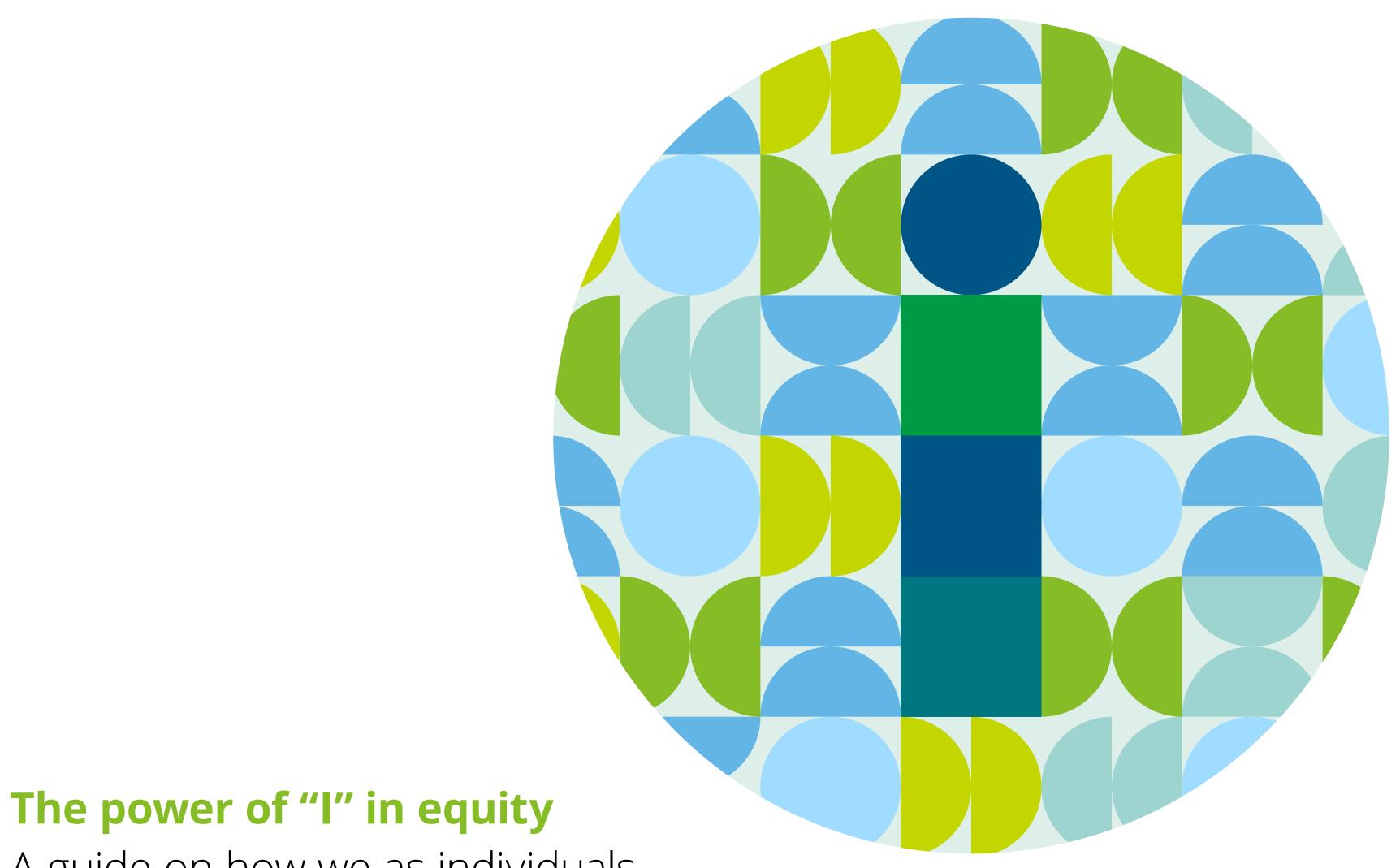
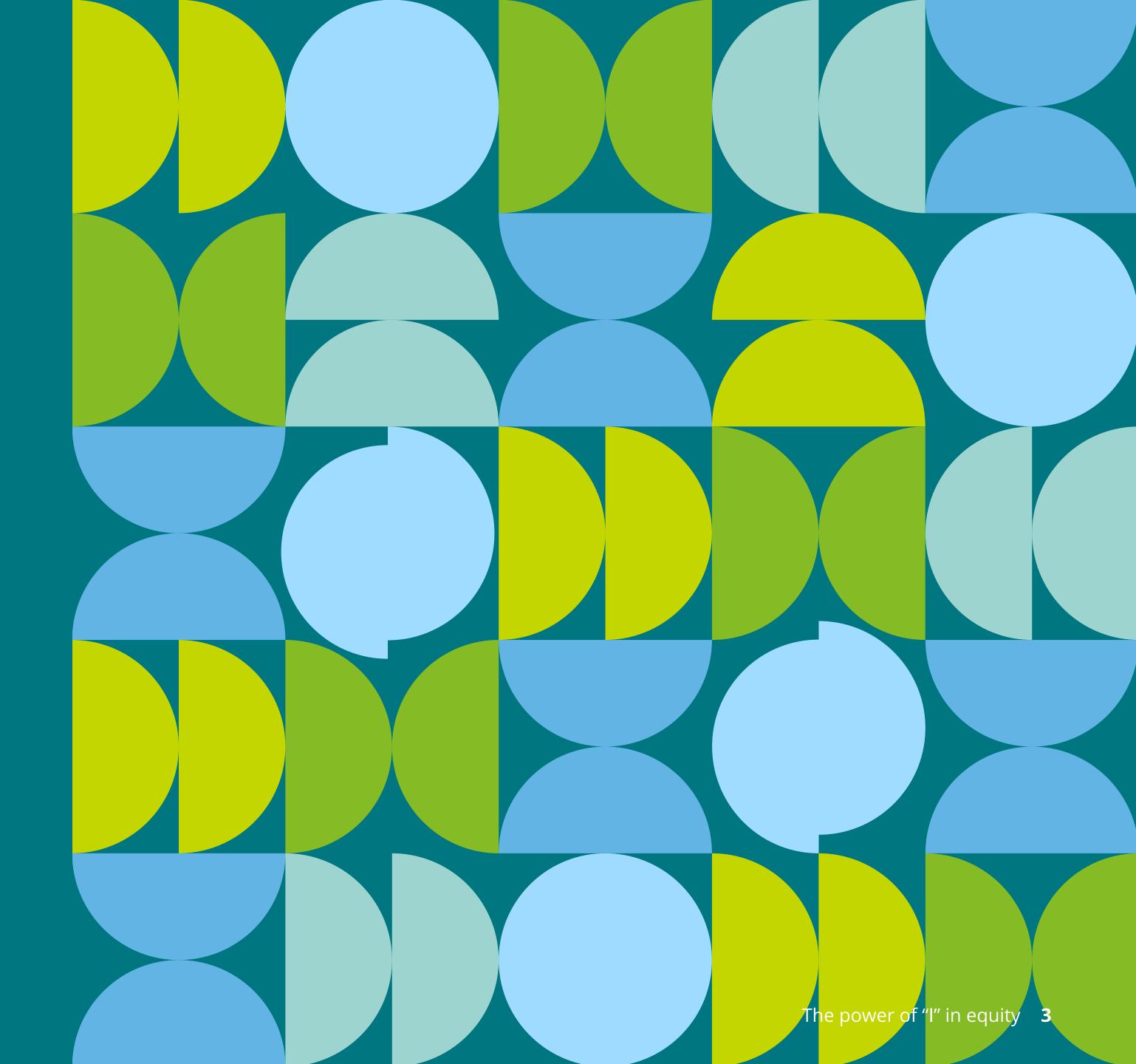
#### Deloitte.



