



RECRUITMENT *and* RETENTION TOOLKIT

A Journey Toward a More Inclusive Workforce

AICPA NATIONAL COMMISSION ON DIVERSITY AND INCLUSION





ABOUT THE AICPA

The American Institute of CPAs is the world's largest member association representing the accounting profession with over 400,000 members in 128 countries and a 127-year heritage of serving the public interest. AICPA members represent all areas of practice, including business and industry, public practice, government, education, not-for-profit and consulting. The AICPA sets ethical standards for the profession and U.S. auditing standards for audits of private companies, not-for-profit organizations and federal, state and local governments. It develops and grades the Uniform CPA Examination and offers specialty credentials for CPAs who concentrate on personal financial planning, fraud and forensics, business valuation and information technology. Through a joint venture with the Chartered Institute of Management Accountants, it has established the Chartered Global Management Accountant designation to elevate management accounting globally. The AICPA maintains offices in New York City, Washington, D.C., Durham, North Carolina and Ewing, New Jersey. The AICPA's National Commission on Diversity and Inclusion formed in 2012 to serve as champions for diversity and inclusion within the accounting profession and to propose strategies to recruit, retain and advance diversity in the profession. The National Commission has set a new course to address best practices and develop tools to help the profession succeed in its diversity and inclusion efforts. This toolkit is a demonstration of the National Commission's thought leadership and dedication to the accounting profession.

Acknowledgment

National Commission on Diversity and Inclusion and Ron Taylor of Taylor Alliance for their contributions to this toolkit.

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INTENDED AUDIENCE

This toolkit was written to help leaders understand how recruiting and retaining a diverse workforce can help them better achieve their companies' overall talent recruitment and retention goals. It is also meant to provide support on how to integrate diversity recruiting and retention techniques into broader day-to-day business and personal activities.

This toolkit is aimed at HR leaders, practice leaders and others charged with attracting, recruiting and retaining a diverse workforce in their organization.

A Note to the Leaders

To achieve optimal success, organizations ensure leadership buy-in and support for important initiatives. Diversity and inclusion strategic initiatives are no different. The attraction, recruitment and retention of diverse talent needs the endorsement of top leaders for diversity and inclusion strategies to be embraced by all employees. Here are some ways leaders can demonstrate their support for their organizations' diversity and inclusion efforts:



Informed on the topic

Leaders who are new to diversity and inclusion spend a considerable amount of time studying diversity and inclusion before they make any public statements or commitments. At the least, leaders should know the definitions of “diversity” and “inclusion,” be clear on the business case for their specific organization and know personally where they stand on the topic. Personal reflection is the best education. By understanding your own views, past and present, you can begin to tell credible stories about how your views on diversity and inclusion have evolved over time.

Realistic

Understand that the work of diversity and inclusion does not happen overnight. Diversity and inclusion requires organizational culture change. The diversity and inclusion efforts of an organization should be treated no differently than any other major culture shift or advancement a company is trying to achieve. Change takes time, and having a diversity and inclusion strategy or plan alone is never enough. Even great plans don't get implemented if all the people in your organization haven't embraced the true value of diversity and inclusion.

Committed

Communicate your commitment. Talk up your organization's commitment to diversity initiatives — not just behind closed doors, but in internal and external forums. Leaders should routinely discuss the importance and progress of diversity and inclusion initiatives as a core organizational priority and strategy.

Accountable

Leaders should see themselves not just as speaking on behalf of others who have been given the responsibility for diversity and inclusion initiatives, but as owners of those initiatives. As a leader, hold yourself and your direct staff accountable to all your organization's diversity and inclusion goals. Beyond direct reports, leaders should endeavor to “hardwire” accountability for diversity and inclusion practices throughout the entire organizational structure.

Engaged

Actively engage in the development and execution of a diversity and inclusion strategy and its promotion as a principal goal of the organization. Leaders should be intimately involved with the development of the rationale as well as the practical mechanics of their organizations' diversity and inclusion initiatives, and keep regular track of the progress being made. Leadership by example that is absolutely necessary to sustain effort and enthusiasm for diversity and inclusion initiatives across the entire organization.



HOW TO USE THIS TOOLKIT

This toolkit can be used in its entirety or in its particulars to help focus on high priority areas for your organization. It is designed to address and offer suggestions to organizations that desire a more gender, ethnically, and generationally diverse candidate pool.

The toolkit is broken down into two basic sections. The first, “From Diversity to Inclusion,” is a broad introduction to the business case for making diversity and inclusion initiatives an ongoing part of every company’s culture. The second section provides an outline of the process necessary to make those initiatives a reality, broken down into three major steps: Attraction, Recruitment and Retention. Lastly, the Appendix contains additional references or for those who want to research the subject in more depth.



The outline of each step begins with questions to help you reflect on your organization’s current environment and culture with respect to diversity and inclusion. These questions are not intended merely to provoke, but to genuinely help you develop a roadmap for your organization to more readily reach your diverse workforce recruiting and retention goals.

What is Unconscious Bias?

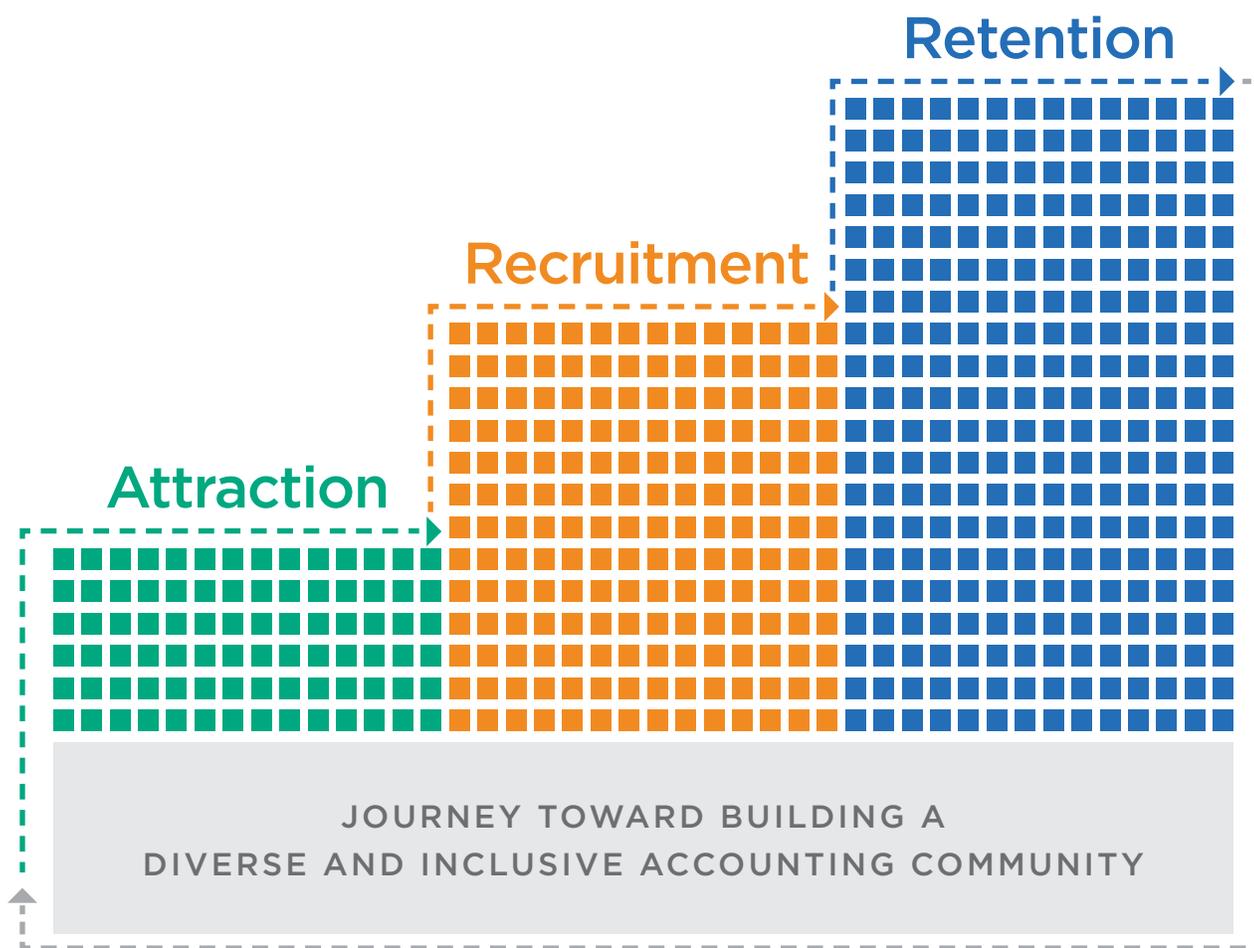
Through each section of the Toolkit we also discuss “unconscious biases” — a critical if somewhat controversial idea that the National Commission on Diversity and Inclusion believes factors strongly into the success or failure of attracting, recruiting and retaining diverse professionals at most organizations.

