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October 27–29

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“I-LEAD”: BECOMING AN INCLUSIVE LEADER IN A CHANGING ENVIRONMENT

October 28, 2020

Speaker



Tracey Walker National Sr. Director of Diversity and Government Affairs

- CDI Initiatives and Learning for 12,000 domestic, 22,000 global workforce
- 20 year career in accounting/public policy; 15 years RSM
 - Former FAS Federal Government Industry
 - Leader of Financial Services Institutions Sector
- Lecturer – Kelley, Isenberg Schools of Business, AICPA Women's Leadership Summit, AGA, IFAC and RSM Conferences Beijing, Berlin, Howard University Center for Accounting Board of Directors
- Cornell University – CCD-AP, Diversity Professional
- Harvard Business School Graduate – Organizational Behavior
- Diversity MBA 100 Most Influential Women in Diversity and Inclusion 2020
- Chair, AGA Council for the Advancement of Women
- Inclusion Task Force for the Greater Washington Board of Trade



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Speaker



Steve Kampa Partner, Tax Services

Steve joined RSM in 2007 and currently works with the RSM national tax office where he serves as the tax leader of RSM's accounting industry service line of business serving certified public accounting (CPA) firms in RSM US Alliance, RSM Canada Alliance, Firm Foundation and AdvanceCPA associations. Steve was previously the first national leader of RSM's LGBTQ+ employee network group, Pride, which began in 2015. In this role, he championed LGBTQ+ inclusion in the retention and recruitment of employees and clients across the firm.



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Agenda

Topic	Minutes
Introduction	5
Inclusive Leadership	10
Inclusive Culture Landmines	20
Inclusive Culture Benefits	15
Alliance in Action	10



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Objectives

By the end of this course, you will be able to:

- Identify the **principles of inclusive leadership** and how to apply them to achieve enriched enterprise outcomes
- Recognize what to avoid and how to navigate **inclusive culture landmines** to achieve a more inclusive enterprise
- Harness the **inclusive culture benefits** for talent and client success
- Define the Alliance member **best practices and action steps** that drive change and positive impact for your organization



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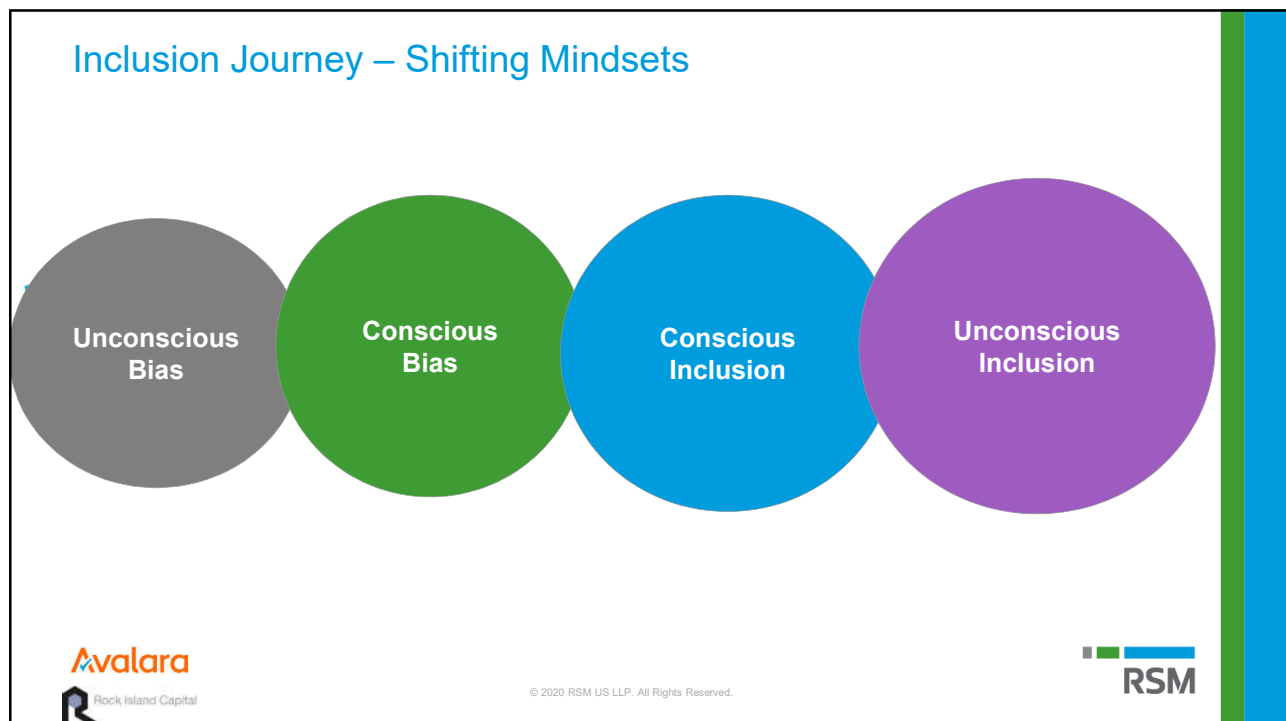
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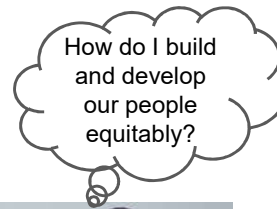
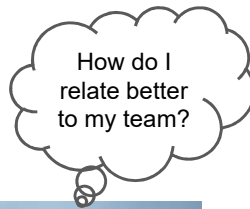
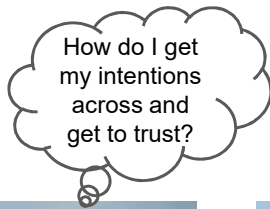
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INCLUSIVE LEADERSHIP