A guide on how we as individuals can practice advancing equity

#### **Contents**

The power of "I"	3
Practices to advance equity	7
OBSERVE: Take notice – Identify patterns in outcomes	10
ACKNOWLEDGE: Make it plain to yourself – Reflect on your own journey	12
QUESTION: Find your why – Follow your curiosity	14
CHALLENGE: Shift your perspectives – Reassess your beliefs	16
ACCEPT: Own your role – Embrace your responsibility	18
ACT: Take small steps to bold actions – Build sustainable momentum	20
CONNECT: Champion together – Commit to collective success	22
Getting started	25
Appendix	27
Start with a personal assessment	28
Additional information	30
Survey methodology	30
Authors & contributors	31
List of figures/Endnotes	32
Contact us	33
About this publication	33

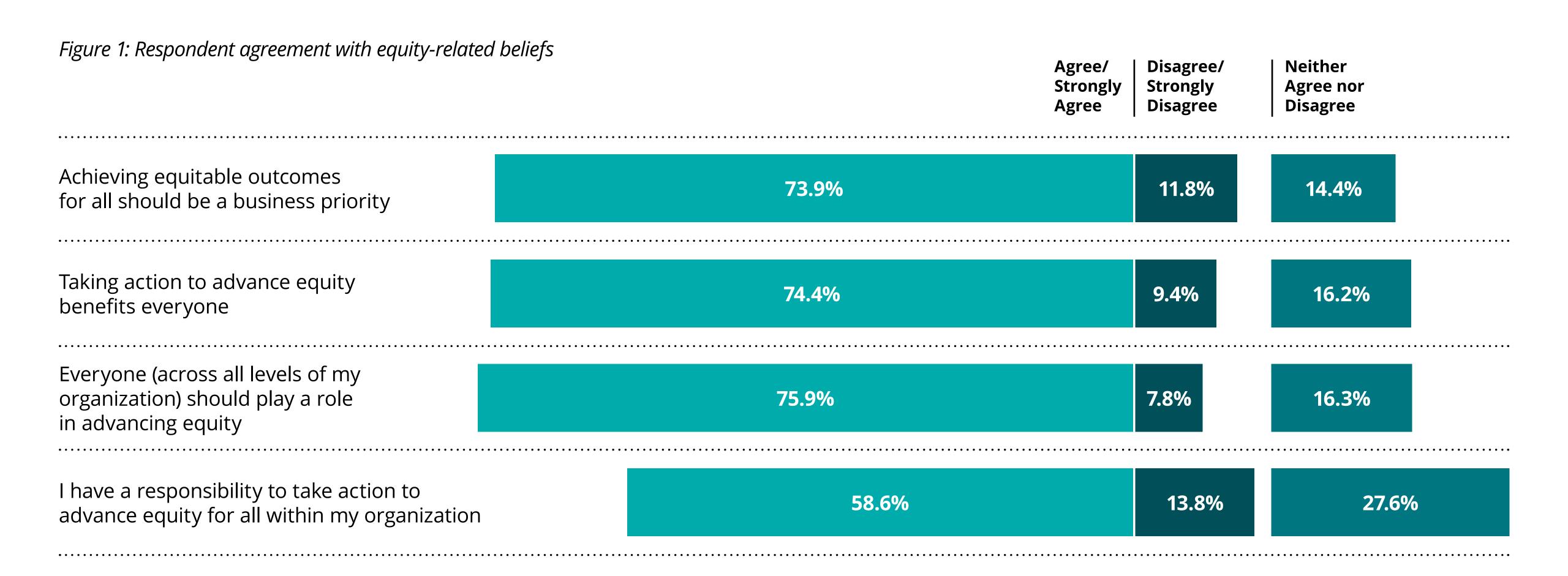


Who is responsible for prioritizing equity? Organizations that prioritize equity can often attract and retain more top talent; build stronger teams; and foster collaborative, innovative, and productive team cultures.<sup>1</sup> But, prioritizing equity requires understanding the roles all individuals (the "I")—from senior executives to frontline workers—can play. This report explores how each of us, as individuals, can identify and recognize the importance of our role, responsibility, and power to advance equity.

Deloitte defines equity as the outcome of diversity, inclusion, and anti-bias actions wherein all people have fair access, opportunity, resources, and power to thrive, with consideration for, and/or elimination of, historical and systemic barriers that have existed in society.

Deloitte's DEI Institute™ surveyed fulland part-time adult (18+) US workers from companies with a minimum of 500 employees, across five industry categories.

- More than 73% of respondents agree or strongly agree on the business priority, the benefit, and that "everyone" should play a role in advancing equity.
- Yet only 59% agree or strongly agree that they have a personal responsibility to advance equity for all (Figure 1).
- Additionally, while most respondents (83%) believe that leadership support to advance equity is critical, only 61% actually feel supported to take action.