This toolkit assumes that your organization is already following human resources policies and practices that accord with all applicable federal and other laws that prohibit discrimination.



INTRODUCTION

In the accounting profession, employers are quickly realizing the benefits of hiring from population groups that traditionally have been under-represented in the accounting workforce. The AICPA Recruitment and Retention Toolkit outlines several strategies many organizations employ to recruit and retain a diverse and inclusive workforce.





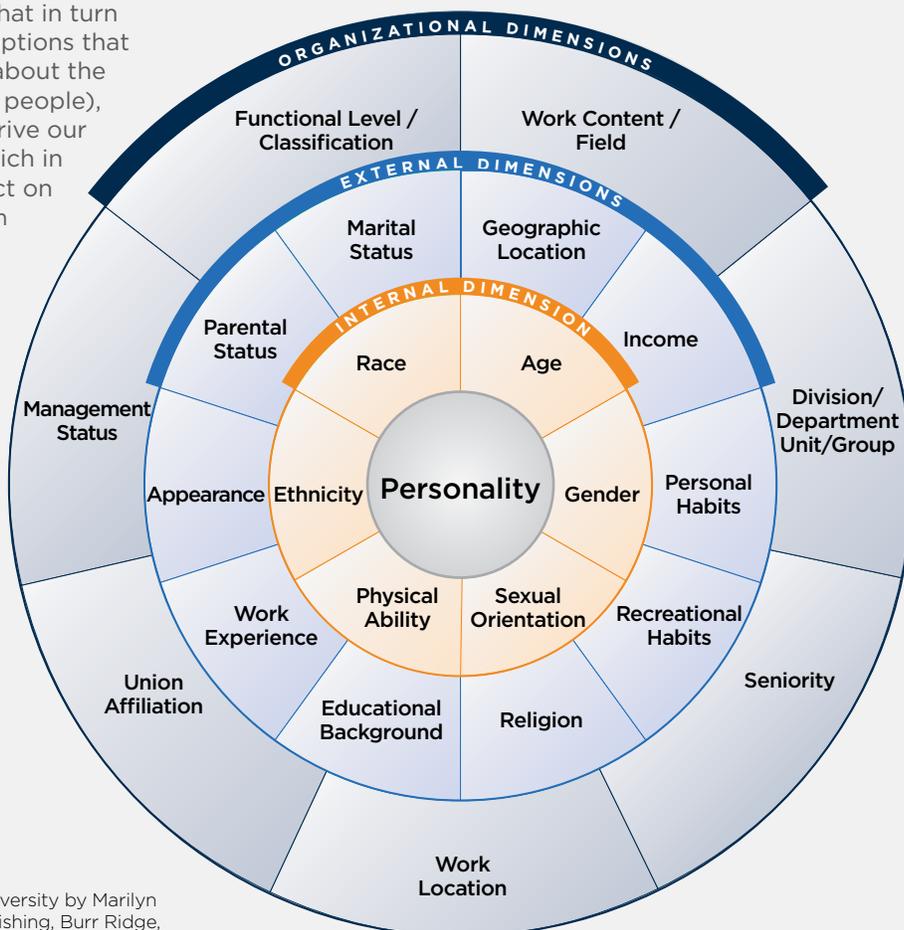
Individuals working in and entering the accounting profession come from different backgrounds and have different perspectives. Learning how to respect and collectively benefit from such differences advances the profession and empowers everyone within it to feel authentic and valued in the workplace.

Attracting, recruiting and retaining a diverse workforce can be something of a struggle for many organizations. While name recognition

may be a deciding factor for some job candidates, it will not be enough to retain a diverse productive, satisfied and loyal workforce long term. Still, when word gets out that your organization is a comfortable, welcoming place for diverse professionals — a company where talent and individual differences are valued and respected — you'll have applicants lining up to join your organization.

Dimensions of Diversity

The “Dimensions of Diversity” wheel shows the complexity of the diversity filters through which all of us process stimuli and information. That in turn leads to the assumptions that we make (usually about the behaviors of other people), which ultimately drive our own behaviors, which in turn have an impact on others. See diagram for more detail.



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Fostering an inclusive environment ensures that employees in your organization are productive, satisfied and loyal. Such employees often also become informal but highly effective recruiters in your diversity search initiatives. Because, as illustrated here, attracting recruiting and retaining talent is an ongoing cycle. One cannot be done successfully without the other.

From Diversity to Inclusion

Some differences we are born with and cannot change. Others we pick up and then shed over the course of time. Inclusion involves bringing together and harnessing a diverse workforce in a way that is beneficial to an organization beyond the benefit of having a diverse workforce for its own sake or to be in compliance with the law. Inclusion goes beyond diversity, putting the concept and practice of diversity into action creating workplace environments characterized by engagement, respect and a sense of connection, where the world's riches of ideas, backgrounds, and perspectives come together to create unprecedented business value and opportunity. Inclusion improves problem-solving and creates a level of innovation not possible in homogeneous environments.



WHY INCLUSION IS IMPORTANT TO THE ACCOUNTING PROFESSION

Improving diversity and inclusion within the accounting profession is important for a number of reasons. Diversity, like rapidly evolving technology or globalization, is a business reality. Trends and changes in technology and global competition require constant adaptations and carry implications for organizational effectiveness and competitiveness. Diversity and Inclusion is no different, they also require adaptation and carry implications for organizational effectiveness and competitiveness. From changing demographics to pure business imperatives, there are a multitude of reasons why the accounting profession should focus on diversity and inclusion today.





Higher Productivity

Many studies demonstrated diverse groups are more productive groups. But none have applied scientific methodology like Scott E. Page, author of *The Difference: How the Power of Diversity Creates Better Groups, Firms, Schools, and Societies*.² Employing a formal predictive model developed in conjunction with Lu Hong, an economist from Loyola University, Page demonstrated that problem-solving is more important to organizational productivity than either technical skills or individual mathematical abilities, and that diverse groups are demonstrably better at problem-solving than homogeneous ones. If everyone in an organization thinks in the same way, Page concludes, then everyone gets stuck in the same place, reducing both productivity and the timeliness of necessary innovation.

Buying Power

If we disregard the data on changing demographics, we also disregard the substantial growth in buying power of diverse markets. The growth of minority populations is predicted to contribute between 44% and 70% to the total growth of U.S. purchasing power from 2000 to 2045. Not only are minority populations increasing as a percentage of the U.S. population, but so is their individual buying power. This growing economic clout is not limited to ethnic or “racial” minorities. The total buying power of the U.S. lesbian, gay, bisexual and transgender (LGBT) adult population for 2013 is projected to be \$830 billion, according to an updated analysis by Witeck Communications. The extraordinary future and present monetary power of diverse markets becomes more apparent each year.

Changing Demographics

Once a largely homogeneous group, the United States has transformed into an evolving mosaic of people of various races, cultures and backgrounds. By 2032, “minorities” will constitute the “majority.” Forward-looking accounting organizations that recognize and understand the implications of these demographic shifts enhance their client focus through improved employee engagement that in turn improves the chances of meeting or exceeding client expectations.