Part One



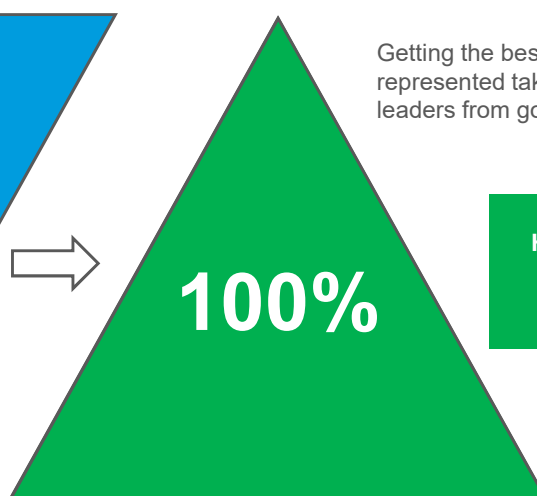
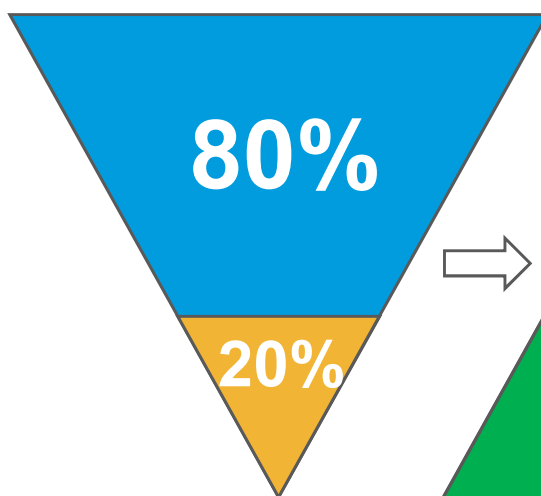
Inclusive leaders consider...



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80/20 Rule becomes the Great 20



Getting the best from the least represented take teams and their leaders from good to GREAT.

High Performing leadership and population



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The absence of inclusive leadership



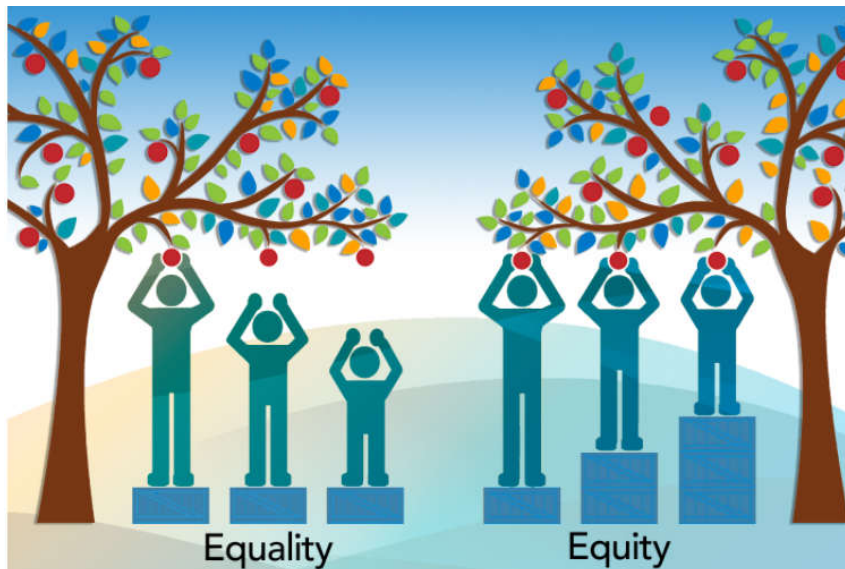
- Q: Isn't treating everyone the same enough to make me an inclusive leader?
- A. No, there is a difference between equality and equity. Inclusive leaders meet their team members where they are.



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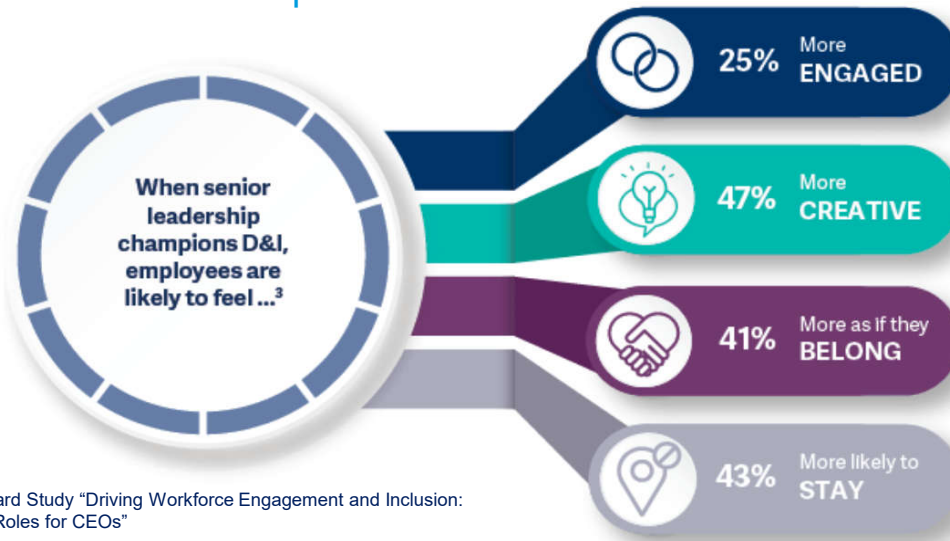
Equality vs. Equity. Master equity.



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Inclusive Leadership Matters



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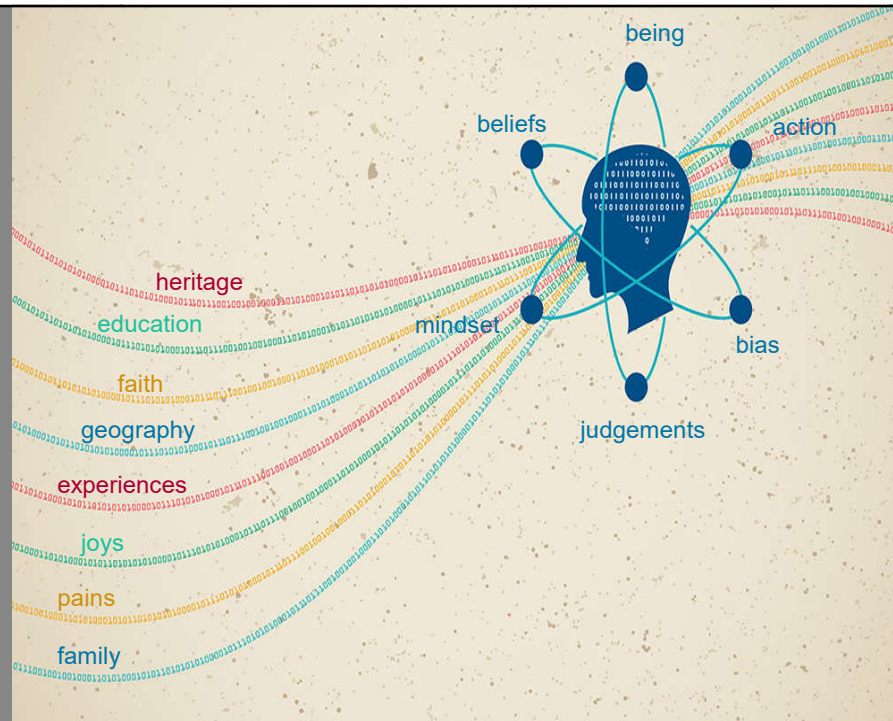
INCLUSIVE CULTURE LANDMINES

Part Two

Intersectionality

Think about 3 words you would use to describe yourself...

