally”, and the company asked all of its ERGs to recruit new members that would be allies to their cause.
Engage Your Multigenerational Workforce

Reinventing how generations work together

Age diversity should enrich your teams, not divide them.

As organizations work to unlock the value of age-diverse teams, they need to abandon outdated practices. Those that do will be best-positioned to compete for tomorrow’s top talent.

<table>
<thead>
<tr>
<th>The past</th>
<th>The future</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oldest employees hold most senior positions</td>
<td>Age diversity exists at all levels of the organization</td>
</tr>
<tr>
<td>Younger workers are mentored by older workers</td>
<td>All employees share and learn skills from each other</td>
</tr>
<tr>
<td>40-hour work week</td>
<td>More flexible scheduling options</td>
</tr>
<tr>
<td>Retire by age 65</td>
<td>Employees work as long as they need or want to</td>
</tr>
<tr>
<td>Generations bicker and scoff at one another</td>
<td>Inclusive cultures promote empathy and respect</td>
</tr>
<tr>
<td>Senior employees tapped to be mentors</td>
<td>Reverse mentorships allow learning to flow in multiple directions</td>
</tr>
</tbody>
</table>

Source: LinkedInSolutions
Stanley Black and Decker developed targeted programs to engage and retain older workers. One pilot program uses Artificial Intelligence (AI) to record and document key information and insight about how a job is performed from workers with deep experience performing the role. AI translates that expertise into a training video format.

Another strategy under development is based on flexible scheduling where workers dictate their schedule and the hours they work. These workers would be available remotely to trouble-shoot problems on the factory floor through a video-based ‘nerve center’. The approach allows older employees to work fewer hours, but stay engaged in the company’s workforce. It also would create a 24//7 global technical assistance resource for Stanley Black and Decker workers.
Opportunities to participate in and lead Corporate Social Responsibility (CSR) initiatives can increase employee engagement, stretch and expand employee skill sets, and help employees build important relationships across the organization, including with senior executives. According to SHRM, in 2018 nearly one in four companies and nonprofits in the U.S. are using paid volunteer time off to turn CSR into a competitive advantage.

A CSR approach that reflects the diversity of the workforce and market served is more likely to connect and resonate with employees and communities. To be sure this is the case,

• engage ERGs and employees in conversations about the impact they want the company to have to inform CSR focus.
• brainstorm how to accomplish CSR goals by capitalizing on the diverse resources, capabilities and skill sets in the company’s workforce.
• develop pathways and strategies to provide diverse talent exposure to CSR and opportunities to participate in and lead CSR initiatives.
• experiment with non-traditional CSR programs that are skills-based, on-site, or virtual.
• amplify the company’s CSR work by leveraging corporate communications, social media and employee storytelling within diverse markets and communities served.
• add a CSR based goal and objective to all ERGs. ERGs can serve as an effective vehicle for advancing CSR goals by contributing different points of view and connecting the organization with diverse communities. Get ERGs involved in generating CSR ideas and capitalize on corporate communications channels and social media to test those ideas with employees, consumers and communities.
Purposeful Work Next Practice ERGs

The Allstate Veterans Engagement Team and Supporters (AVETS) purpose is to provide employees, spouses, siblings, and supporters of veterans with a forum to gather with other employees who hold common interests, identities, and/or topics related to veterans.

Parents Working Together (PWT) provides an open forum to share challenges, milestones, and advice about how to balance work and family. We are focused on advocating on behalf of all working parents at Allstate and providing a support system through networking and information sharing. Our vision is to educate, communicate, and leverage resources to ensure employees will be successful without compromising family life or professional commitment.

The Allstate Foster and Adoption Network (Allstate FAN) purpose is to help inform and support prospective and current adoptive and foster families and adoptees in the Allstate community. We engage with employees, families, communities, and other stakeholders to improve awareness and provide direction or resources as needed.

The Young Professionals Organization (YPO) mission is to develop on-the-job initiatives and actual business opportunities for young professionals at Allstate so that our company can deliver its enterprise-inclusive diversity commitments.

The I@A vision is to create an inclusive environment where employees with diverse, intrapreneurial thinking and ideas can foster innovation and contribute to Allstate’s business objectives.

Source: DBP ERG Leadership Handbook
Three ways for businesses to effectively pursue diversity and inclusion practices to master the future of work:

1. **Treat D&I as a learning priority, not a training priority.** Employees need to be exposed to a range of realistic experiences so they can easily adapt to situations at work and learn to respect others’ feelings. Using augmented or virtual reality (AR/VR) technologies, employees can gain empathy by experiencing the workplace in someone else’s shoes. Viewing their office from the eyes of a disabled person, for example, could help people manage their unconscious biases by better understanding the workplace accommodations that could increase productivity and comfort for every worker. These learning experiences would be far more effective than the “overnight-fix” types of diversity training programs that are typically employed.