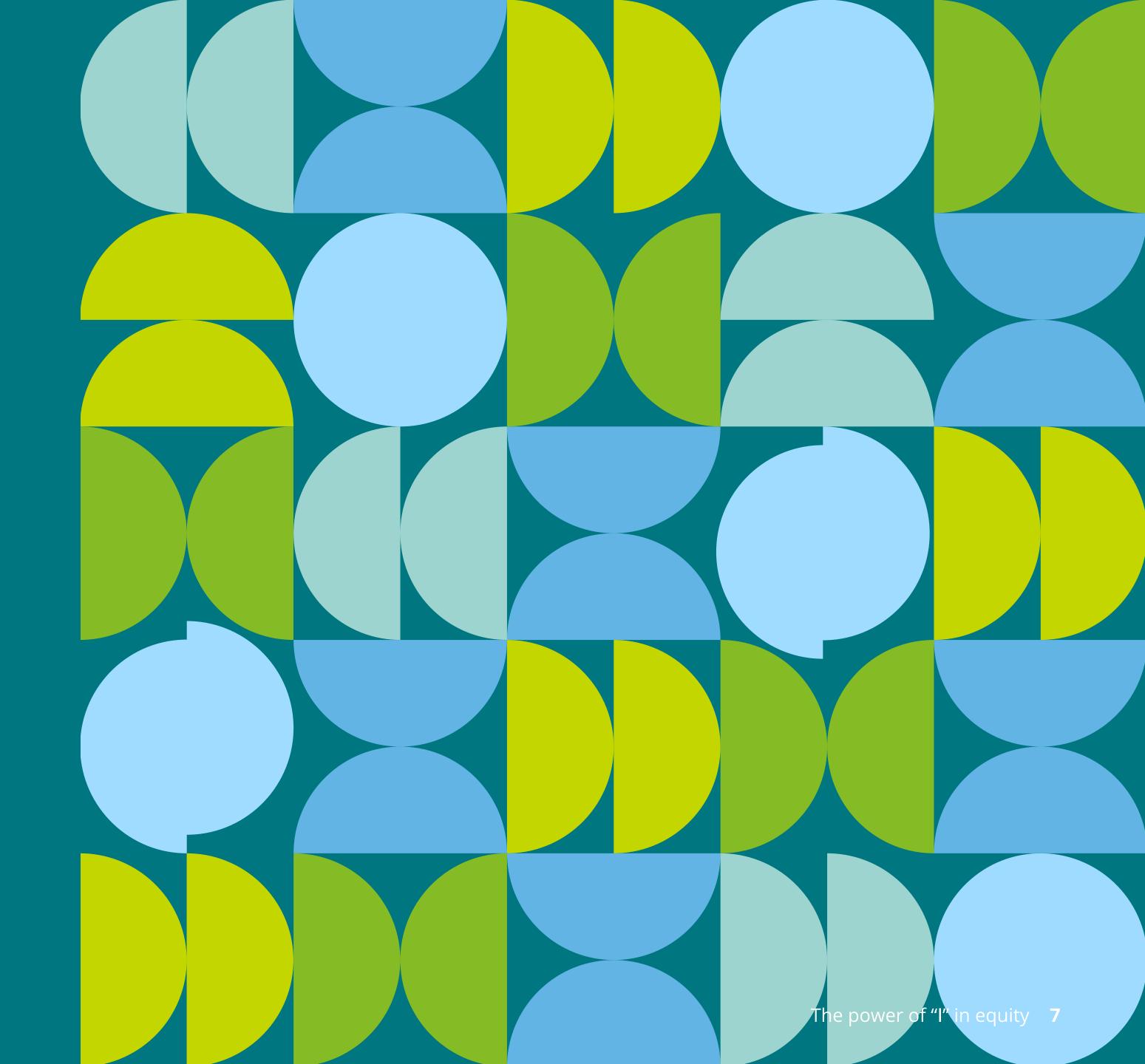
Qualitative responses also revealed that workers feel that they lack the power to drive equity:

- I work for a very large company as an individual contributor. My actions alone do not have the power to effect equity in my organization.
- [There is] little opportunity for a mid-manager to impact equity.
- I do not seek out equity at work because we don't choose our groups and [colleagues] we work with week to week. have zero decision making [power].

Deloitte's DEI Institute<sup>TM</sup> proposes that everyone, across all levels of an organization, can play a role in advancing equity. After all, the workforce, marketplace, and society are made up of all of us individuals who can, and do, influence each other.

Whether through lending access and influence on existing efforts, or actively supporting new initiatives, every individual can make a difference. Understanding one's role means acting within an individual's capacity and joining others to drive equitable outcomes.

# Practices to advance equity



#### Practices to advance equity

We have identified seven practices to develop a holistic approach to awareness and action, across all encounters, whether professional or personal (Figure 2). They serve as a helpful guide to use and revisit when seeking to understand how to engage in daily circumstances or contexts.