Dr. Kimberly Crenshaw – *We occupy multiple definitions and they intersect in a number of ways*



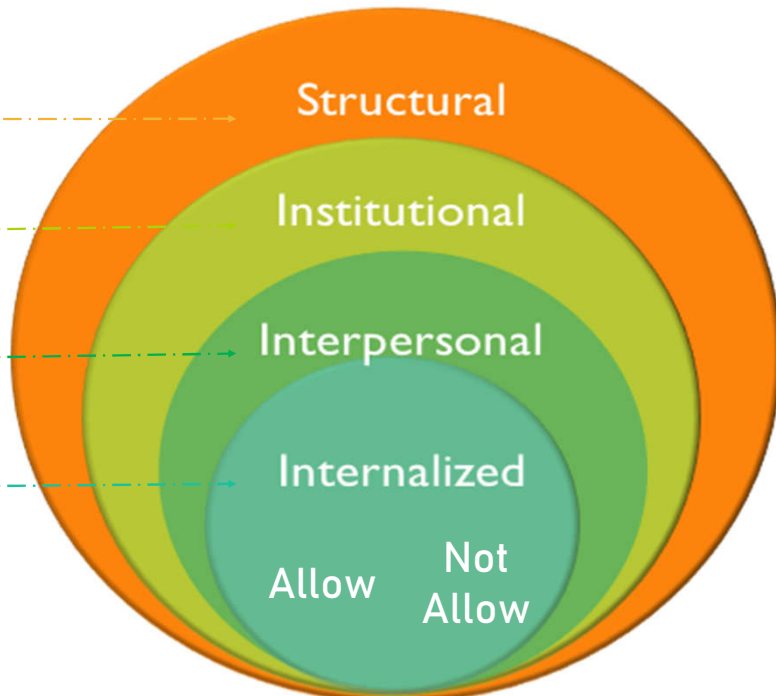
Racism

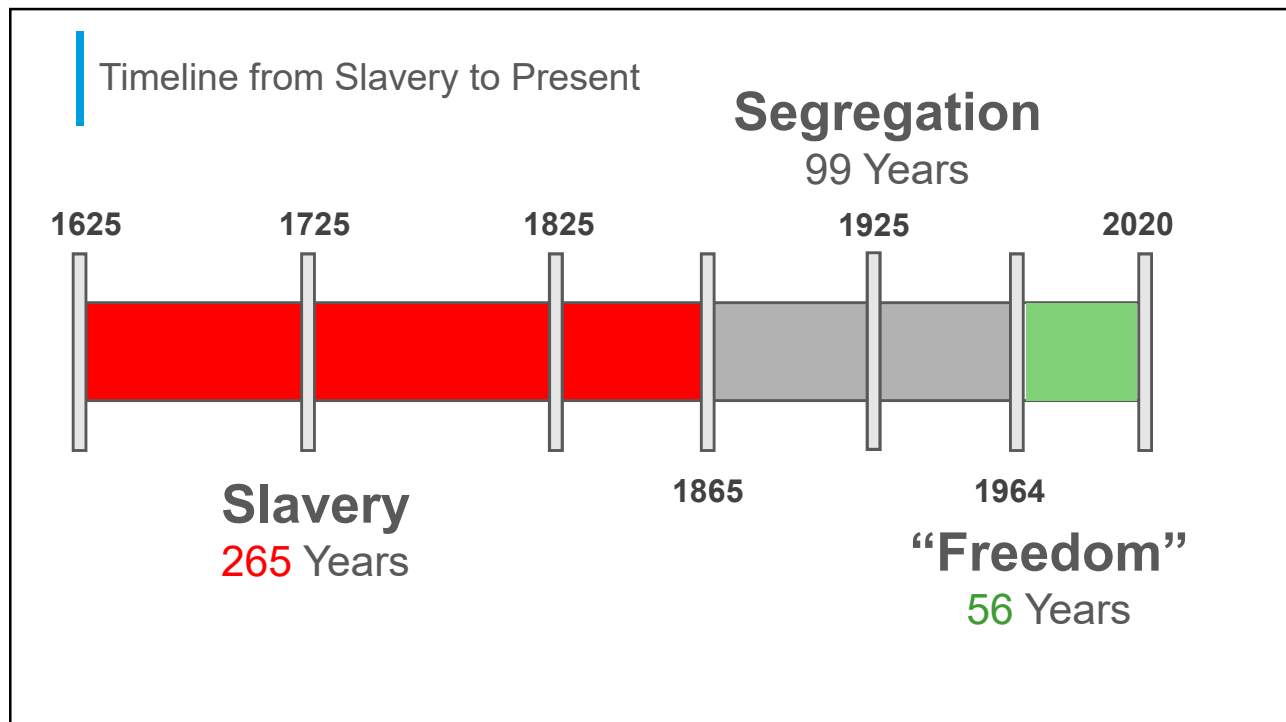
Structural policies, practices and programs which leads to adverse outcomes and conditions for communities of color compared to white communities.

Institutional policies and practices work to the benefit of white people and the detriment of people of color, usually unintentionally.

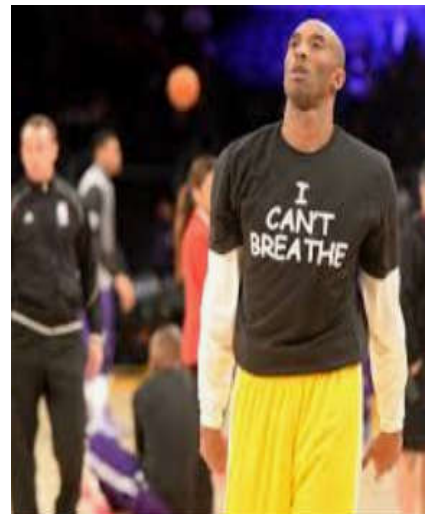
Interpersonal Pre-judgment, bias, stereotypes or generalizations about an individual or group based on race.