Workforce Diversity

As national and international clients become steadily more diverse, significant portions of the accounting profession’s growth must come from tapping into these diverse markets. If we are to form lasting business relationships with our clients, we must understand their diverse cultures and decision processes, not merely their languages. To do so, we must begin with our profession gaining a reputation for having diverse and inclusive workplaces.

Business Imperative

In order for our profession to remain relevant in an ever-evolving global market and to remain competitive for talent and clients, it is imperative that we attract and value diverse talent, and in turn enable that talent to attract and value diverse clients.

It is well-known that diverse, heterogeneous teams promote creativity and innovation. Only by fully embracing diversity and maximizing the well-being and contribution of everyone within it can we fully maximize the strength and relevance of the accounting profession both domestically and globally. We must encourage everyone in the profession to reach his or her full potential and never let anyone be either advantaged or disadvantaged by his or her apparent “differences.”

² Page, Scott E. *The Difference: How the Power of Diversity Creates Better Groups, Firms, Schools, and Societies*. Princeton and New York: Princeton University Press, 2008.



Other examples of diversity and inclusion benefits to the accounting profession include:

Optimizing Performance

Employees are more productive when they can bring their entire “genuine” selves to the workplace and do not feel threatened or judged for being “authentic.” When diversity is embraced as part of an organization’s culture, employees become more effective, generally increasing the financial performance of the company.³

Sustaining Innovation

A diverse workforce brings organizations a consistent influx of ideas for new products, services and processes. Research has shown that heterogeneous groups outperform homogeneous groups, if the diversity is intelligently managed. It goes without saying that a constant source of innovation naturally enhances any organization’s competitive advantage.

Improving Teamwork

Increasingly, employees are working in teams. Moreover, many quality and other important initiatives rely on effective teamwork. By increasing effective communication between diverse employee groups, organizations inherently improve the overall functioning of employee teams.

Improving Global Competency

Diversity initiatives help organizations become sensitive to the world’s many cultural differences. Developing this sensitivity is vital in order to compete in today’s global marketplace. Mastering diversity and inclusion improves an organization’s ability, and substantially deepens the resources at its disposal, to handle the cultural complexities of the new global marketplace.

Enhancing the Success of Acquisitions

Organizational success is often predicated upon how quickly organizations can integrate the values and styles of different cultural backgrounds, especially in the aftermath of major international acquisitions or mergers. A diverse and inclusive workforce brings to the table more and deeper skills for handling complex international work-force amalgamations and for better managing change across newly global enterprises.

Reducing the Cost of Discrimination and Harassment Suits

A proactive diversity effort can help prevent costly discrimination and harassment suits. In addition to the dollar cost of any settlement, negative publicity can harm a company’s reputation forever, negatively impacting sales and recruiting programs well into the future.

Improving Morale and Reducing Workforce Turnover Costs

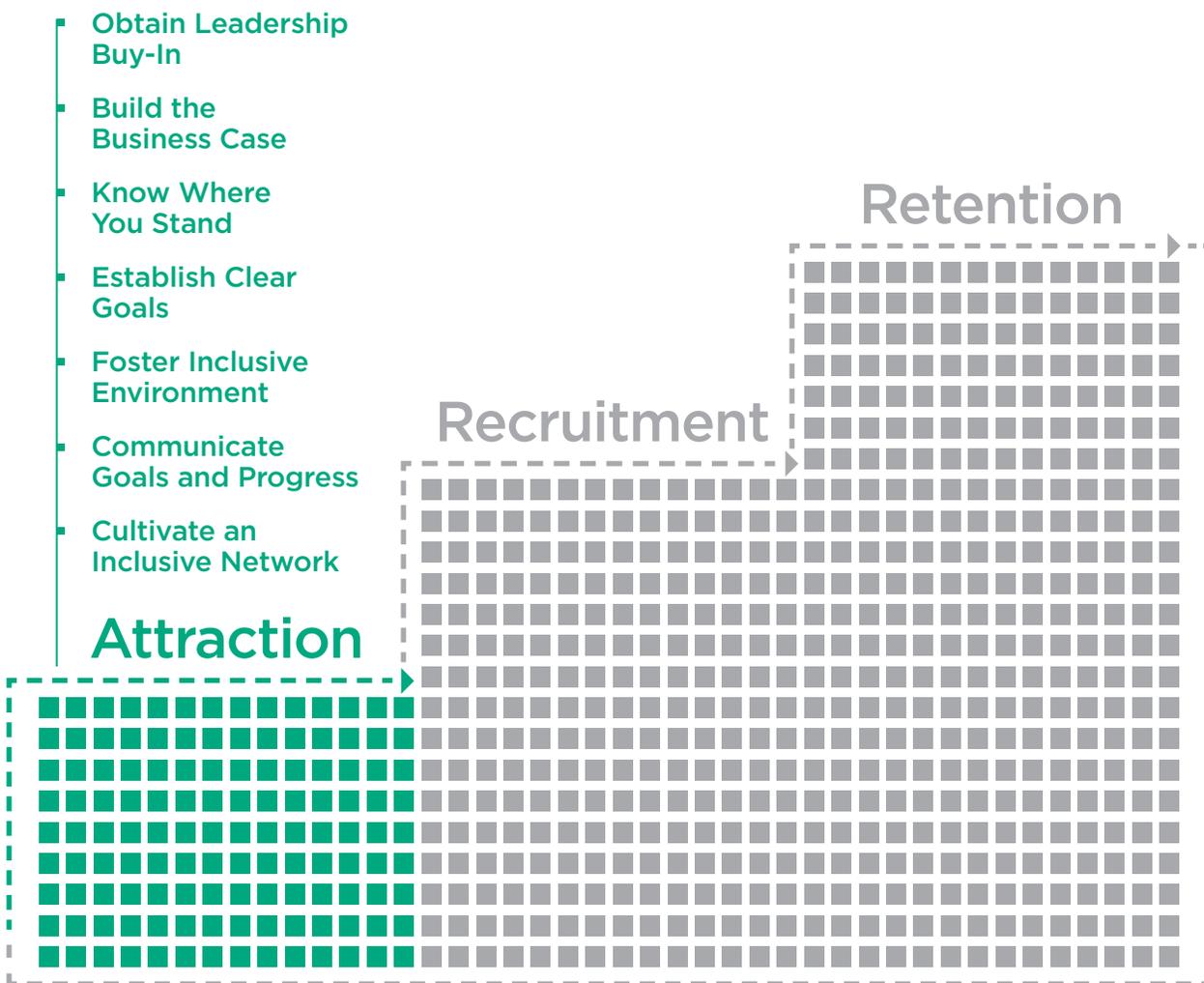
Implementing workplace policies that benefit all employees’ unique needs and help boost morale and retention is not simply a “nice” thing for businesses to do for their employees, it also makes good business sense. Maintaining a stable workforce by reducing employee turnover through better benefits and flexible workplace policies often results in significant long-term cost savings.⁴

³ Leader’s Toolkit on Diversity
⁴ Center for American Progress



PHASE

ATTRACTION





Before You Begin

think about the following questions

- » Can candidates easily learn more about your commitment to diversity and inclusion online?
- » In your organization, do senior leaders publicly support diversity and inclusion initiatives?
- » Does your organization support organizations or community events where a diverse mix of attendees is present?
- » Does your organization have a formal diversity and inclusion strategy, and are you tracking the results?
- » Would diverse talent be able to identify mentors or role models that look like them at all levels in the organization?

Many of these questions can be found in AICPA's Accounting Inclusion Maturity Model, an assessment designed to help accounting firms and organizations know where they are in their diversity maturity and to help them along a path of workplace inclusion.

Getting Started

Your organization's reputation as a diverse and inclusive employer will precede you. As a result, your diversity recruiting process should start long before the first interview. Before beginning a diversity recruiting program, you should do an internal assessment of where your organization stands with respect to diversity and inclusion. A thorough assessment of your organization's culture, and its capacity not only to hire diverse professionals but to become an environment where those professionals can comfortably be their "authentic" selves, is the real key to attracting, recruiting and retaining top talent.