2. **Embrace inclusion as a skill that makes humans more human.** As the future of work unfolds, what makes us human will make us employable. Companies are increasingly placing a premium on job applicants who demonstrate skills like flexibility, self-motivation, empathy, resilience, creativity and communication, as they know these capabilities will become a competitive advantage when paired with the strengths of AI-driven machines. What if we made inclusion an essential skill rather than just a corporate-level concept? This small change in mindset would turn inclusion from “program-driven” to “competency-driven” and would deepen trust between employees and employers and among employees themselves.

3. **Ensure leaders walk the talk.** No matter how inclusive and diverse your D&I efforts are, if leaders are undermining them, things will not change much — they can’t be passive supporters. Leaders have a disproportionate effect on setting the tone of the culture and, as such, they have a tremendous opportunity to create a space in which everyone can voice their honest, authentic feelings without judgment. People perform best when they feel valued, empowered and respected by their peers, not if they are fearful of being attacked for saying the wrong thing. When leaders are proactively engaged in discussing opportunities and challenges related to D&I, the entire organization is also engaged. It is my job to be a role model and show how important this is to our company.” The biggest driver of D&I success within a company is an unconditional commitment from the executive teams to making it happen.
Inclusive Benefits
Understand What Benefits Matter to Employees

<table>
<thead>
<tr>
<th>Type of Employee Benefit</th>
<th>Important (NET) – Very/Somewhat Important</th>
<th>Offered by Employer</th>
<th>The Gap: Importance vs. Offered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Insurance</td>
<td>94%</td>
<td>75%</td>
<td>-19</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>79%</td>
<td>51%</td>
<td>-28</td>
</tr>
<tr>
<td>Disability Insurance</td>
<td>77%</td>
<td>44%</td>
<td>-33</td>
</tr>
<tr>
<td>Long-Term Care Insurance</td>
<td>74%</td>
<td>25%</td>
<td>-49</td>
</tr>
<tr>
<td>Critical Illness Insurance</td>
<td>66%</td>
<td>16%</td>
<td>-50</td>
</tr>
<tr>
<td>Employee Assistance Program</td>
<td>64%</td>
<td>30%</td>
<td>-34</td>
</tr>
<tr>
<td>Financial Wellness Program</td>
<td>63%</td>
<td>16%</td>
<td>-47</td>
</tr>
<tr>
<td>Workplace Wellness Program</td>
<td>60%</td>
<td>28%</td>
<td>-32</td>
</tr>
<tr>
<td>Cancer Insurance</td>
<td>59%</td>
<td>10%</td>
<td>-49</td>
</tr>
</tbody>
</table>

Source: TransAmericaCenter
Only 14 percent of civilian workers in the U.S. have access to paid family leave; one in every four new mothers goes back to work just 10 days after giving birth; and people who make more than $75,000 a year are twice as likely as those who make less than $30,000 to get paid leave.

The majority of paid family leave policies reinforce class and racial divides by giving different paid family leave benefits to different classes of employees, with those in salaried positions getting much more leave than those in hourly jobs. This is reflective of a national reality where only six percent of low-wage earners have access to paid family leave.

The need for paid family leave is urgent and growing. Every year, more than 40 million people, or 18 percent of the U.S. working population, spend an average of 24 hours a week providing unpaid care for a chronically ill, disabled, or elderly family member. As our population ages, these caregiving needs will only increase, with a disproportionate impact on working women and people of color who make up the majority of unpaid family caregivers in this country.

U.S. Employers are totally unprepared for the family caregiver boom. When most people think about the unmet need for paid leave in the U.S., they think of new parents who need time to be with their infants, but just 21 percent of family leaves from work are taken for new babies.

Source: 2018 PL&US Report
Appen employs 350 full-time employees with flexible work options spread out across seven countries, and over one million global contractors who are 100% remote. What Appen found was that while the team liked the flexibility, it could sometimes leave them feeling isolated.

To combat this, the company set out to create a more connected, collaborative culture. In 2017, Appen started investing in different tools that could make this possible, like video conferencing, instant messaging, and document collaboration solutions. It also built an internal community forum where employees can do everything from troubleshooting common issues to shooting the breeze and getting to know one another.

To support this new way of working, managers at Appen take LinkedIn Learning courses that help them better manage their remote teams. Steps like this can help make changes really stick, since employees often follow their managers’ lead.