Internalized Participating in the set of attitudes, behaviors, social structures and ideologies that maintain the dominating group's privilege and power over people of color.



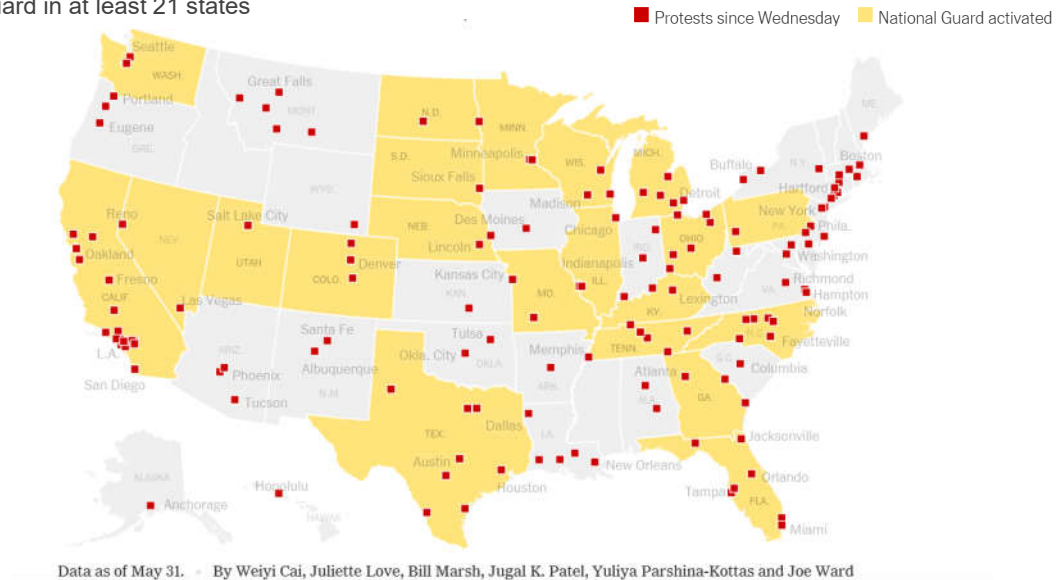


Reflections



Protests Over Racism and Police Violence

Protests have erupted in at least 140 cities across the United States in the days after George Floyd, a black man, died in police custody. Some of the demonstrations have turned violent, prompting the activation of the National Guard in at least 21 states



Suspect vs. Respect

SUSPECTING Behavior

- Talk About the Person
- Evaluating
- Defensive
- Problem Finding
- Telling
- Closed Thinking
- Assuming
- No Benefit of the Doubt
- Avoiding
- Holding on to the Past
- Labeling
- Judging



Suspect vs. Respect

RESPECTING Behavior

Talk With the Person about Issues

Exploring

Curious

Problem Solving

Engaging

Open Minding

Information Seeking

Full Benefit of the Doubt

Advocating

Focused on the Future

Listening

Joining



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Fears

The barriers to
Courageous
Conversation
can be overcome
by pressing
through fear to
reasoning,
resolution and
reconciliation

- **Fear of being judged, labeled or penalized for candor**
- **Fear of being misunderstood**
- **Microaggressions**
- **Defensiveness about issues of privilege**
- **Fear of appearing “-ist” (racist, sexist, misogynist, etc.)**
- **Fear of confronting one’s privilege**
- **Fear of responsibility for taking steps to end inequity or oppression**
- **Lecture and monologues**
- **Emotional content**
- **Power differentials between white people and people of color**



Keys to Courageous Conversation

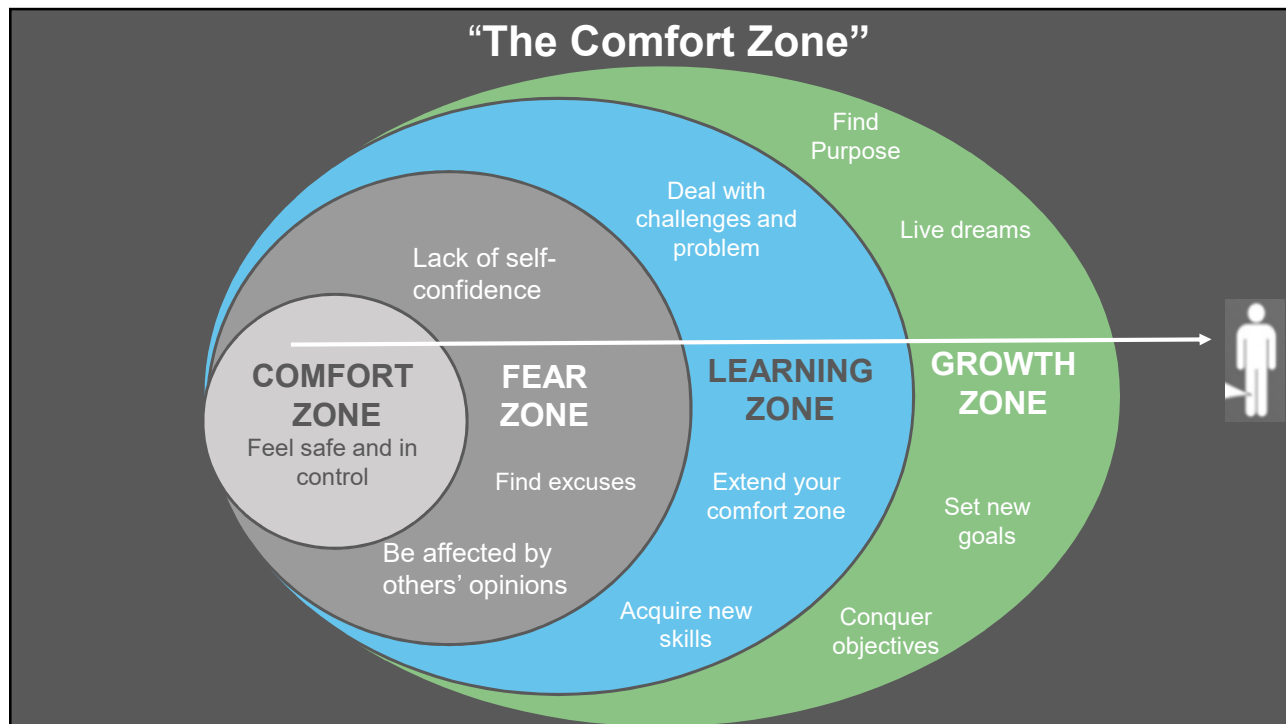


"I have found my role to be much more fulfilling when I lean into issues as opposed to the opposite. Not always easy in the short term but much more impactful in the long term."