Below we discuss in some depth the basic steps for overcoming these sometimes deeply-seated cultural barriers, so that your organization can enjoy a richer mix of persons and personalities, and be better positioned to remain relevant and competitive in the face of the United States' rapidly changing demographics.



Action Steps

1 STEP

Obtain leadership buy-in. Upper management needs to fully support and explain to the entire organization the need for diversity in the employee population for the continuing success of your business. Leaders should communicate in detail to those who will be doing the hiring, as well as those referring candidates, the organization’s overall diversity and inclusion commitment, what its goals are, how the diversity recruiting program works, and how the program’s success will be measured.

2 STEP

Build the business case. The most unfortunate but sadly pervasive diversity myth is that hiring for diversity necessarily sacrifices candidate quality. Organizations focused solely on meeting diversity hiring goals without regard to quality unfortunately perpetuate this myth, which is why it is a considerable amount of time to be spend on getting buy-in for the business case for diversity and inclusion in your firm. Part of what makes the quality versus diversity issue a difficult one is that human beings “naturally” attach certain beliefs to the work, talent or the performance ability of other individuals or groups. These assumptions and stereotypes are based on direct and indirect experiences and attitudes beginning in childhood. This is why a focus on unconscious bias throughout this toolkit is a critical component of retaining a diverse workforce. Left unexamined, unconscious bias can undermine your organization’s efforts to recruit, retain and advance diverse talent, and the myth that diversity is the natural enemy of quality will retain its pull.

What is Unconscious Bias?



Unconscious biases are simply our natural people preferences. Biologically we are hardwired to prefer people who look like us, sound like us and share our interests. When looking to increase the number of diverse hires within your organization, a critical first step is to address unconscious bias across the organization, helping management and staff understand the importance of diversity awareness, and communicating about and managing constructive conflict. There are several professional diversity organizations that can help your company understand and put in place a strategy for driving awareness of unconscious bias in the workplace and mitigate its impact on your recruiting process.

[Recognizing Unconscious Bias](#)

[Combating Unconscious Bias](#)



FAIR ISN'T
EVERYONE
GETTING THE
SAME THING.

FAIR IS
EVERYONE
GETTING
**WHAT HE OR
SHE NEEDS**
IN ORDER
TO BE
SUCCESSFUL!

3 STEP

Know where you stand. Assess your current employee engagement results and build a transparent understanding of whether your employees are satisfied with the prevailing opportunities for creating a more inclusive work environment. Consider acquiring outside data on perceptions of your organization with respect to diversity and inclusion, which can shed light on how your organization is viewed by clients, colleagues and potential candidates. Research and understand your current workforce demographics. This research should begin by looking at the ethnic, racial, gender and generational composition of your existing workforce and then comparing that to external benchmarks like census labor data for your region(s) of operation. A comparative analysis of this kind will shed light on your organization's overall inclusiveness — or lack thereof — with respect to the general population and the broader accounting industry. It is probably useful to segment this analysis by employment tier to understand whether you have diversity, for instance, only among mid-level, line or administrative employees, and not among senior partners and management. If that's the case, your workplace cannot be truly inclusive.

4 STEP

Establish clear short-term and long-term goals. Remaining competitive in the “war for talent” is critical in both the short term and the long term, and you should establish clear goals for both. Short-term goals might largely revolve around recruiting to immediately increase the diversity of your workplace. Long-term goals mean investing in relationships with people and institutions, like schools and fraternal organizations, or participating in sponsored diversity events, to raise your profile with, and attractiveness to, potential diversity candidates. Spell out your long- and short-term goals concretely and ensure each goal is assigned to someone in your organization who has real accountability and will be held responsible for reaching them.



5 STEP

Foster an inclusive environment. Fostering an inclusive environment begins with the understanding that fair isn't everyone getting the same thing but rather everyone being quipped with the tools he or she needs to be successful. Fostering an inclusive

environment also requires a significant amount of change management — a cultural shift that does not happen overnight. Therefore, transparency and clear communication about such efforts will go a long way in helping garner support from everyone in the organization. Build credibility with your diverse workforce. Real credibility will give you permission to inquire and have breakthrough conversations that will accelerate the inclusive environment you're building. Keep in mind, culture change takes time: This cannot be viewed as a one-time program. In order to truly shape culture, everyone will need to recognize that it takes a long-term commitment.

Accommodating Employee Needs

Understanding the needs of your employees can be best done through focus groups or employee engagement surveys. *Accommodating* has a broad meaning in today's workforce. It is not limited to the historical context of disability but rather focuses on the unique needs of a diverse and multicultural workforce. Often managers find themselves in difficult situations when employees have different needs but managers want to treat everyone equally. However, equal treatment does not translate automatically into fairness. Fairness may require instead an extra focus on the unique needs of diverse groups with an eye toward extra tolerance and understanding of unique circumstances that must be addressed for specific professionals to become and remain successful.

Dimensions of Tolerance and Acceptance



PHYSICAL OR COGNITIVE ABILITIES

Ensure your workplace goes above and beyond to support the needs of employees who have visible or invisible disabilities.



SEXUAL ORIENTATION

Your clear and visible commitment to the well-being of LGBTQ employees on the job is vital. If you haven't already done so, review policies on benefits for partners, bereavement leave, gender transition guidelines and other pertinent legal and financial issues.



RELIGION

Consider modifying time-off and vacation policies to better accommodate diverse religious beliefs.



LANGUAGE

Support non-English speaking staff by offering English as a Second Language and other programs that build clarity and confidence in English proficiency.



FAMILY RESPONSIBILITIES

Caregivers for the young or elderly parents may need more flexible work schedules. Be open to discussing flexible work schedules whenever they can be implemented with minimal productivity loss.

Inclusion focuses on the unique needs of the individual and in the context of fairness particularly, must speak to applying tolerance and understanding to situations so that individuals are able to get what they need to be successful. Treating everyone the same may in fact be the best recipe for falling short of meeting everyone's unique needs and supporting their optimal individual productivity.



Networking Outside the Workplace

Take advantage of opportunities to network with diverse professional

organizations and campus diversity groups. Encourage current employees to join diverse organizations and become actively engaged in identifying diverse talent. Non-diverse recruiters should also be comfortable networking with organizations that represent diverse populations, like NABA, ALPFA, Ascend, HRC, or AWS CPA. (Many additional similar organizations are listed in the Appendix.) Be sure to include non-diverse employees in your diversity recruiting activities: Diverse candidates can sometimes be turned off when you send only your diverse professionals to diversity recruiting or networking events. By training everyone within your organization to increase his or her awareness and ability to articulate your organization's diversity and inclusion commitment, recruiters, hiring managers, partners and other senior leadership will be better equipped to recruit across diverse spectrums.

RECRUITMENT AND RETENTION TOOLKIT

6 STEP

Communicate goals and progress.

Communicate your organization's position on diversity and inclusion and the benefits of diversity and inclusion to the organization's overall strategy. It is important that leaders within your organization discuss the value of diversity and inclusion in depth with both internal and external stakeholders. Use all corporate communication channels, such as your website, company newsletters and press releases, to profile the accomplishments and advancements of your inclusive work environment. Be active in drawing attention to how diverse employees are succeeding in your organization and to the opportunities available to qualified employees along all diversity dimensions.⁵ After checking with appropriate management, consider publicly sharing your above-average workforce demographics, or applying for one of the many available diversity awards.

7 STEP

Cultivate an inclusive external network.

Simply put, this means getting involved. Participate in local minority organizations by sponsoring or contributing to a local or national event or organization. Make employees available to speak at diversity- and inclusion-related conferences, or provide scholarships for minority students at a local college. Generally, all candidates will naturally be attracted to organizations that have a public reputation for promoting a culture of inclusion and respect and are known for valuing all of their people. Candidates from under-represented backgrounds may especially recognize and appreciate this kind of sincere effort that extends beyond the everyday recruiting process.