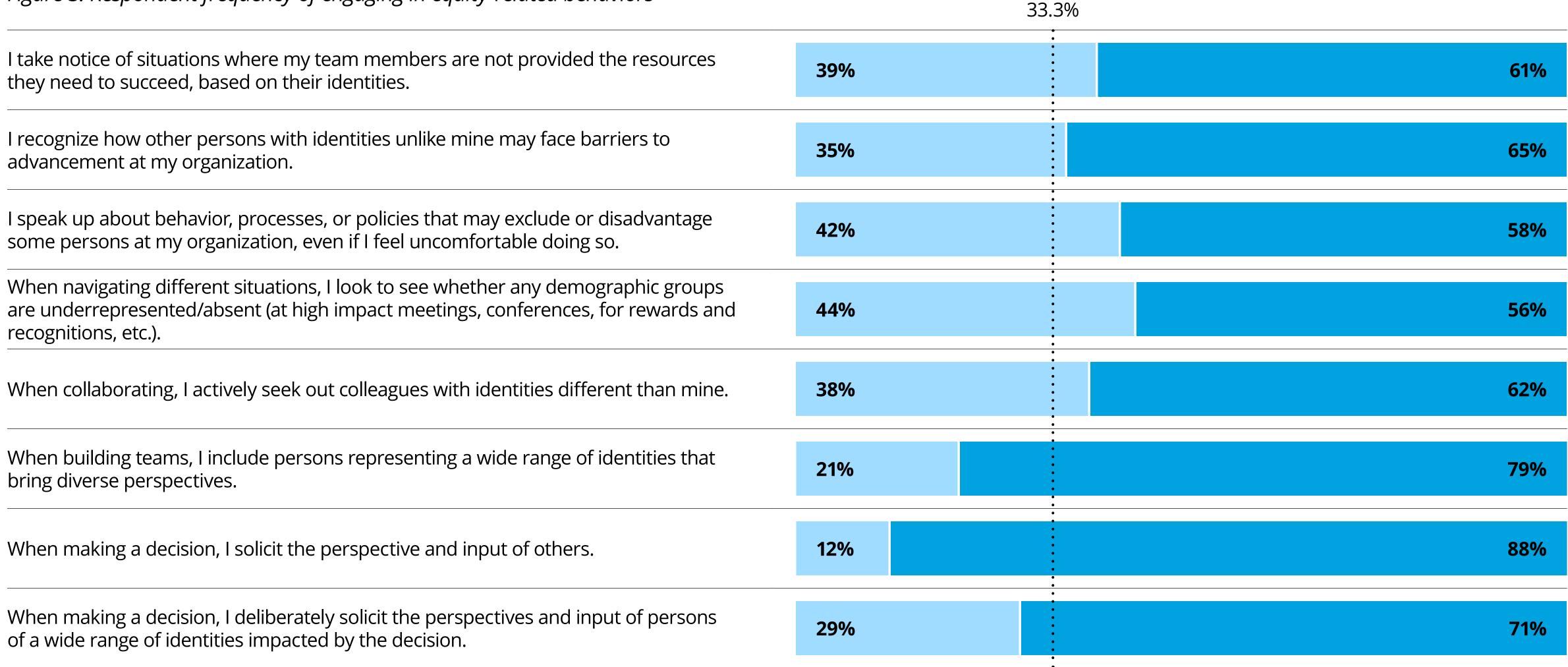
Our survey revealed that more than a third of respondents never or rarely engage in five equityrelated behaviors (Figure 3). Therefore, we offer suggestions on how to engage in practices to advance equity and have provided self-reflective questions to prompt ongoing curiosity and growth. Continuous self-reflection can be challenging, so frequently revisiting these ideas may be helpful. The goal is to make a practice of this work, leading to an overall mindset shift that will guide the habits individuals develop, the choices they make, and the impact they have on those around them.

Figure 2: Seven practices to advance equity



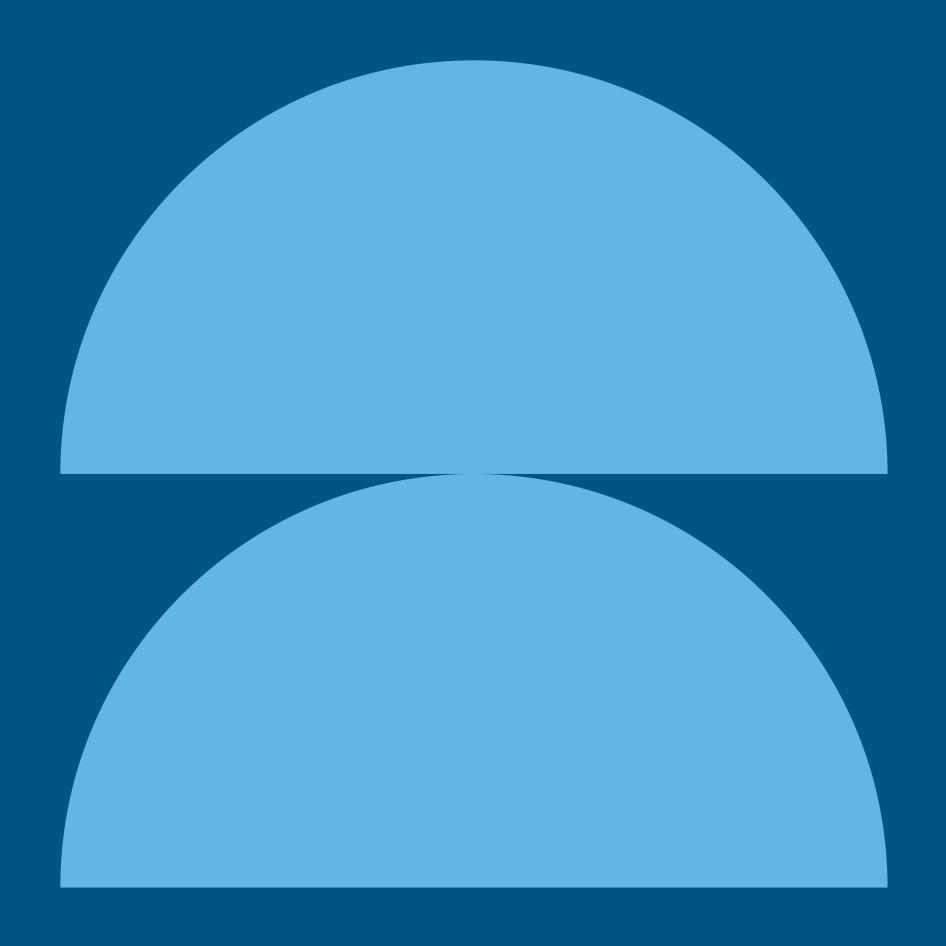
#### Practices to advance equity

Figure 3: Respondent frequency of engaging in equity-related behaviors



Never/Rarely Often/Always

#### **OBSERVE: Take notice – Identify patterns in outcomes**



#### How can "I" Observe?

Take time to notice how things work for individuals with different identities, experiences, and perspectives. Through this new lens, strengthen this awareness by listening to others with experiences different from your own, demonstrating empathy, and asking questions to build an understanding of all the seemingly innocuous things that can contribute to equity in the workplace. Understand that your own experiences may not be typical and that those of others are worth exploring to understand how things *really* work—especially where the connection between everyday individual behaviors and systemic outcomes may not be clearly apparent to you. Notice whether systems and social structures may assign disadvantage to individuals with some identities and not others. If the practices, policies, protocols, and processes seem fine, yet do not result in fair outcomes for everyone, ask yourself why.

#### Why should "I" Observe?

You cannot solve a problem you do not notice.

By failing to take notice, you may not realize how current systems may produce different outcomes for individuals with different identities, how you might unconsciously enable unjust outcomes, and how this impacts the experiences of others—experiences that might differ greatly from your own. This is how the status quo is often maintained, ultimately perpetuating cycles of inequity.

#### **OBSERVE**

#### What happens when "I" Observe?

By noticing who is disadvantaged by the status quo, you can be in a better position to identify opportunities, to disrupt the patterns of inequitable outcomes, and to understand the necessities of communities in need of support, allyship, or advocacy.