– Jamie Woell, Office Managing Partner, Minneapolis, MN

- **Assume Positive Intent:** Extend empathy and suspend your reaction to the shared views and comments of others.
- **Experience discomfort:** Discomfort is inevitable, especially, in dialogue about race, and that participants make a commitment to bring issues into the open. It is not talking about these issues that create divisiveness. It is through dialogue, even when uncomfortable, the healing and change begin.





Privilege and Comfort

“Choosing our own comfort over hard conversations is the epitome of privilege, and it corrodes trust and moves us away from meaningful and lasting change.”

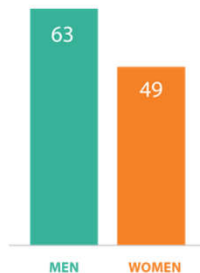
— Brené Brown, *Dare to Lead: Brave Work. Tough Conversations. Whole Hearts.*

Striking differences in how women and men see gender diversity

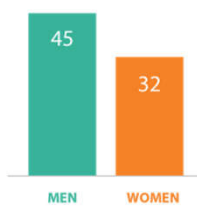
Commitment to gender diversity

% agreeing with statement

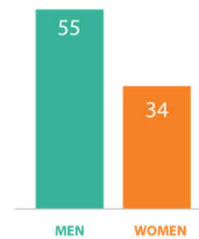
My company is doing what it takes to improve gender diversity



Managers make sure a diversity of voices is represented in decision making



In this company, disrespectful behavior toward women is often or always addressed quickly

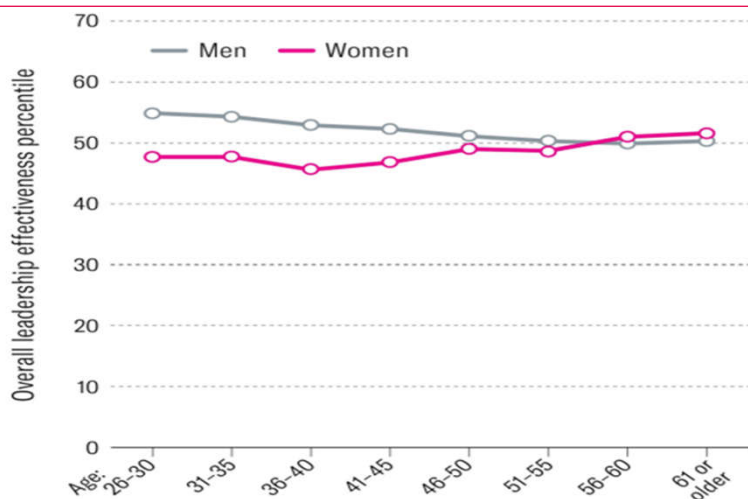


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Gender Inclusion: Women Rate Themselves Less Confident Than Men...Until Their Mid 40's



Women Rate Themselves as More Effective Leaders Later in Their Careers

Men's self-ratings decline over time.

- At younger ages women doubt themselves more than men, but as they age, their self-assessments grow stronger
- Women are FULLY competent leaders
- Lack of representation at the top is NOT due to inability, but other biases and barriers



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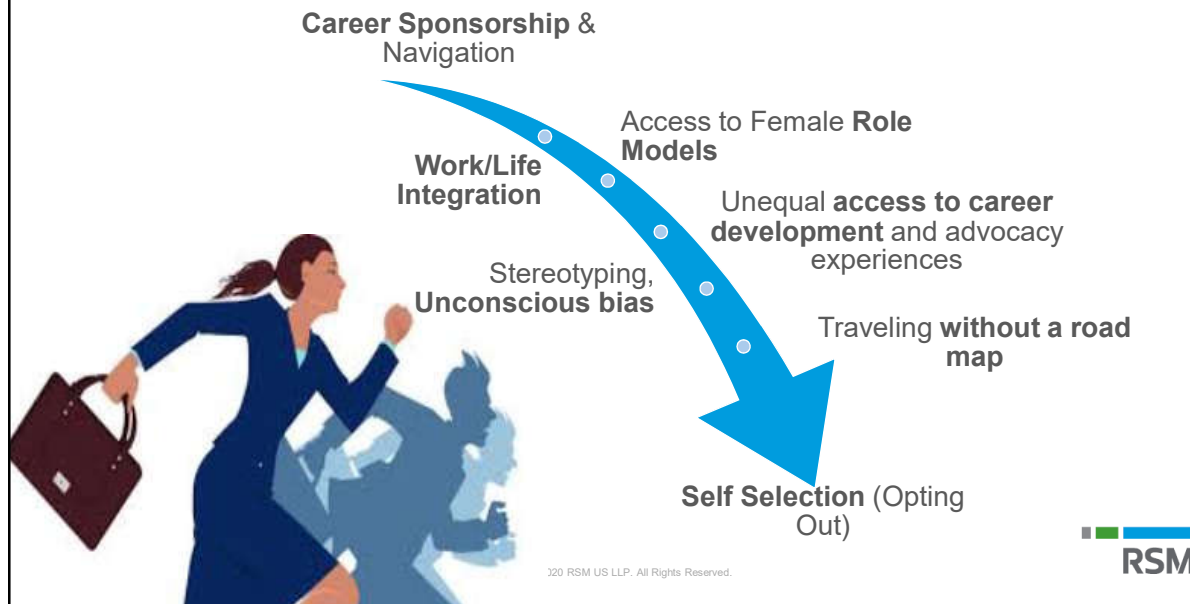
Source: Zenger Folkman 2019

HBR

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The Barriers to Retention and Development of Female Leaders



feist·y
/ 'fɪstē /

The way in which a woman who tirelessly defends a decision or opinion she strongly believes in is described as due to unconscious gender bias.

synonym: determined

de·ter·mined
/ də'tərmənd /

The way in which a man who tirelessly defends a decision or opinion he strongly believes in is described as due to unconscious gender bias.