[Create Our Action Plan](#)

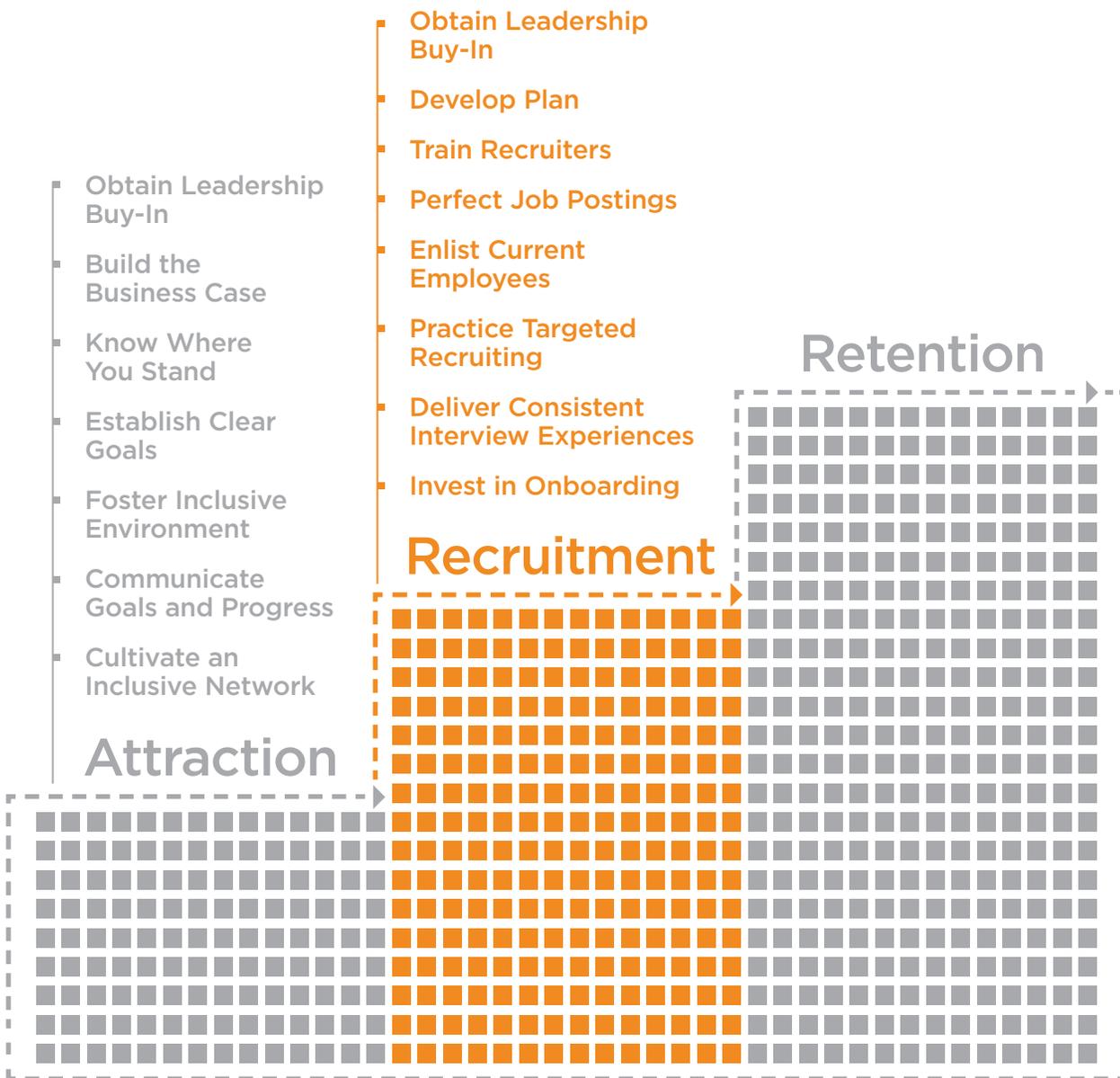
⁵ ICS—International Search Consultants



2

PHASE

RECRUITMENT





Before You Begin

think about the following questions

- » When it comes to recruiting diverse talent, which of the following are included in your recruiting approach/strategy?
 - Scholarships
 - Internships
 - University/graduate schools
 - Search firms
 - Diversity-focused job fairs
 - Employee referrals
 - Diversity-focused employment portals
 - Word of mouth
 - Diversity or special-interest-focused job websites
 - Recruiters dedicated or tasked with a focus on diverse talent
- » Does your organization require recruiters to present a diverse slate of candidates from which the hiring manager will select?
- » Does your organization require external search firms to present a diverse slate of candidates?
- » Are all candidates for a particular job asked the same questions, and do all follow the same process?
- » Do interviewers and managers recognize and compensate for their own hiring preferences?

Getting Started

In order to attract, recruit and retain top diverse professionals, companies should start by understanding where they stand with respect to diversity relative to other similar companies, and articulating to all employees that they share some part of the responsibility for building a diverse and inclusive organization. The responsibility for recruiting diverse professionals is often placed with the recruiting department alone, with very little guidance, direction or understanding from management as to why it is important. This approach usually leaves recruiters no alternative but to make a well-intentioned but insufficient attempt at adding diverse candidates to their pool of potential recruits, usually not venturing beyond the most popular or likely candidate sources. This inevitably leads to complaints that qualified diverse candidates aren't out there or are so few in number that competitive organizations get to them first.



Action Steps

1 STEP

Obtain leadership buy-in. As discussed in Part I, upper management needs to fully support and explain to the entire organization the value of diversity in the employee population for the continuing success of your business.

2 STEP

Develop a recruiting plan. A strong recruiting plan consists of specific action steps taken in response to issues identified after a thorough organizational assessment of where your organization stands with respect to diversity and inclusion, such as the one suggested in Phase I, Step 3 of this toolkit. Effective recruiting plans demand specific, defined outcomes and, even more important, specific benchmarks defined by quantifiable metrics. Concrete recruiting plans are like a kind of “diversity GPS”: who would travel without one today?

3 STEP

Train recruiters on the value of a diverse workforce. Your recruiters, both formal and informal, are often the first point of contact for many candidates. They should be champions of your diversity and inclusion initiatives and know the value of a diverse workforce. They should be prepared to answer all questions regarding your organization’s attitudes, history and intentions. Make sure they understand that diversity and inclusion training is intended to help them, along with any other interviewers and hiring managers, understand cultural and diverse nuances that can weigh on a candidate’s decision. Keep in mind that not only are you interviewing the potential candidate but the candidate is also interviewing your organization. Ensuring that interviewers are professional and accurately represent your organization’s values and position is important to your organization’s reputation and future success.

Recognizing Unconscious Bias



Recognizing the difference between a bias and a “first impression” is critical when recruiting diverse candidates.

“First impressions” about what someone is like are probably not biases if we easily change our mind when we realize we have been mistaken.

Some indicators of actual bias might be if:

- ... we feel betrayed and upset when the object of our first assumption turns out not to be as we expected.
- ... when we learn that our first assumption is wrong, we decide the individual to be an exception to the rule.

Some examples of unconscious bias in action in a workplace might include:

- A hiring manager skips over on a diverse candidate because the candidate’s name seemed to him foreign or hard to pronounce.
- A recruiter prefers a candidate whose appearance and manner are similar to her own.
- A partner selects a young male candidate who reminds him of himself and attended his alma mater.

What is Unconscious Bias?

Combating Unconscious Bias



Turning Employees into Inclusion Champions

Identify top-performing employees from various

back-grounds in your organization who have the skills, experience and traits you are looking for. Come up with a questionnaire that asks them the professional events they attend, the journals they read, communication channels they use most and anything else to help you find others like them.

Consider building an employee referral program that provides bonuses to employees who refer others. Engaging current employees from under-represented demographics with referral bonus opportunities can dramatically expand your talent pool of diverse candidates.

If you have a marketing department, it can help you gather information, or you can get assistance from an outside research firm if needed. Focus groups and individual (one-to-one) meetings with diverse professionals within your organization are also excellent ways to gather information. Keep focus groups small and relatively informal.

4 STEP

Perfect your job postings. In job descriptions, don't just list job requirements, but focus on how candidates will contribute to the bigger picture. The better the job description, the more candidates (of all backgrounds) will want to apply. Be sure the job description absolutely matches the job you are hiring for. Nothing is more frustrating than a candidate finding out the job is different from the job description.

