

NCACPA Diversity & Inclusion Definition Task Force

Recommendation for Association
Diversity & Inclusion Definition

Task Force Charge

- Conduct research on diversity & inclusion definitions
- Develop recommended diversity & inclusion definition for consideration by the Board

Task Force Members

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Task Force Activities

- Researched diversity & inclusion definitions
- Researched other organizations' diversity & inclusion definitions
- Reviewed previous D&I task force report
- Conference call for organizational matters and initial discussion
- Each task force member proposed diversity & inclusion definition
- 2nd conference call to discuss member-proposed diversity & inclusion definitions
- In-person meeting to review task force members' proposals and develop recommendations

Agreed Upon Observations About D&I

1. Need for shared language
2. The effort needs to be intentional
3. Need to strive to have it become part of the conversation
4. Ability to paint the picture
5. Establish strong tone at the top by senior leadership/Board
6. Developing clear metrics will help measure progress

D&I Defined

Generally, no definition about what a diversity & inclusion definition should contain

Looked at examples for guidance

Leveraged discussion from Board meeting

Example D&I Definitions

Bank of America

We are a diverse and inclusive company

Our diversity makes us stronger and is essential to our ability to serve our clients, fulfill our purpose and drive responsible growth. We recognize the potential of every employee by actively encouraging a diverse and inclusive workplace — in thought, style, sexual orientation, gender identity, race, ethnicity, disability, culture, and experience.

Example D&I Definitions

Stanford University

At Stanford, we strive to ensure that a diversity of cultures, races and ethnicities, genders, political and religious beliefs, physical and learning differences, sexual orientations and identities is thriving on our campus. Such diversity will inspire new angles of inquiry, new modes of analysis, new discoveries and new solutions.

To advance education, it is essential to be exposed to views and cultures other than one's own and to have one's opinions and assumptions challenged. Such engagement expands our horizons, enables understanding across differences, prevents complacency and promotes intellectual breadth.

Example D&I Definitions

Walk West

Diversity and inclusion are integral to how we do business. We are inspired by the unique people that comprise our team and value their varied experiences, thinking styles and perspectives. At Walk West, we know that by prioritizing and embracing a diverse workforce, and by valuing their contributions from our leaders to our interns, we foster a culture of creativity, innovation and collaboration.

Example D&I Definitions

Massachusetts Society of CPAs

The MSCPA is committed to diversifying the accounting profession, because we understand that a workforce that's reflective of the communities it serves is strongly positioned to succeed in an evolving, global marketplace.

The mission of the MSCPA is to grow diversity in the profession, from helping students move through the pipeline, to increasing retention and advancement at firms and companies. We will do this by:

- Raising awareness of the accounting profession and providing programs and financial assistance to students from underrepresented populations;
- Educating members about the business case for diversity in the accounting profession and recognizing exceptional CPAs and firms excelling in this area; and
- Working with firms to increase programs designed to retain and advance diverse talent, with the help of CEO Action for Diversity & Inclusion.

Diversity & Inclusion Definition Recommendation

The Association is committed to promoting diversity, equity and inclusion in its membership, leadership, staff, and business relationships.

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By prioritizing and embracing diversity, equity and inclusion, we are a richer and more effective Association.

Diversity & Inclusion

Definition Recommendation

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By prioritizing and embracing diversity, equity and inclusion, we are a richer and more effective Association. By valuing and respecting individual perspectives, we increase our strengths, capabilities and adaptability, and enhance a highly valued and sustainable accounting profession.

Summary

We Welcome All in the NCACPA

The Association is committed to promoting diversity, equity and inclusion in its membership, leadership, staff, and business relationships. We believe every individual who impacts our organization brings a unique perspective and experience shaped by their age, color, disability, ethnic and national origin, gender, race, religion, sexual orientation, socio-economic background, and career experience.

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D&I Definition Elements

- Diversity, Equity & Inclusion
- Where
- Who
- Why
- How
- Outcome/result
- Linkage to Vision & Mission statements

Summary

We Welcome All in the NCACPA

Where

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Who

Why

By prioritizing and embracing diversity, equity and inclusion, we are a richer and more effective Association. By valuing and respecting individual perspectives, we increase our strengths, capabilities and adaptability, and enhance a highly valued and sustainable accounting profession.

How &
Outcome

Implementation Recommendations

Communication	Workforce	Board & Comm.	Culture	Member Firms
Use collective pronouns	D&I goals part of performance appraisals	Create culture, D&I Committee	Tone at top	Survey and create groups to identify unmet needs
Create internal D&I vocabulary	D&I part of employee onboarding process	Create toolkit of "how to's"	Hold each other accountable (publish scorecard)	
Create D&I communication strategy	Ongoing training	D&I at Leadership Summit	If you see or hear something, say something	
D&I represented at every conference		Leadership self-assessment of blind spots		
		Create succession plan to engage members of Young CPA Cabinet		



Recommendation/ Next Steps

- Review Diversity & Inclusion definition at January Board meeting
- Approval of Diversity & Inclusion definition at January Board meeting
- Write article for *Interim Report* to communicate adoption of Diversity & Inclusion definition and why
- Move forward with Implementation Recommendations

Discussion and Questions