synonym: feisty



CATALYST

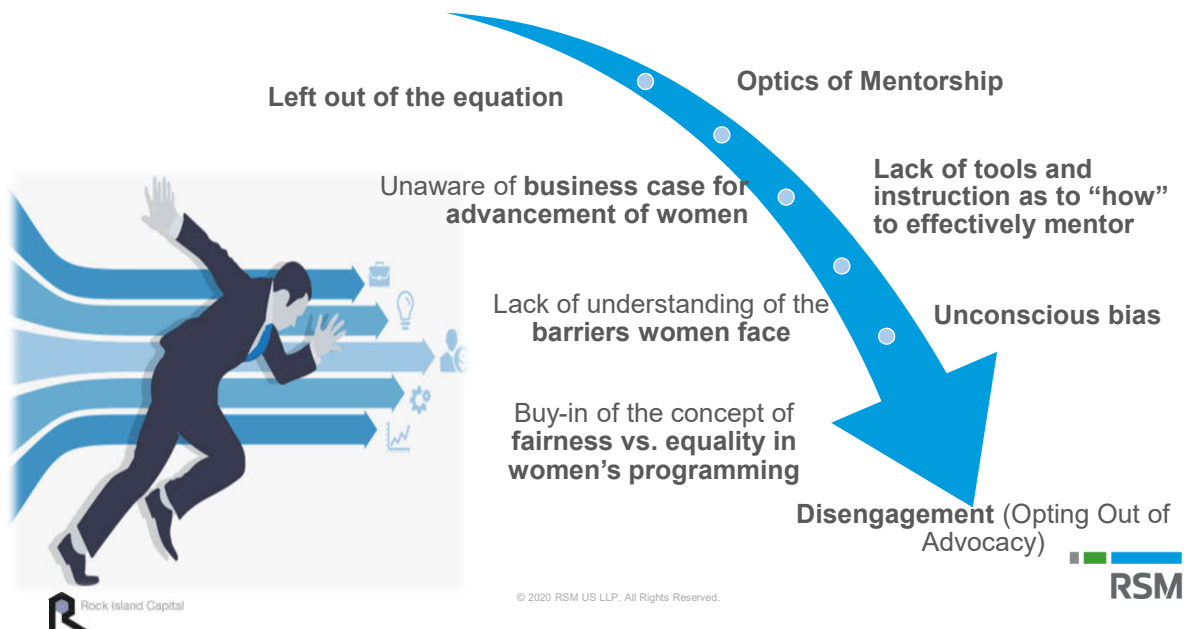
#BiasCorrect
catalyst.org/biascorrect

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Impact: Male Barriers to Retention and Development of Female Leaders



Diverse Teams Scenario



You now lead a team that is more diverse than you had worked with in the past. There are different personalities, people don’t always work well together, and you are faced with the challenge of increasing their effectiveness. It is known that different perspectives leads to higher performance but - ***how do you address the barriers to get a diverse team to collaborate?***

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What Makes Inclusion Work?

In a [cognitive intelligence study](#) done by MIT engineers, researchers observed that successful teams had three things in common:

- They gave one another roughly equal time to talk
- They were sensitive towards each other (even in awkward situations)
- They included more women - making them the most diverse
- The awkwardness that comes with not understanding those around you is what makes diverse teams work so well
- In other words, having different types of people on the same team can help others look at problems more carefully while also being more innovative, creative and inclusive about their solutions



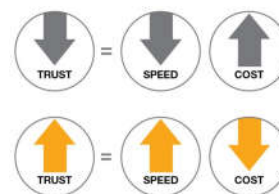
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Trust and Vulnerability

What is it like to work with that person you trust? What is it like to communicate with this person? What are the results of your work?

- People want to be led and inspired
- Trust improves leadership - Energy and joy increase with trust (inspiring our people)
- Trust is learnable - (credibility and our behavior)
- Trust is an economic driver – Trust always affects the speed and cost (**Trust will make us better**)



*"Without **trust** we don't truly collaborate, we merely coordinate or, at best, cooperate. It is **trust** that transforms a group of people into a team."*

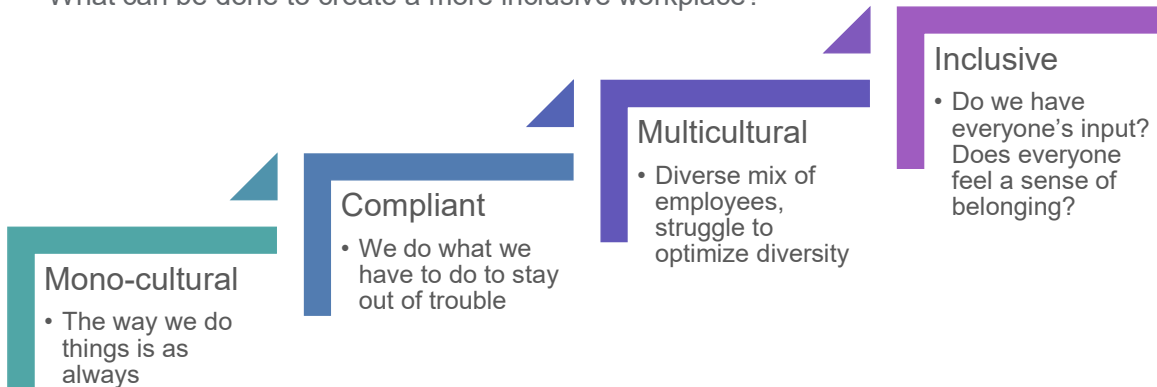


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Where is My Organization Now?

- Your environment can influence workplace behavior patterns
- Assumptions can impact the workplace culture
- What can be done to create a more inclusive workplace?



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INCLUSIVE CULTURE BENEFITS

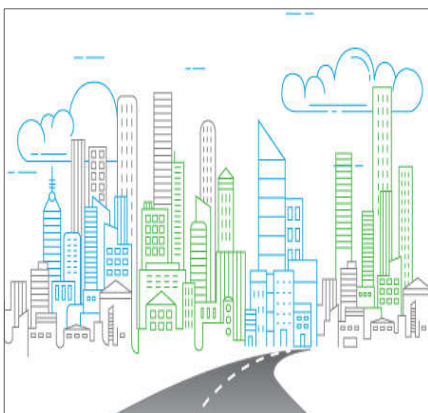
Part Three

The Business of Inclusion

Appreciation for diversity and the achievement of inclusive culture is a differentiator. The business benefits are clear...