5 STEP

Enlist current employees as recruiters. Employees outside the recruiting function cannot assist in identifying talent if they're not aware the organization is hiring. Internal marketing of open positions, taking advantage of internal diversity networks and affinity groups, and tapping other internal sources are a great ways to increase the flow of diverse prospects. Incorporating both internal and external social media is an excellent way to share information regarding your diversity initiatives. If employees refer candidates, follow up as a courtesy and to ensure employees continue to send you referrals.

6 STEP

Practice targeted recruiting. In addition to sourcing candidates through traditional methods, your organization should also look to target diverse professionals with job postings in publications and on websites of diversity-related organizations like NABA, ALPFA, Ascend and others. See the "Sample List of Diversity-Related Organizations" at the Appendix of this toolkit for just a small sampling of existing organizations.



7 STEP

Create and deliver consistent interview experiences for all candidates. You want to be sure your interview process follows standard guidelines. It's important that everyone is interviewing from the same playbook. Make sure everyone has the job description and is clear on what the hiring manager is looking for. Recruiters and interviewers must feel empowered to present diverse candidate slates. Give everyone a standard set of questions to ask all candidates. Having a diverse panel of interviewers can offer different perspectives on the candidates, potential and help in convincing diverse professionals to join your organization.

8 STEP

Invest in effective onboarding for your new employees. Recruiting doesn't end when your diverse candidates sign on the dotted line. Their onboarding experience impacts how your reputation will be shared with their network. Always assign new hires at least one "onboarding buddy" who helps them navigate the new culture.

Cultivating the "Passive" Candidate



Don't exclude approaching "passive" diversity candidates, those who may not be actively looking for a new position but meet the needs of the positions you are recruiting for. One excellent way to do this is through sponsorship relationships with diverse organizations. Diverse professionals, especially more seasoned professionals maybe open to new opportunities. You typically won't find these seasoned individuals at career fairs. But professional networking events hosted by NABA, ALPFA, Ascend and other similar organizations held throughout the year provide a great way to maintain contact and familiarize yourself and your firm with a pool of qualified professionals you might not otherwise identify. Also consider becoming active on websites like LinkedIn, where company alumni and other groups provide an excellent resource for identifying qualified passive candidates as well as opportunities to tout your firm's diversity and inclusion initiatives and success stories.



Effective Onboarding

Below are some tips on how to make new employees feel truly welcome and included in your firm.

> **Introduce your new employees before they arrive.** It's natural to introduce your new employees to fellow associates upon their arrival, but it helps if the hiring manager also shares something about new employees prior to their arrival. Through email, announce your new hires and give their backgrounds, roles and responsibilities, so that everyone knows what to expect. It also helps to add your new employees to internal company announcements, sending a clear message that they are welcome and that a lot of preparation went into preparing their new work environment.

> **Identify onboarding buddies for new employees.** To help your employees navigate the corporate culture, assign them a well-respected and knowledgeable onboarding buddy. This person should be responsible for helping your new employee get introduced to key personnel in the organization and for being a person whom the new employee can contact should he or she have any general organizational questions.

> **Set clear expectations for new employees.** Not only set clear expectations but also realistic expectations. New employees should have a written outline of their job function, responsibilities and performance expectations, which should be reviewed at 30-, 60- and 90-day intervals. This eliminates confusion on both ends.

> **Train new employees.** Give your new employees time to not only absorb the new culture but also time to take all necessary training. Skipping key introductory training is a recipe for missteps later in their tenure with the organization.

> **Share unspoken rules and expected workplace etiquette.** Meet diverse employees where they are. While every employee wrestles with being effective in all areas of their lives, there are sometimes extenuating circumstances that should be considered when working with diverse employees. For many diverse students and professionals entering the accounting profession, they may be the first in their families to be exposed such a workplace environment. As such, they may need clear examples of what is acceptable behavior at their new job. Some instances where concrete guidance might be helpful include:

- What does casual business attire mean?
- How should I dress to meet clients?
- What constitutes being on time?

Part of the challenge for organizations with new diverse hires is gauging the appropriate amount of assistance to offer. Be ready to assign your highest-performing diverse professionals to serve as mentors, coaches and sponsors, both inside and outside of the organization.

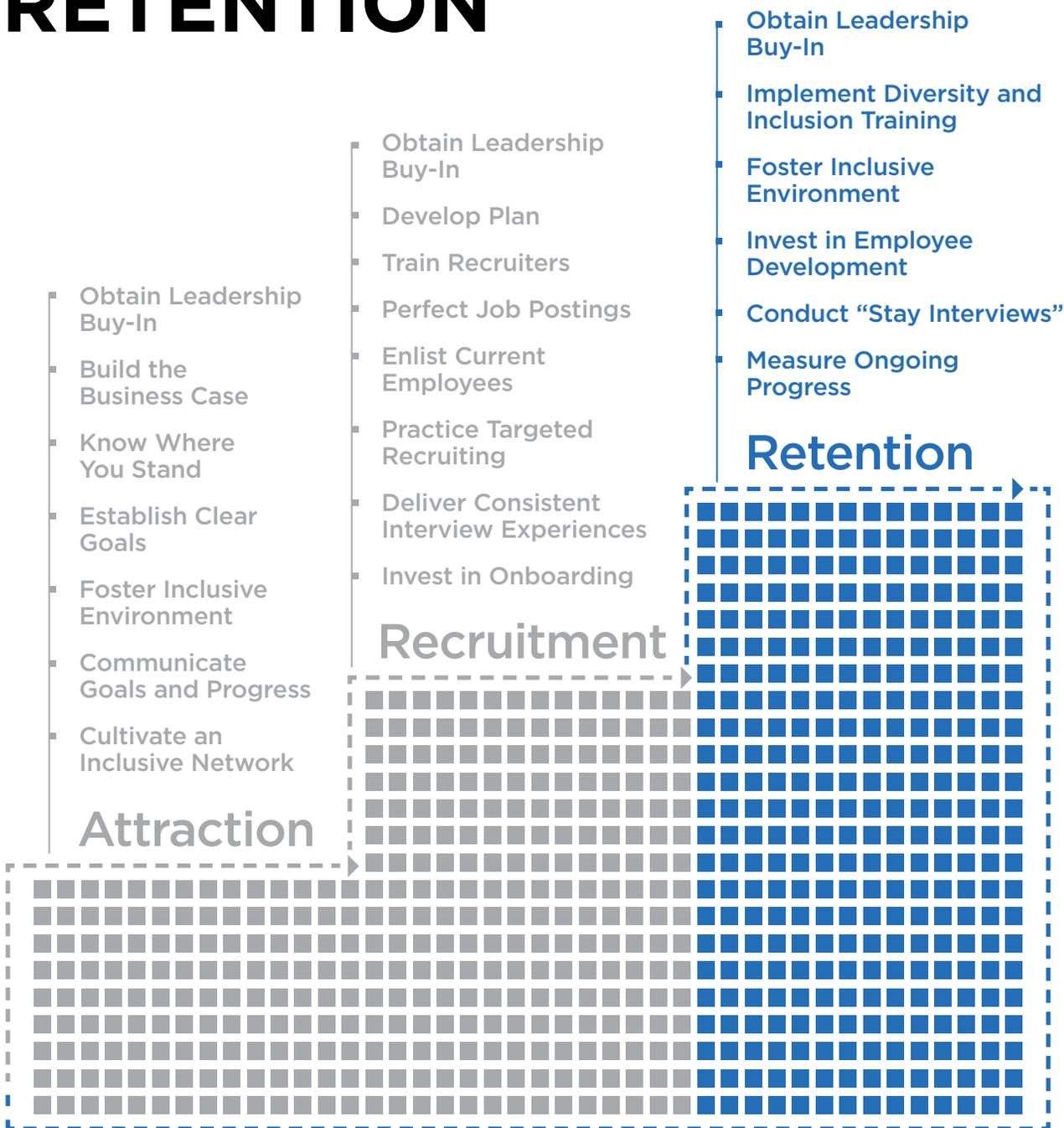




3

PHASE

RETENTION





Before You Begin

think about the following questions

- » How frequently are all employees in your organization trained on diversity and inclusion?
- » In your organization, do leaders receive coaching in diversity and inclusion as well as provide coaching to others?
- » Does your organization have and exercise a talent retention strategy? If so, does it specifically address diverse talent retention?