#### Ask yourself:

What is happening around me that does not seem quite right?

Observe whether processes, practices, policies, and operating protocols might be contributing to "how things are."

What perspective or input might I be missing, when considering everyday work decisions and the impact of those decisions on others? How are different perspectives incorporated into the decision-making process? What impact might those perspectives have on the decision or outcome? Does the decision lead to the same outcomes for everyone? How? Why?

Deloitte's DEI Institute™

The power of "I" in equity 11

#### **ACKNOWLEDGE:** Make it plain to yourself – Reflect on your own journey



#### How can "I" Acknowledge?

As you are noticing what is happening around you, be vulnerable and honest with yourself about all the support and resources that were, or were not, available to you. We\* understand that hard work and fortuitous connections influence results. But we should also consider how differing circumstances can lead to very different outcomes, and how systemic advantages or disadvantages may prescribe outcomes for individuals. Practice by continuously seeking to understand, learn, and make connections to the potential root causes.

Your own history often sets the context for how you got to where you are, how your experiences influence your perspective, and how that context and experience inform what you believe is possible. Embark on a genuine exploration of your influence to make change. Keep an open mind and be flexible as you clarify for yourself what you are willing to watch happen, and what you are willing to challenge.

#### Why should "I" Acknowledge?

If the rules and practices at work or in your community have a disproportionate impact on some individuals and result in different outcomes, they may be inherently inequitable. Learning why these rules were established, by whom, and why they still stand is critical to understanding whether and why inequity may exist and persist. It is important to understand the connections of how history has contributed to where we are today. This journey of self-reflection is intended to address inequities that may be so ingrained that they are almost invisible, and to help you find ways to challenge and/or overturn them.

\*Moving forward, unless otherwise explicitly mentioned, 'we' refers to all individuals in the broader society, holistically.

#### **ACKNOWLEDGE**

#### What happens when "I" Acknowledge?

This self-reflection can help you understand how and why particular outcomes may differ from others. Keep an open mind as you identify potential inequities at work or in society—and consider whether you may be open to challenging them. Although reflection can be uncomfortable, use this awareness-building process to take more thoughtful actions toward advancing equity.

#### Ask yourself:

#### How have I benefited from the status quo? How have I been disadvantaged?

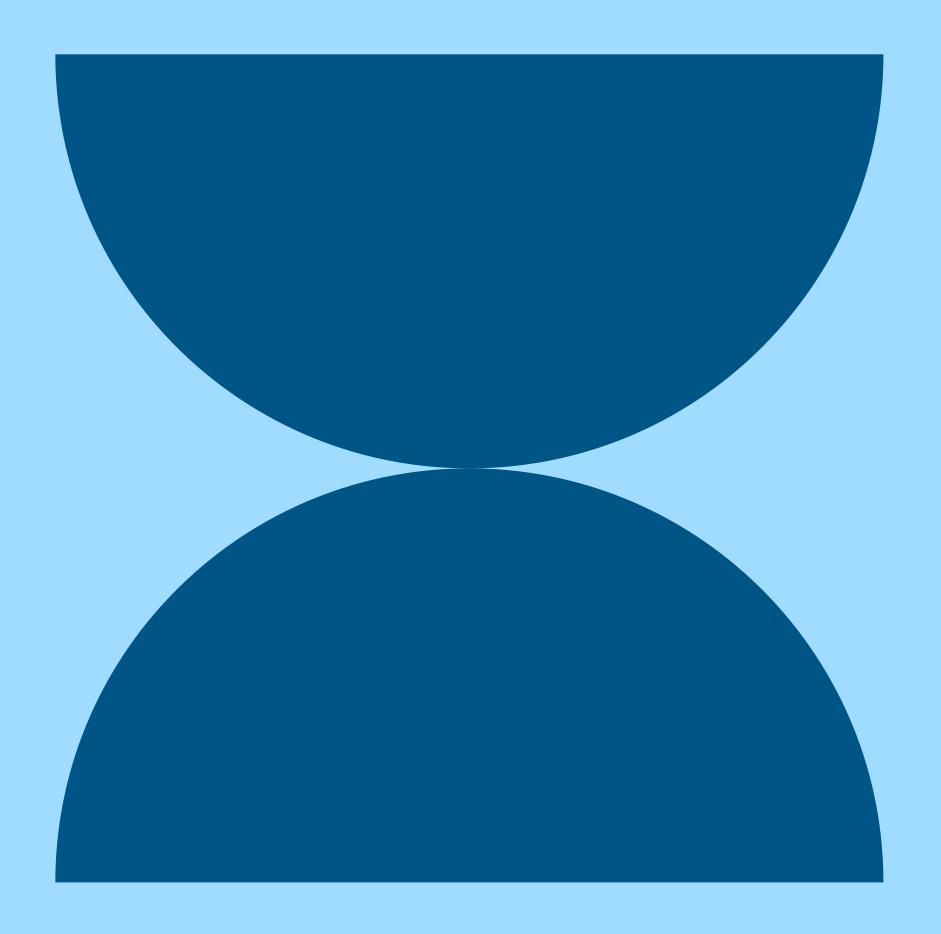
If accepted practices at your company put you or some colleagues at an advantage or disadvantage, think about the personal growth or external support you would need to challenge those practices. What would happen if you stepped outside of your comfort zone?

#### When I consider how I influence and affect others and the ways we are all impacted by history, how do I see my own connection to potential inequity?

Acknowledge if your actions (or lack of action) intentionally or unintentionally contribute to the inequity. This can help you understand the root causes of inequitable outcomes.

Deloitte's DEI Institute™

#### **QUESTION:** Find your why – Follow your curiosity



#### How can "I" Question?

Stay curious. Make a deeper and personal connection with why challenging the status quo at this moment is important to you. Begin by understanding that equitable outcomes for yourself are often connected to equitable outcomes for others.

Humility and honesty with yourself about what you do and do not know can help you identify where you may have more to learn, and seek new and different experiences to expand your understanding.

#### Why should "I" Question?

Even when you have reflected on how individuals may contribute to inequitable systems, you may lack the personal connection and motivation to act in a meaningful way. As a result, you may not see a meaningful impact from your actions, which may cause you to stall or give up. Others may read your actions as forced or inauthentic. Not feeling truly motivated to understand the inequities within your work communities can also stifle progress.