The results have been dramatic. In one year, Appen’s attrition rate dropped by 5%. Today, 80% of the company’s core workforce say they’re satisfied with their jobs.
**Behavioral Health/Substance Abuse Benefits**

**Boeing’s** long-term strategy to improve access to treatment for behavioral health and substance abuse issues recognizes that many different doorways to care are needed. Several years ago, the company placed Employee Assistance Program counselors in onsite occupational health clinics that offer an array of services and are well-utilized; employees can see a counselor without concern that others will know the type of service they are receiving.

Another doorway can be a patient’s visit to a primary care physician (PCP) — but only if the PCP recognizes the problem and knows what to do about it. Led by one of Boeing’s senior ACO partners, a simple, ingenious solution was pioneered for Boeing ACO members, giving all PCPs in the network the ability to consult directly — and in real time — with a psychiatrist’s office to discuss concerns or questions arising during a patient’s office visit. The program is based on clinical evidence indicating that the collaborative care model is twice as effective as standard care for people with depression and anxiety.

Over two years, patient symptoms improved (and held steady), and they had a higher level of satisfaction with their care. Unlike the standard process for triage or intake today, the program is based on the premise that the first stop for a person with concerns about a behavioral health issue should be with the most qualified professional to ensure he or she gets the right guidance at the first contact.

The program will provide ACO members with same-day telephone or video access to a psychiatrist or doctoral psychologist for free. Whether it’s a new concern, confusion or dissatisfaction with current treatment, or help coordinating care with other doctors, members will get expert support and follow-up. The pilot is targeted for a summer 2018 launch, with the expectation to roll out a refined model more broadly in 2019.
The 2018 Longer Working Careers Survey found a majority of employers either have adopted or plan to adopt one or more of the following strategies over the next few years:

**Wellbeing enhancements:** 66% offer financial wellbeing or retirement planning programs tailored to older employees approaching retirement. Another 19% are either planning to offer these next year or considering these programs for 2020. 36% have modified working conditions to conform to preferences of older employees, and that is expected to increase to 43% by 2020.

**Flexible employment:** 30% of respondents allow workers to change positions (e.g., shift from management to individual contributor), and this could increase to more than half by 2020. 27% provide part-time employment, and this could increase to 45% by 2020.

**Consulting arrangements:** 49% allow their retired employees who are collecting benefits to work as consultants or contingent workers. Another 10% might add this by 2020. A similar percentage hires experienced retired employees in their industry on a consulting or contingent basis.

**Phased retirement:** 9% offer formal phased retirement programs, but this could grow to 23% by 2020. However, informal phased retirement programs are much more common, since they avoid some of the administration and compliance challenges of a formal program. Employers offer these informal phased retirement programs more often to senior workers in professional roles, and less so to those in sales, administration or hourly positions.

Source: [WillisTowersWatson](https://www.willis-towers-watson.com)
Case Studies: Phased Retirement

Approximately 25% of the workforce at Herman Miller is over age 55. To retain that talent, the company has a program that allows employees to take 6 to 12 consecutive weeks off during the year. They aren't paid during that time, but they keep their benefits and length of service. The company also has a "flex-retirement" plan that allows for an exit stretched out from six months to two years. In return for the planned reduction in hours, employees put together a knowledge transfer plan to teach the ropes of the job to their replacement.

Southern California Gas employs more than 8,200 people; in 10 years, half of them will be eligible to retire. Instead of watching knowledge walk out the door, the utility lets older workers scale back hours while maintaining full pay through part-time wages plus accrued vacation and sick leave. In turn, they mentor younger colleagues. For older employees who have been working decades, this lets them ease into retirement for a year or so rather than abruptly end their careers.

Intuitive Research and Technology is focused on retaining experienced workers with the specialized skills needed for the engineering and analytical contracting it provides, and that means offering all sorts of flexible work schedules. About 8 percent of the workforce is in some sort of phased retirement program. Some of these workers sign on for specific projects, while others may work many hours for a few weeks and then be off for nine months. The phased retirement arrangements are open-ended, with no required retirement date.
**Fidelity’s** customers wanted call center representatives with a first-hand understanding of common life decisions, so Fidelity hired retirees to staff its 401(k) call centers and offered flexible work arrangements to attract and keep them.

As a way to attract mature engineers to its firm, **Burns and McDonnell** offers 100 percent vesting in its employee stock ownership plan when workers reach age 62, regardless of years of service.