Getting Started

Retaining a diverse workforce involves, in the end, many of the same techniques involved in attracting and recruiting a diverse workforce.

Begin by reassessing where your organization stands internally and externally with respect to diversity. A good indicator of an inclusive environment is the retention and advancement of traditionally under-represented individuals such as women and ethnic minorities. Researching and understanding areas that may be impacting retention of high performers is a critical step in helping to retain diverse individuals. The AICPA Diversity Maturity Model is an excellent tool to assist organizations with this assessment. In it, you'll see how by recognizing that every employee is accountable for retention, your organization can benefit greatly across the board from retention efforts focused on diverse professionals. In the end, organizations too often fall victim to the belief that retention efforts start only when an employee announces an impending departure. Instead, organizations must come to understand that productive retention efforts require diligence across the entire career trajectory of all professionals.



Action Steps

1 STEP

Obtain leadership buy-in. As discussed in Parts I and II, senior leadership needs to fully support and explain to the entire organization the value of diversity in the employee population for the continuing success of your business.

2 STEP

Implement organization-wide diversity and inclusion training. A multitude of training vendors offer organizations both online and in-person training on diversity, inclusion, unconscious bias and cultural competency.

The value of the entire workforce receiving this training is in the resulting support across your organization for full deployment of your diversity and inclusion strategies and across-the-board accountability and responsibility for related goals. The training itself offers employees perspective on working with others who come from different backgrounds and on effectively engaging diverse “others” in a productive manner.

3 STEP

Foster an inclusive environment. Although this was discussed at length in Phase I — Attracting, it bears repeating. Intentionally creating an environment of inclusion not only attracts talent to your organization but also helps you retain such talent in your organization. (For more on fostering an inclusive environment, [see Phase I, Step 5 on page 14.](#))



Combating Unconscious Bias



When hiring or promoting, it is important to ask the question, might our unconscious biases be getting in our way of hiring and promoting top talent inclusively?

Unconscious bias is not something that can be covered in one training. Because we all have inherent, socialized biases, it is important that your firm continually addresses unconscious bias in the workplace. It is essential for those responsible for inclusive recruiting and retention to become aware of their own potential ongoing biases and stereotypes and their possible impact on your organization’s work environment and culture.

Professional organizations that specialize in unconscious bias and implicit association testing can be a great resource. Creating structured, professional forums for existing employees is another avenue worth exploring. Professionally facilitated conversations about differences and unconscious bias are the most effective way to mitigate the effects of our own biases on the work environment. Avoid the mistake one manager at a financial services firm made when he responded to a request to support a professional Asian organization by saying, “we have enough Asians.” Clearly this individual was missing the point of building an inclusive environment.

What is Unconscious Bias?

Recognizing Unconscious Bias





Steps for Building an Effective Mentoring Program

- Develop program goals
- Choose a mentoring model (formal or informal)
- Identify the selection criteria for mentors and mentees
- Define other critical elements of the program (for example, job shadowing, specific training and development, etc.)
- Recruit and interview potential candidates
- Match participants
- Evaluate results at regular intervals

4 STEP

Invest in employee performance and development.

Employee productivity depends, in many ways, on the full use of every employee's skills and talents. Knowing the strengths and ambitions of each of your employees, and offering them appropriate opportunities to upgrade or expand their skillsets, will ultimately benefit you, your organization and your business, as well as the individual employee. This can only happen when managers and line employees alike are comfortable providing authentic cross-cultural feedback without fear of discrimination, retaliation or harassment. Mentoring and sponsorship programs have proved especially effective in creating and maintaining transparent communication channels across every level of the organization.

Advancing Employee Performance

Evaluate and determine what leadership competencies are promoted in your company.

Without reference to any individual, leaders should list the skills, competencies and characteristics they would like to see in their next succession of leaders.

Consistently communicate a transparent model of career development. Communicating defined leadership competencies and providing development in those areas is just as important as identifying the competencies. Managers and other senior personnel should know what you are looking for in a leader.

Engage your professionals in dialogue about advancement. Include professionals from under-represented groups in leadership development and training as a component of succession planning. In recent diversity studies of under-represented minorities, one issue that often factors into diversity candidates' decision to exit is a perceived lack of advancement opportunities. You can counter this trend by establishing leadership training and development initiatives that focus specifically on minority candidates, singling out and cultivating the potential of your most talented employees.

Respect the total contribution. Highlight contributions by diverse employees to the organization. Encourage their involvement on committees or in decision-making groups based on their interests and strengths, not their diversity. In addition, do not assume that a diverse employee speaks for or represents an entire minority group.

Implement mentoring and sponsorship programs. Cross-cultural mentoring and coaching opportunities provide an excellent way to develop and retain strong employees.

- Mentoring programs help create connections and networking opportunities between talented diverse employees and professionals in your organization.
- Sponsorship programs have been shown to be an especially effective mechanism for developing and enhancing diverse professionals' careers. Sponsors serves as allies with the influence to effectuate genuine cultural, environmental and professional change within various business enterprises.

Measure your organization's advancement of diverse talent as compared to non-diverse talent. For example, track the overall effectiveness of your diversity retention based on the representation of previously under-represented groups among your board, officers, partners, managers and directors.



5 STEP

Conduct “stay interviews” as well as exit interviews.

Too many employers wait until a diverse employee has announced his or her pending departure to try to dissect what went wrong. While exit interview data is important to an organization’s ability to document trends related to the work environment, “stay interviews” are a preventive approach that proactively identifies opportunities for improvement before the loss of a valued employee.

6 STEP

Measure ongoing progress.

By tracking your efforts at building workplace inclusion, you’ll know how you are doing. You should make sure to set achievable objectives, measure your progress and communicate results as previously discussed. There are as many relevant trackable metrics of workplace inclusion as there are individual organizations. But some common benchmarks include: employee and client satisfaction; employee retention; productivity; client value; and the ongoing viability of and engagement with your organization’s diversity and inclusion efforts.

[Create Our Action Plan](#)

Stay Interviews Boost Retention and Satisfaction



A great way to discover what is going “right” with your inclusion efforts is to facilitate “stay interviews” with your diverse employees. Stay interviews give them the opportunity to share what’s working for them, as well as their perceptions of what could be done to improve your overall workplace culture. Stay interviews should be separate from standard performance interviews and performed in association with overall human capital and other recruitment and retention initiatives. Consider carefully the timing of these interviews and whom should be included. One recommendation is to conduct stay interviews with all employees after they reach their third-year anniversary.

Examples of questions to ask during a stay interview include:

- What keeps you here and for what reason would you leave our organization?
- If you could change one or two things about our organization, what would they be?



CREATING AN ACTION PLAN

Action	Action Steps	Who's Responsible
Attraction		
Obtain leadership buy-in.	Work to get the Board of directors and CEO to deem diversity and inclusion as an important organizational focus and to communicate the importance of this strategy to all senior leaders and employees.	Senior Leadership, Human Resources, Communications, or Chief Diversity Officer (Diversity Professional).
Recruitment		
Train recruiters on the value of a diverse workforce.	Provide 'Unconscious Bias' training to all recruiters and human resources professionals.	Human Resources, Diversity Professional, D&I Advisory Council
Retention		
Conduct "Stay Interviews"	Establish criteria (i.e. employees with less than 1 year of tenure) and baseline questions for conducting stay interviews. Identify individuals who employees trust and respect to conduct the interviews.	Human Resource

Example



Action	Action Steps	Who's Responsible	Timeline	Comment
Step 1 Obtain leadership buy-in.				
Step 2 Build the business case.				
Step 3 Know where you stand.				
Step 4 Establish clear short-term and long-term goals.				
Step 5 Foster an inclusive environment.				
Step 6 Communicate goals and progress.				
Step 7 Cultivate an inclusive external network.				