#### QUESTION

#### What happens when "I" Question?

This level-setting can help you discover where you can begin to be more curious. Through that, you may attain a clearer sense of your responsibilities and your power to effect change.

#### Ask yourself:

How do I feel when I allow myself to reimagine what is possible? Honest self-reflection and openness to what could happen often make you feel more connected to those around you, increasing your motivation to pursue equity.

#### How may following my curiosity connect to my sense of purpose and responsibility?

Once you attain clarity on your ability to effect change and your responsibility to do so, it can prepare you to take actions, large and small.

#### **CHALLENGE:** Shift your perspectives – Reassess your beliefs



#### How can "I" Challenge?

It can often be difficult to change our minds, especially when we have been taught to view the world in particular ways. Our beliefs shape our experiences and behavior.

Practice by proactively challenging beliefs—your own, and those that underpin the values and behaviors that support the status quo.

This is often uncomfortable and our inner critic naturally resists. If you are willing to sit in your discomfort long enough to challenge your beliefs, you may find other underlying values at odds with your goals and intentions. You will be preparing to change behaviors and move beyond dealing with surface issues to examine and address root causes.

#### Why should "I" Challenge?

Core beliefs shape assumptions about the world around you, yet they may have been a part of you for so long that you never really examined or questioned them. Take time to challenge long-held beliefs, recognizing that they may be based on your personal experiences, perspectives, education, and community.

These beliefs are powerful, but you will feel more power when you challenge those beliefs with facts. You may want to start by learning from and with others that will prompt you to self-reflect. Selfreflection provides an opportunity to identify and examine your tenets and analyze whether your beliefs limit your perspectives and/or disadvantage those around you.

#### CHALLENGE

#### What happens when "I" Challenge?

With continuous reflection stimulated by experiences, learnings, cultures, and beliefs that are different from your own, a new perspective may emerge that makes space for change.

Further, challenging yourself—your core beliefs and assumptions by committing to learning—may help you become more receptive to other people and viewpoints. These new voices and knowledge resources can help you grow, be more willing to act, and find ways to reframe the existing condition when it fails to serve the goals of equity.

#### Ask yourself:

#### What can I learn about people with experiences different from mine, and how can I use these diverse perspectives to inform or evolve my beliefs?

Be open when others voice their concerns or share their experiences. Avoid minimizing these or explaining them away. It offers an opportunity to learn to consider alternate points of view.

#### What underlying beliefs inform my values and behaviors?

Exploring beliefs and assumptions you may have never questioned is an important step in recognizing the root causes of inequity.

#### Am I comfortable receiving honest feedback? What do I do with the feedback I receive?

Often, you may resist feedback that asks you to acknowledge where you have fallen short and where you can improve.

#### **ACCEPT:** Own your role – Embrace your responsibility



#### How can "I" Accept?

Identifying your responsibility in the pursuit of equity means taking ownership and accountability for what is within your spheres of influence. Be intentional in the actions you take and clarify how those actions can address root causes that result in equitable outcomes. This can be a long and sometimes arduous process. Remain committed to what you can do in the short term, while aiming for long-term impact. Owning your role means understanding and accepting your personal responsibility, capacity, and power to make change.

#### Why should "I" Accept?

If you were assigned an important business task, you would give it careful consideration, making sure you understood all aspects so you could take full ownership. Similarly, you should prepare to understand your own role in advancing equity through your formal and informal roles. Doing so requires you to take thoughtful action aligned with shared goals.

#### **ACCEPT**

#### What happens when "I" Accept?

Embracing a well-defined role strengthens all these *practices to advance equity* and can help you respond in a meaningful way. Give yourself the space and time to get there. When you understand your own role, you may be better prepared to find opportunities to fill gaps and connect with others to help hold yourself accountable.

#### Ask yourself:

How can I make equity a goal in my decisions and interactions? Examine the outcomes of recent decisions and understand how the impact may differ across cohorts or stakeholders. Learn more about what specific considerations would have led to more equitable outcomes within and across those groups.

How do I respond when actions do not have the intended impact? It is human nature to take credit for successes and to attribute unintended outcomes to someone or something else. Reflect on what went wrong or was missing in the approach or execution. Examine how effective change is implemented in your organization and how to apply lessons learned at the next opportunity.

Deloitte's DEl Institute™

#### ACT: Take small steps to bold actions - Build sustainable momentum



#### How can "I" Act?

To make meaningful change, start with what and whom you know. As you push yourself from your comfort zone to your challenge zone, explore the difference between actions that are comfortable and those that have real impact.

Being bold may mean facing challenges. What's more, those bold actions will build momentum and have the power to transform. As you allow different perspectives and experiences to inform your actions, be intentional in how you address the root causes of inequity.

Focus on the long-term impact and remind yourself that today's action can be one of many building blocks for realizing transformational and sustainable change.

#### Why should "I" Act?

The goal here simply is to start. Try not to get overwhelmed by the assumption that steps toward equity must be big and complex. Even a small step can be powerful, if enacted with the right level of awareness.

#### **ACT**

#### What happens when "I" Act?

Our research shows that when individuals decide to act with the intention of addressing equity, they are more likely to be successful.<sup>2</sup> However small, the meaningful actions you take can lead to powerful endeavors. Even at the early stages, intentional actions can create impact and begin to build momentum toward further change.

