Overview of 4L® Diversity, Equity and Inclusion Framework
Purpose of Overview

● Provide an overview of our 4L© Diversity, Equity and Inclusion Module
● The Goal
● Leading Change
● The Path Forward & Timeline
● Program Success Criteria
Now that you Know Better...

“Do the best you can until you know better. Then when you know better, do better.”

– Dr. Maya Angelou
Diversity, Equity and Inclusion – 4L© Framework

Listen

Learn

Live

Lean-In
Learn – Learn, History, Language & Business Case

Listen – Assess the current state of DE&I in all companies

Lean-in – Train & Practice

Live – Walk the Talk
Our Three Guiding Principles

- Diverse Perspectives
- Diverse by Design Teams
- Collaborative Decision-making
- Shared Authority
A Marathon...Not a Sprint...

“If you want to go fast, go alone, if you want to go far, go together.” – African Proverb
Listen – Assess the Current State

- Conduct a document review – understand where DE&I capabilities exist
- Collect information through a customized survey, interviews and/or focus group sessions
- Compile the information to determine readiness level: Exploring, Emerging, or Evolving
- Develop customized action plan

In our experience, most organizations are at the Exploring stage—many get stuck between Exploring and Emerging. Very few are Evolving.
Listen in Practice...

● In what ways are you “listening” to what is working and not working in your organization?

● What are you doing with the information?

● What changes have you implemented in support of DE&I?
Providing leaders with DE&I context and language will help to increase confidence to drive productive discussions. Understand the business case for change.

How did we get here? What is at the root of the inequities?

How does DE&I help us achieve our goals?

What do the words describing DE&I mean? How does the knowledge shape our interactions?

*Groundwork for Successful outcomes
Learn in Practice...

● What does diversity mean to you?
● What does inclusion look like in practice?
● What is the difference between equity and equality?

![Equality, Equity, Justice](images)
Lean-in – Train and Practice

Once the history and language is understood, you can begin training to deepen awareness and begin to embed into high impact business processes.

Possible Initial Focus Areas:
- Implicit Bias Training
- Value Chain Analysis
- Begin to make changes in Talent Management practices (e.g. hiring practices)

Robust Communication is needed during this phase.
Lean-In and Practice in Action…

- What steps are you taking to continue to explore your bias?
- Are there areas/processes within your workplaces to explore more equity and/or inclusion?
- What is needed to increase psychological safety within your organization?
Live – Walk the Talk

With history, and language proficiency and some experience within targeted business practices, the stage is set to expand globally into Mission, Vision, Values, Strategy and Competencies.

- Mission/Purpose
- Vision
- Values
- Strategy
- Competencies
- Metrics
Live in Practice...

● What resources have you dedicated specifically to support DE&I changes?
● What could you change to imbed DE&I into your Mission, Vision and Values?
● What metrics have you identified to measure your DE&I progress?
Leading Change…

We use a ADKAR/Kotter combined change methodology used by many firms to drive transformational change. The combination of these methods ensure change at the individual and organizational level:

<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>TARGET</th>
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<tbody>
<tr>
<td>Create Awareness of the Need for Change</td>
<td>Individual</td>
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<tr>
<td>Create a sense of urgency</td>
<td>Organizational</td>
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<tr>
<td>Build a guiding coalition (Stakeholders)</td>
<td>Organizational</td>
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<tr>
<td>Create desire to support the change</td>
<td>Individual</td>
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<tr>
<td>Form a Strategic Vision and Initiatives</td>
<td>Organizational</td>
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<tr>
<td>Enlist a Volunteer Army (Change Agents)</td>
<td>Organizational</td>
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<tr>
<td>Provide Knowledge of how to change</td>
<td>Individual</td>
</tr>
<tr>
<td>Enable Action by Removing Barriers</td>
<td>Organizational</td>
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<tr>
<td>Create Ability to demonstrate the change</td>
<td>Individual</td>
</tr>
<tr>
<td>(training)</td>
<td>Organizational</td>
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<tr>
<td>Generate Short-Term Wins</td>
<td>Organizational</td>
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<tr>
<td>Sustain Accelerations</td>
<td>Organizational</td>
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<tr>
<td>Institute Change</td>
<td>Organizational</td>
</tr>
<tr>
<td>Implement reinforcements to sustain change</td>
<td>Individual</td>
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</tbody>
</table>
## Client – Roadmap – Year 1 – A Marathon – Not Sprint

### Year 1 2020-2021

<table>
<thead>
<tr>
<th>Month</th>
<th>Activities</th>
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<tbody>
<tr>
<td>Aug-Sep</td>
<td>Listen – Conduct DE&amp;I - Current State Analysis</td>
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<tr>
<td></td>
<td>Analyze Data – Develop Year 1 Workplan</td>
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<tr>
<td></td>
<td>Establish Communication Feedback Loop</td>
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<tr>
<td></td>
<td><strong>Ongoing:</strong> Monitor Feedback &amp; Adjust</td>
</tr>
<tr>
<td></td>
<td><strong>ongoing:</strong> COMMUNICATION, MARKETING &amp; BRANDING</td>
</tr>
<tr>
<td>Oct-Nov</td>
<td>Learn – Begin Level 1 Training</td>
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<tr>
<td></td>
<td>Develop and Socialize Level 2 Training Plan</td>
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<tr>
<td></td>
<td><strong>Begin Level 2 Training</strong></td>
</tr>
<tr>
<td>Dec-Jan</td>
<td>Lean-In – Assess Value Chain</td>
</tr>
<tr>
<td></td>
<td>Identify Business Area Opportunities</td>
</tr>
<tr>
<td>Feb-Mar</td>
<td>Live – Ongoing</td>
</tr>
<tr>
<td>Apr-May</td>
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<td>Jun-Jul</td>
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</tbody>
</table>
Roadmap: Listen, Learn, Lean-In, Live

Date Client Leadership Conference – DEI Capstone 1
Activate Culture Advisory Council

Develop DEI Cultural Pillars: Definitions, Behaviors and Competences

Design Change Management & Communications Plans

Review/Renew Talent Systems & Management Practices
Socialize/Vet Client Cultural Pillars across org.

Develop/Revise Talent Systems & Management Practices

Cascade DEI across all Client entities & departments/functions

Date Client Leadership Conference – DEI Capstone 2

Date Client Leadership Conference – DEI Capstone 3

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Program Success Criteria

- Championing by CEO/ED, Board and Senior Executive Teams
- Access to, and involvement from DE&I Council
- Access to and support from Client Project Management Office and resources as needed
- Support from Internal and External Communications, Marketing and Branding teams
- Engagement of Middle & Front-Line Managers and all Staff
- Timely response of requesting information to advance the work
- Administration Support who can help with coordination within Client organization
Now that you Know Better…

“Do the best your can until you know better. Then when you know better, do better.”
– Dr. Maya Angelou

- Slow down
- Further investigate your biases
  - How does it impact your teams?
  - How does it impact your decision making?
- Flip it to test it
- Identify support to help catch your blind spots
- Be responsible for your own education
- Hold yourself accountable!
Questions?

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