Employees of firms with inclusive cultures are **45% more likely to report a growth** in market share over the previous year and **70% more likely to report that the firm captured a new market.**

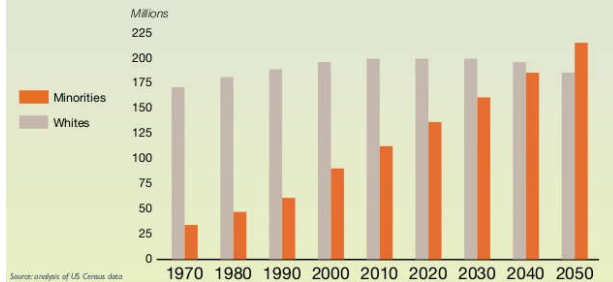
The Power of... Inclusion



The Power of... Inclusion

i Business

U.S. white and minority populations, 1970-2050



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The U.S. in 2050

New population projections from the U.S. Census Bureau:

439 million

Total population

• Current population
305 million

• Population in 2039
400 million

19 million

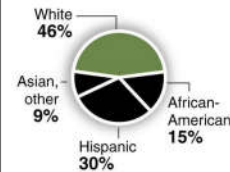
Population 85 and older, more than triple what it is today

• By 2030, one in five will be 65 or older



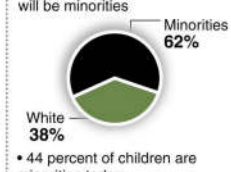
Minorities will be the majority

Adult population



• About 15 percent of current population is Hispanic

Percent of children that will be minorities



• 44 percent of children are minorities today

© 2008 MCT
Source: U.S. Census Bureau
Graphic: Chicago Tribune

The Power of... Inclusion

i Business

COMPANIES WITH INCLUSIVE CULTURES HAVE:



DIVERSITY INC'S
TOP 50 STOCK
INDEX
OUTPERFORMS
DJIA, NASDAQ, AND
S&P 500 FOR 1, 3, &
5 YEAR RETURNS⁴

15X

MORE REVENUE
& SALES FOR
COMPANIES WITH
HIGH LEVELS OF
RACIAL DIVERSITY⁵



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The Power of... Inclusion

\$64 BILLION
TURNOVER COST TO THE
US ECONOMY

80%
WORLD'S TALENT
SOURCE COMPRISED
OF WOMEN AND
PEOPLE OF COLOR²

83% of LGBT
79% of African American
67% of Women of Color
66% of Women
63% of Hispanic
45% of Straight White men

i Behavior

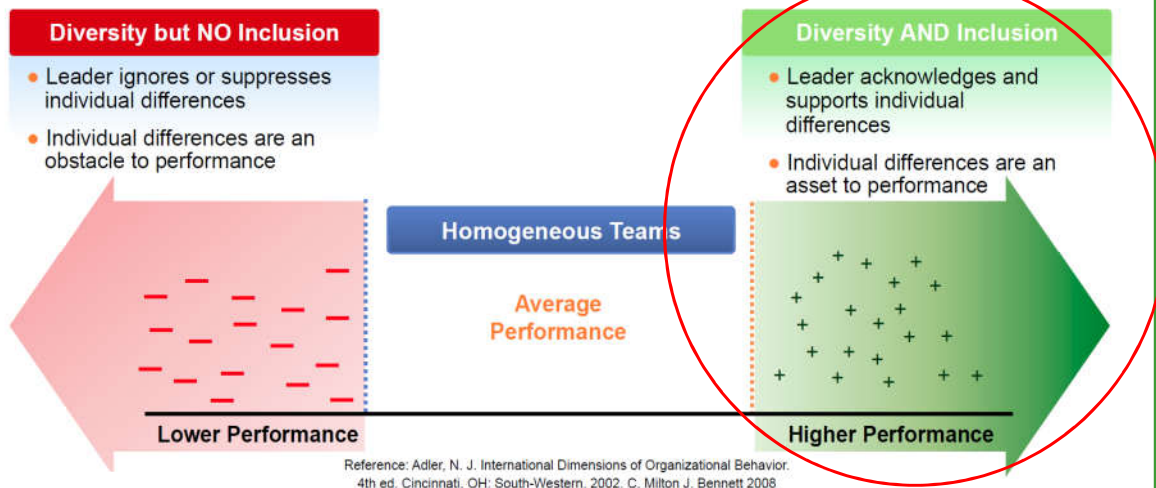


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We need both diversity and inclusion



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Client Scenario



You are in the final stages of being awarded a contract and a client asks you unexpectedly about your diversity data, your inclusion mission and results – and you are stunned and nervous – ***how are you going to address these questions?***



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“Diversity and inclusion is a business imperative. Those who embrace it are likely to prosper, while those who ignore it are more likely to fail...we are here to set the stage and highlight the positive, tangible benefits diversity leads to greater financial performance.”

House Financial Services Subcommittee on Diversity and Inclusion, chaired by U.S. Congresswoman Joyce Beatty (OH-03)



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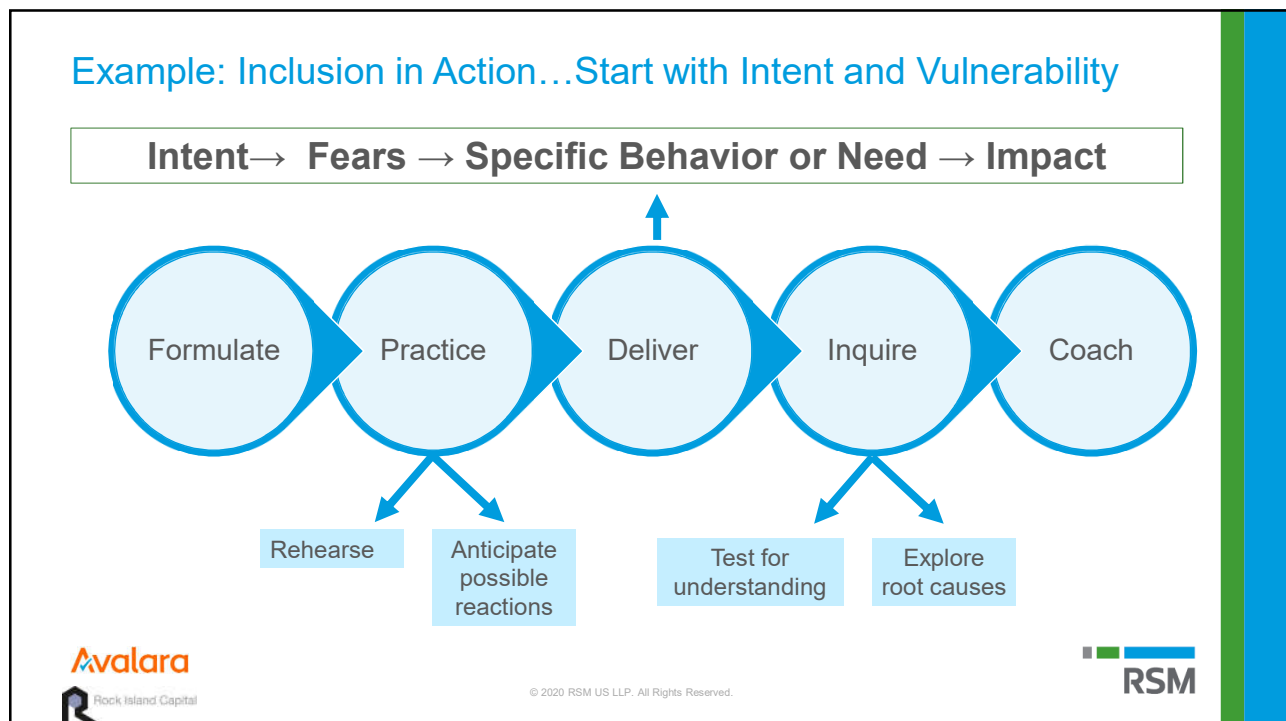
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ALLIANCE IN ACTION