**Atlantic Health System** allows retirees in the 1000 Hour Club to return to work either on a part-time or per diem basis three months after retirement. A retiree can work up to 999 hours annually and still collect retirement benefits.
In 2016, Humana overhauled its remote work policies and began to champion the benefits of work flexibility. Staff responded enthusiastically, with nearly half working remotely at least some of the time. There was just one problem: The call center team couldn’t benefit from these policies because calls could only be recorded at their desks.

When one call center leader raised this issue with the company, Humana began to explore emerging technologies that would allow the team to work from home. After some research, it launched a pilot program in 2018 that equipped call center employees with new at-home technology that enabled remote work.

The tech changed everything. The call center team could suddenly enjoy the same perks as everyone else, and the company could save on desk space by replacing its assigned seating structure with a more flexible, shared workspace.

By making its flexible work policies more robust and inclusive, Humana has also found it easier to attract great candidates. What’s more, now that its workforce is empowered to work remotely, it doesn’t have to rely solely on local talent.
Education & Learning Related Benefits
Today’s Employees Value Learning

Culture of Continuous Learning

Providing employees with ongoing opportunities to develop new skills has become a business priority. A competitive labor market has made it increasingly difficult to recruit new talent, and at the same time, advances in technology and automation are displacing some jobs and driving demand for new skills and capabilities. The gap between the skills needed and the skills available in the job market is growing, and will continue to increase as technology advances.

Leading companies are responding to these challenges by building employee skills internally through substantial upskilling and reskilling initiatives. Encouraging the learning objectives of employees not only builds in-house expertise, retention rates also increase when employees are supported and advancing in their careers.

The number-one trend for 2019 is the need for organizations to change the way people learn; 86 percent of respondents cited this as an important or very important issue.

Deloitte Research

41%

of millennials would change jobs in order to have professional development programs, compared to only 23% of baby boomers.

(Gallup 2017 State of the American)
Trend: Upskilling and Reskilling the Workforce

A report by the World Economic Forum predicts that 75 million jobs will be eliminated due to AI by 2025.

BUT

approximately 133 million new jobs will also be created.

54 percent of employees will need to reskill to take advantage of these new opportunities.

*In PwC’s Annual Global CEO Survey*

*Deloitte’s 2019 Global Human Capital Trends survey*

- 79% said a shortage of skilled talent was one of their top three worries.
- 46% said upskilling was their preferred solution.
- 90% report their organizations are redesigning jobs.
- 84% are increasing investments in reskilling programs.
Trend: Upskilling and Reskilling the Workforce

Amazon will commit $700 million over six years to provide 100,000 employees with access to training programs in areas such as healthcare, machine learning, manufacturing, robotics, and computer science. The training, which could reskill up to one-third of the company's U.S. based workforce, is voluntary, and most of the programs are free. As an example, the company is setting up classrooms in some of its fulfillment centers and launching a 16-week certification program that will enable warehouse workers to train for roles as data technicians - with no prior IT experience required. If they successfully complete the course and are hired by one of the company's data centers, they can double their wages from $15 an hour to $30 an hour. Another program aims to give nontechnical workers the skills to become successful software engineers. In addition, Amazon Career Choice offers employees tuition reimbursement to pursue postsecondary educational degrees at night, even if the course of study is not related to a future job at Amazon. The efforts will help employees qualify for higher-paying jobs and create a huge group of internal candidates who can take on roles in some of the company's fastest-growing areas. (Amazon)
Develop an Approach That Works for You

<table>
<thead>
<tr>
<th>Example Reskilling and Upskilling Approaches</th>
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<tbody>
<tr>
<td><strong>Blending Training</strong></td>
</tr>
<tr>
<td><strong>Career Path</strong></td>
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<tr>
<td><strong>Coaching</strong></td>
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<td><strong>Detail</strong></td>
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<td><strong>Mentoring</strong></td>
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<td><strong>On the Job Training</strong></td>
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<td><strong>Rotational Assignment</strong></td>
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<td><strong>Shadowing Assignment</strong></td>
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According to research by Deloitte, the number-one trend for 2019 is the need for organizations to change the way people learn; 86 percent of respondents cited this as an important or very important issue. Deloitte Research

According to a Gallup survey, 41 percent of millennials would change jobs in order to have professional development programs, compared to only 23 percent of baby boomers (source: Gallup 2017 State of the American Workplace)

According to a study by LinkedIn, employees who spend time at work learning are 47 percent less likely to be stressed, 39 percent more likely to feel productive and successful, 23 percent more ready to take on additional responsibilities, and 21 percent more likely to feel confident and happy. The survey also found the number one reason people quit their jobs is the inability to learn and grow. (Bersin/LinkedIn 2018).
Gamification can make learning more engaging by injecting competition, visibility, and rewards into the learning experience. The approach can provide real-time support at the task level, help learners understand when they are on the right track, and allow your company to provide an incentive structure that rewards employees at different learning milestones.