Attraction



Action	Action Steps	Who's Responsible	Timeline	Comment
Step 1 Obtain leadership buy-in.				
Step 2 Develop a recruiting plan.				
Step 3 Train recruiters on the value of a diverse workforce.				
Step 4 Perfect your job postings.				
Step 5 Enlist current employees as recruiters.				
Step 6 Practice targeted recruiting.				
Step 7 Create and deliver consistent interview experiences for all candidates.				
Step 8 Invest effective onboarding for your new employees.				

Recruiting

Retention



Action	Action Steps	Who's Responsible	Timeline	Comment
Step 1 Obtain leadership buy-in.				
Step 2 Implement organization-wide diversity and inclusion training.				
Step 3 Foster an inclusive environment.				
Step 4 Invest in employee performance and development.				
Step 5 Conduct "stay interviews" as well as exit interviews.				
Step 6 Measure ongoing progress.				



ADDITIONAL RESOURCES

- Boundless Management. “Steps to Creating a Diverse Workforce.” boundless.com/management/diversity-in-a-global-business-world/creating-a-diverse-workforce/steps-to-creating-a-diverse-workforce/. July 2014.
- Bridgespan Group, [The bridgespan.org](https://www.bridgespan.org).
- DiversityCouncil.org. “Strategies for Retaining Diverse Employees.” diversitycouncil.org/retaining_diverse_staff.shtml. Undated.
- Glanz, B. A. *Handle with Care: Recruiting and Retaining Employees*. New York, NY: McGraw-Hill, 2002.
- Hayes, D. K. & Ninemeirer, J. D. *50 One-Minute Tips on Retaining Employees: Building a Win-Win Environment*. Menlo Park, CA: Crisp Publications, 2001.
- Page, Scott E. *The Difference: How the Power of Diversity Creates Better Groups, Firms, Schools, and Societies*. Princeton University Press, 2008.

List of Diversity-Related Organizations

- American Business Women’s Association — American Business Women’s Association brings together businesswomen of diverse occupations and provides opportunities for them through leadership, education, networking support and national recognition.
- American Indian Science & Engineering Society — AISES substantially increases the representation of American Indian and Alaskan Natives in engineering, science and other related technology fields.
- Asian American Studies Center — The Asian American Studies Center’s mission is to enrich the experience of the community by contributing to an understanding of the long neglected history, rich cultural heritage, and present position of Asian Americans in our society.
- ASPIRA — ASPIRA’s mission is to empower the Puerto Rican and Latino community through advocacy and the education and leadership development of its youth.
- Association of Latino Professionals in Finance & Accounting — ALPFA is dedicated to enhancing opportunities for Latinos in the accounting, finance and related professions.
- Ascend — Ascend is the largest, non-profit Pan-Asian organization for business professionals in North America. Established in 2005, Ascend has grown to serve professionals and corporations across various professions and across multiple industries.
- Black Data Processing Associates — BDPA remains committed to excellence and providing a wide spectrum of resources to members, corporate sponsors, businesses, educational institutions and the community.
- Blacks in Government — BIG has been a national response to the need for African Americans in public service to organize around issues of mutual concern and use their collective strength to confront workplace and community issues.
- Diversity Resources Inc. — Diversity Resources Inc. publishes diversity and multicultural educational and training materials for a wide variety of organizations. Its comprehensive portfolio of products includes an electronic multi-media multicultural calendar, video and print training materials, e-learning, and books on cross-cultural competence in health care. Many of its products can be customized for organizational branding.
- Disabled Veterans National Foundation — The DVNF supplies disabled veterans with the resources they need to be successful and comfortable.
- EASI: Equal Access to Software and Information — EASI is the premier provider of online training on accessible information technology for persons with disabilities.
- Employment Standards Administration Office of Federal Contract Compliance Programs - This office is responsible for ensuring that contractors doing business with the federal government do not discriminate and take affirmative action.
- Equal Employment Opportunity Commission — The EEOC provides information regarding U.S. laws against discrimination in the workplace and the rights of the people the agency seeks to protect.
- Family Equality — The Council seeks to change people’s perceptions of families that may look different. The council believes that all families should be respected and cherished.
- Hispanic Association of Colleges & Universities — HACU represents more than 450 colleges and universities committed to Hispanic higher education success in the U.S., Puerto Rico, Latin America, Spain and Portugal.
- Hispanic Association on Corporate Responsibility — HACR’s mission is to advance the inclusion of Hispanics in corporate America at a level commensurate with our economic contributions.
- Human Rights Campaign — HRC is the largest civil rights organization fighting for equality for the LGBT community.
- Anita Borg Institute for Women and Technology — ABIWT’s mission is to increase the impact of women on all aspects of technology and increase the positive impact of technology on the world’s women.



[AICPA.org/diversity](https://aicpa.org/diversity) | diversity@aicpa.org



- International Association of Employment Web Sites — The International Association of Employment Web Sites is the trade association for the global online employment services industry.
- NOW — NOW's purpose is to take action to bring women into full participation in society — sharing equal rights, responsibilities and opportunities with men, while living free from discrimination.
- NAAAHR — NAAAHR exists to provide a national forum where black and African American human resources practitioners and those who are aligned with their goals can share, gain information and provide leadership on issues affecting their individual careers and the global workforce.
- NAACP — The NAACP's mission is to ensure the political, educational, social and economic equality of rights of all persons and to eliminate racial hatred and racial discrimination.
- National Association of Black Accountants — NABA is a leader in expanding the influence of minority professionals in the fields of accounting and finance.
- National Business & Disability Council — The NBDC is a leading resource for employers seeking to integrate people with disabilities into the workplace and companies seeking to reach them in the consumer marketplace.
- National Association for Black Veterans — NABVETS is a nationally certified Veterans Service Organization that offers support and resources to black veterans.
- National Council of Philippine American Canadian Accountants — NCPACA is non-profit professional organization represented by accounting professional organizations from various major cities of USA and Canada whose memberships are mostly Filipino, American and Canadian accountants.
- National Veteran-Owned Business Association — NaVOBA creates opportunities for veteran-owned businesses so that they will be successful.
- National Association of Service Disabled Veteran Owned Business — NASDVOB provides resources for disabled veterans so that they will be able to successfully run their own small businesses.
- National Society of Hispanic MBAs — The NSHMBA exists to foster Hispanic leadership through graduate management education and professional development.
- National Society for Hispanic Professionals — NSHP's mission is to empower Hispanic professionals with information and connections.
- Office of Federal Contract Compliance Programs — OFCCP administers and enforces three legal authorities that require equal employment opportunity.
- Out & Equal — This organization strives to achieve workplace equality for the LBGT community.
- Out Serve — This organization is a network of LBGT active military personnel. It is one of the largest LBGT employee resources groups in the world.
- ProGayJobs.com — This organization is dedicated exclusively to the employment needs of the LBGT professional workforce.
- Rainbow PUSH Coalition — The Coalition defends and fights for civil rights in order to foster peace and justice in the world.
- Resumes2work.com — This organization is a recruiting firm focused on information technology job placement.
- Rivers of Recovery — Rivers of Recovery is a non-profit organization that uses outdoor recreational rehabilitation programs to help treat veterans suffering from PTSD.
- SolidHires — This organization provides a different type of job fair that focuses on creating mutually beneficial relationships for job seekers and companies. Also, the organization strives to help veterans find jobs and improve their employment skills.
- The Diversity Initiative — DI enhances the knowledge, power and effectiveness of nonprofit organizations, particularly those that engage people in community and public life.
- Transformative Job & Career Services CAREER-Magic.com — Career-Magic.com provides transformative job and career strategies, changing the lives of thousands of motivated professionals of all backgrounds and cultures.
- Veteran and Military Business Owners Association — VAMBOA attempts to develop, grow and promote all veteran-owned businesses.
- Veterans of Valor — Veterans of Valor provides support and assistance for severely wounded service members.
- Women in Technology International — WITI's mission is to empower women worldwide to achieve unimagined possibilities and transformations through technology, leadership and economic prosperity.