Part Four



Thinking Differently About Diversity

- **Diversity** – The ways we are different; the condition of having unique characteristics. The condition of being diverse: variety, especially the inclusion of diverse people of different races or cultures in a group or organization.
- **Inclusion** – The act or state of being included. Refers to a model work environment that welcomes, values and leverages diversity on all levels.



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Thinking Differently About Diversity

Inclusion

1. An active **process of change** (to include).
2. An **experiential** outcome (to be included).
3. Bringing together and **harnessing diverse perspectives** in a way that is beneficial.
4. Putting the **practice of diversity** into **action**.
5. Creating an environment of **involvement, respect, and connection**—where the richness of ideas, backgrounds and perspectives are harnessed to create business value and overall success.



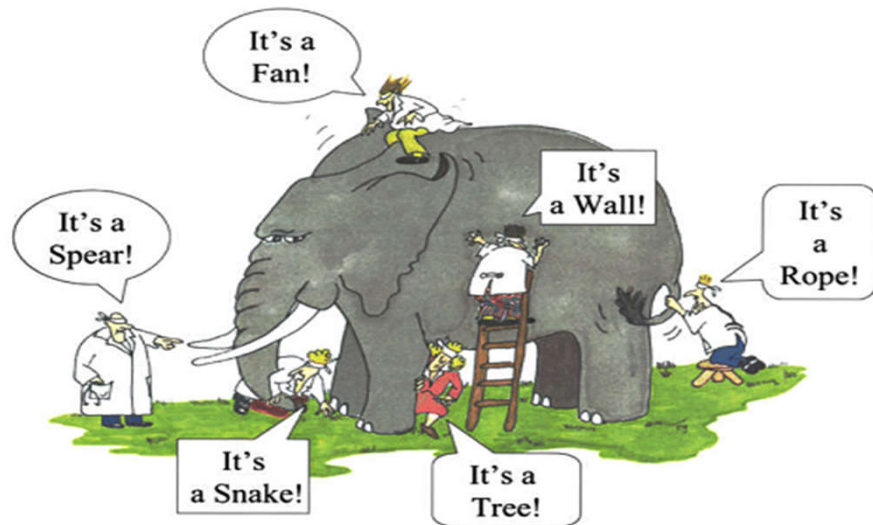
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Thinking Differently About Diversity

Ask
Yourself...

What might
we be
missing?



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I-LEAD: Practicing Inclusive Leadership



Learning

Seek to understand
and learn from people
whose backgrounds
differ from yours



Engaging

Be vulnerable and
invite others to make
meaningful
connections



Asking

Advocate for others
Ask what they are
hoping to accomplish
and how you can
support their vision



Developing

Support by speaking up
for people, especially
on issues of bias,
equity opportunities
and actionable advice



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CEO ACTION PLEDGE



• The Pledge – The event revisited the Pledge signed by over 300 CEO's

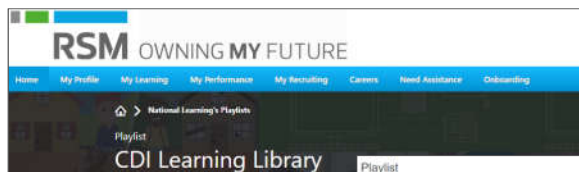
- We will continue to make our workplaces trusting places to have complex, and sometimes difficult, conversations about diversity and inclusion
- We will implement and expand unconscious bias education
- We will share best – and unsuccessful – practices



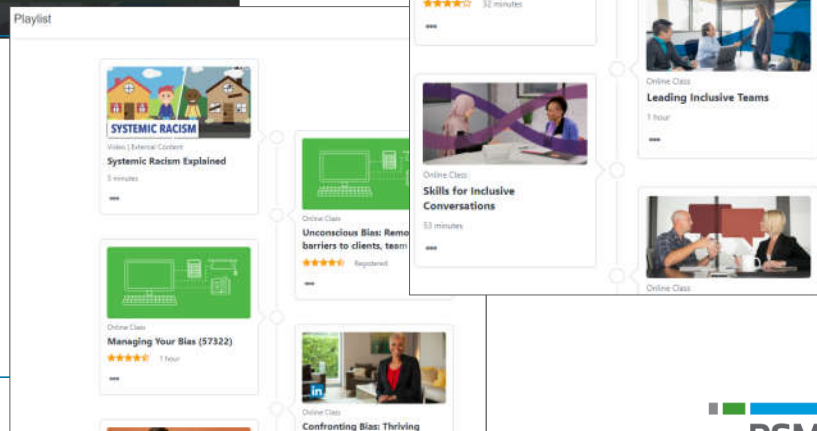
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CDI learning playlist – Owning My Future



- Collection of 16 educational videos, trainings and articles
- CDI Unconscious Bias training and Managing Bias training included
- Topics range from racial understanding to gender bias and skills to becoming a better ally.



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Racial Understanding/Inclusive Learning



[Color Brave Ted Talk](#)



[The \\$100 Race of Life – Youth race explains disparity](#)



[Bryan Stevenson: Facing Down a Violent History](#)



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[Article: 16 Actions for Shifting Culture to Support Black Employees](#)



[Recognizing and rooting out racism: Advice for leaders](#)



Additional Resources

RSM has many resources that are available for our Alliance firms.

For additional resources, please reach out to Steve Kampa.

(Steve.Kampa@rsmus.com)



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