In 2011, Siemens launched Plantville, an online game designed to simulate the experience of being a plant manager. Players are challenged to maintain operation of their plant while improving productivity, efficiency and facility health. Since its launch, 23,000 engineering professionals have spent approximately 14 minutes with the game every time they visit the site. That means at almost any time of the day someone somewhere is playing Plantville. These players include more than 3,500 employees, prospects and customers from more than 11,500 companies, and engineering recruits from more than 600 universities and colleges nationwide.

Microsoft uses gamification to train call center personnel. The goal was to change behaviors, develop skills and encourage sales in a fun and interactive manner. The gamified learning approach generates competition among learners by using leaderboards and other game elements, and enables participants to have more control over their learning and development. Results include a 10 percent increase in agent productivity, 12 percent reduction in absenteeism, and more than 2X increase in employee awareness, compliance and knowledge levels.
Accenture’s Connected Learning program includes 37,000 online courses and 2,300 learning boards curated by subject-matter experts that provide employees with anywhere, anytime development opportunities from design thinking to AI. Employees also have opportunities for certification in areas including project management and data science. By the end of 2020, Accenture will invest $1.4 billion in training for its U.S. workforce while creating 15,000 highly skilled new jobs.

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Through McDonald’s Archways to Opportunity education program, eligible employees at participating U.S. restaurants receive an opportunity to earn a high school diploma, receive upfront college tuition assistance, access free education and career advising services and learn English as a second language. McDonald’s also has plans to launch a career navigation app in the U.S. that will allow eligible employees and the communities in which McDonald’s serves the chance to explore careers at McDonald’s and in other industries like healthcare and IT.
**Anderson Global** provides up to $12,000 toward student loan repayment. It will contribute $100 a month for five years. At the end of that time period, the company will contribute a lump sum of $6,000.

Through a partnership with Guild Education, **Taco Bell** team members have access to Guild’s academic and financial aid coaches and discounts to Guild’s education partners – a network of 80 online non-profit universities and learning providers, offering Bachelor’s and Master’s degrees, programs such as high school completion and English-as-a-second-language and a wide selection of certificates, as well as up to $5,250 a year in tuition assistance.

**Learning Fund** reimburses up to $10,000 per year for tuition and books for courses, graduate programs, and certain certifications that meet the reimbursement eligibility criteria. The Learning Fund will also reimburse up to $1,000 per year for short-term learning opportunities and skill development such as conferences and workshops, professional and technical training courses, online learning, and professional memberships.

**Aetna** pays 100% of eligible expenses for degrees or job-related school courses. For full-time employees, Aetna will pay up to $5,000 a year toward a degree, and up to $2,500 for job-related courses and certificates. For part-time employees working 20 to 39 hours a week, Aetna offers up to $2,500 for courses that are part of a degree program and $2,500 for career-related courses.

Aetna also gives its full-time employees up to $2,000 per year for their student loans with a $10,000 lifetime limit. Part-time employees working 20 or more hours per week are eligible for $1,000 per year with a $5,000 lifetime limit. You must have earned your degree within three years of applying to qualify. The company also offers a tuition assistance program to help employees who are currently in school.

**Fidelity Investments** helps its employees pay off student loan debt, and it also offers tuition reimbursement to employees. Fidelity offers up to $10,000 in contributions for student loan repayment.
Cigna’s Educational Reimbursement Program (ERP) is designed to support employees’ growth and development, and increase productivity and engagement by providing tuition reimbursement for external learning pursuits. In 2018, approximately 2,500 employees participated in the ERP and educational reimbursement was valued at $11.6 million, increasing 15% from 2017.

Cigna also offers 2 learning opportunities with no out-of-pocket expenses for employees. The Health Care Compliance Certificate Program is offered online through Quinnipiac University School of Business and School of Law. The company also offers a Customized Accelerated MBA Program in partnership with University of Hartford. The 2-year, cohort-based program is specifically designed to align with Cigna's strategic priorities and is available on-site at the Cigna Learning Center in Bloomfield, CT or 100% online. All costs—tuition, books, and fees—are covered at 100% through Cigna's ERP in accordance with Cigna's ERP policy.

The ERP leads the Cigna Scholars Program which offers employees contemplating or currently enrolled in a higher-education program the opportunity to collaborate through mentoring, networking, and peer-to-peer support across the organization through a web-based platform.