#### Ask yourself:

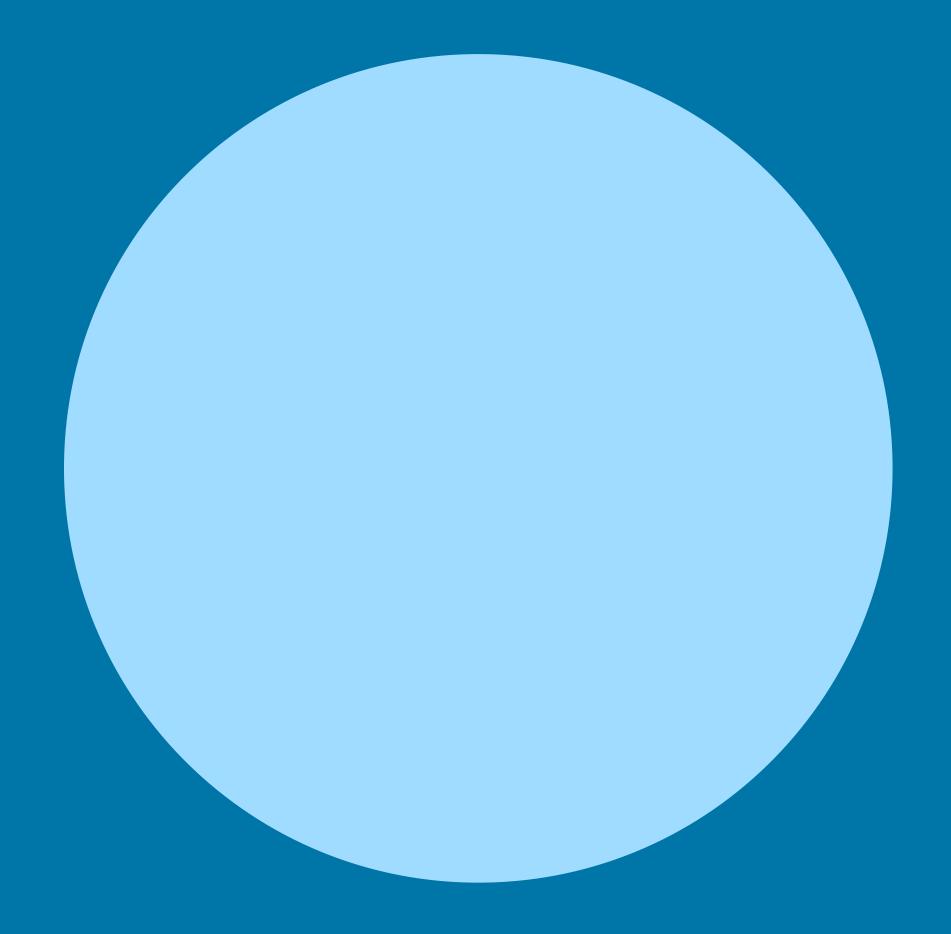
#### How do I call others in when I witness inequitable or noninclusive behavior?

Responding to exclusionary behavior can be difficult, even intimidating. Start by asking yourself whose comfort you are most concerned about in these instances—your own, those engaged in the inequitable behavior, or those impacted by it—and consider the consequences of inaction.

#### How do I take (and facilitate) actions that address root causes to help drive more equitable outcomes?

Thinking of the activities that resulted in the status quo is important when planning to act. Examine how the solution can be applied to the root cause and be careful not to urgently look past an immediate imbalance. What might be the benefits of addressing the root causes? What might be the flaws and consequences of not doing so?

#### **CONNECT: Champion together - Commit to collective success**



#### **How can "I" Connect?**

There are likely other individuals who have similar ideas. Recognize and engage with those who have been involved in and committed to change. Connect and join with people of different identities, perspectives, strengths, and talents to envision, strategize, and execute bold actions. To address seemingly unsolvable problems may require creativity and innovation, where diversity is only the first step to making the most tangible and impactful difference.

Consider how you can amplify the efforts of others and how your ideas are amplified through different influential channels. Consider where you can listen and leverage your social capital. Make connections between these efforts and learn how active allyship can support mutually reinforcing efforts and goals.

#### Why should "I" Connect?

It may be daunting to set out to make a difference on your own. There may be resistance and ingrained barriers when attempting to disrupt the status quo. Working with others provides an opportunity to leverage varied experiences and can help attain a deeper understanding of systemic issues and how to potentially address them.

#### CONNECT

#### What happens when "I" Connect?

Connecting in these ways can make you more aware of the power of collective action. As you engage with others in your efforts, others will, in turn, seek to enlist you in theirs. Think about ways to support the efforts and success of colleagues as you would your own. As you connect with others to multiply impact, you may be surprised at how easy it is to find allies. Finding allies will help you move from passive behavior to proactive cooperation and advocacy.

#### Ask yourself:

#### How can I support collective success?

This is where it is important to remember the goal—to address inequity, not to promote a self-serving personal agenda.

Am I comfortable sharing my power and decision-making with others? And if not, why not? How might I maximize my impact by working in collaboration with others?

Remember that we can learn from individuals who are already on this journey. Always consider the impact that we might be able to collectively achieve, that you may not be able to have alone.

Deloitte's DEI Institute™

The power of "I" in equity 23

#### Outcomes of engaging in the practices

More than one-third of respondents indicated they never or rarely recognize inequitable patterns, barriers, and challenges that others face, and do not speak up against inequities (Figure 3 on page 9). Active allyship is most effective when we observe patterns and acknowledge inequities, anticipating situations and focusing on pragmatic and effective actions to advance equity.

Two primary positive outcomes may occur when individuals act with thoughtfulness and introspection:

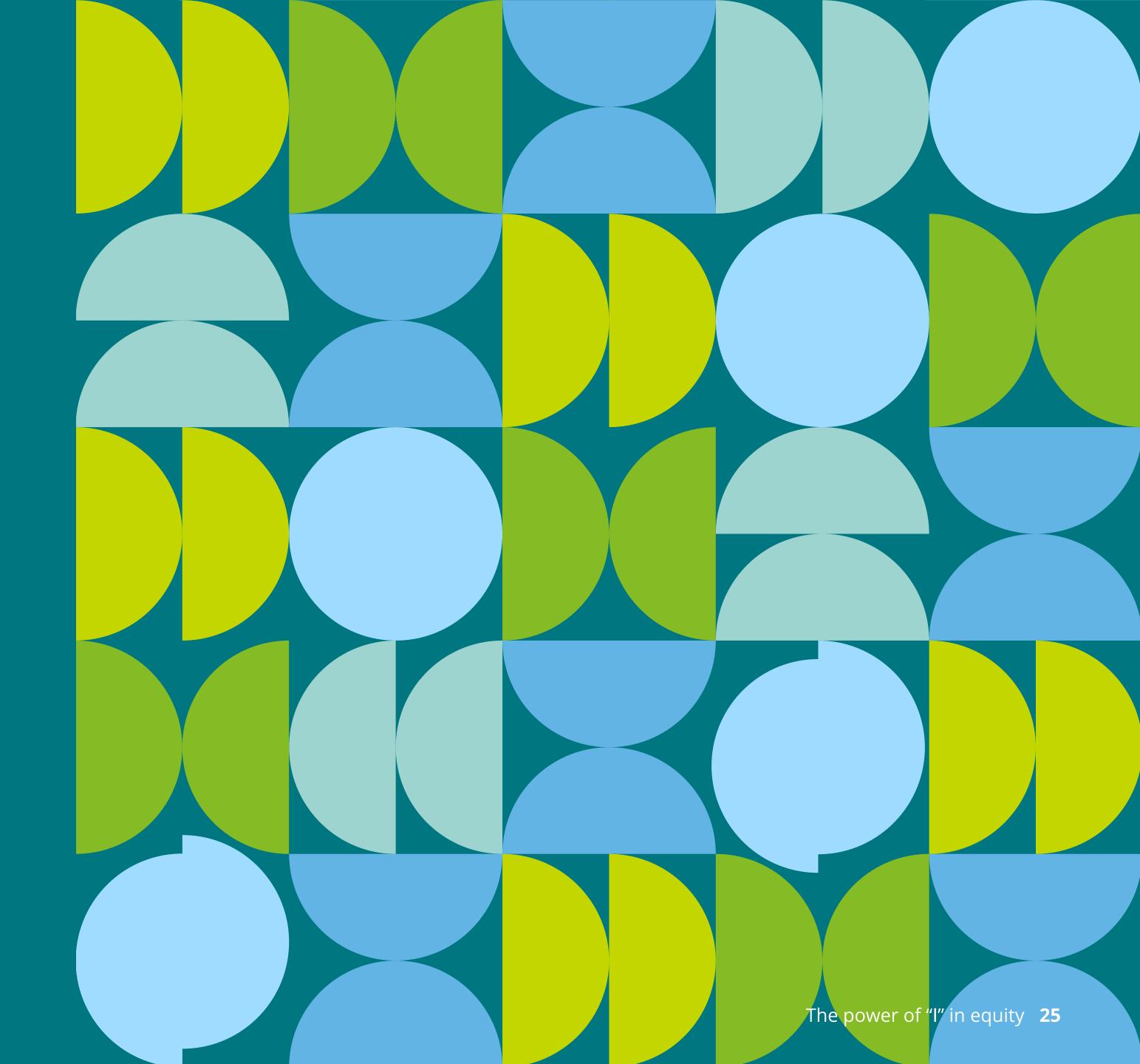
Emphasis on intentionality over urgency

When prioritizing intentionality over urgency, individuals enable more time to better understand and assess the impacts of their efforts. Taking this time to pause, reflect, and dive deeply into each of the seven practices may allow for more meaningful progress.

Continuous momentum

The likelihood of equity efforts stalling may decrease, and day-to-day experiences of workers and organizational cultures may start to shift as leaders push for long-term solutions.

### Getting Started



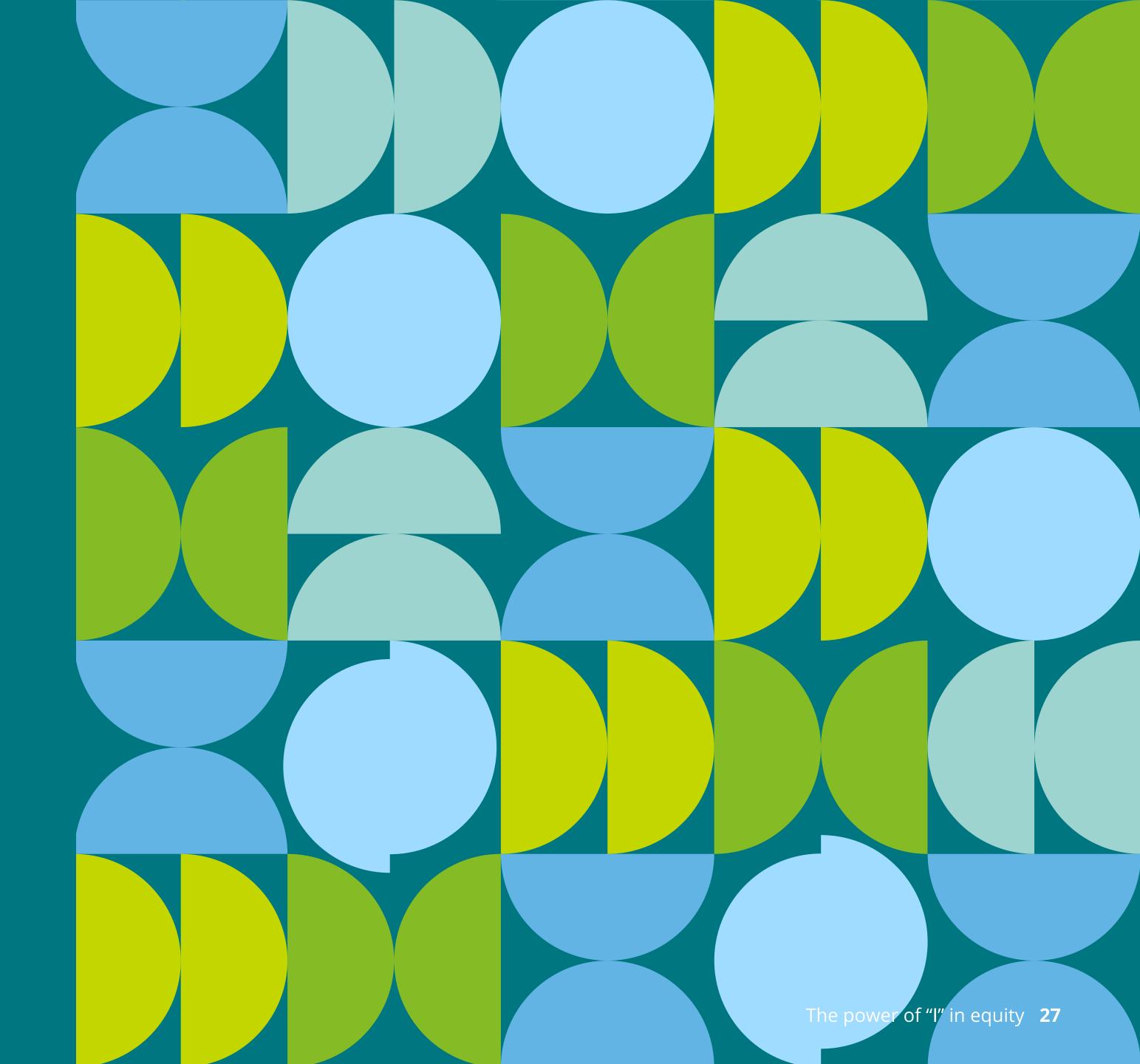
#### **Getting started**

Practice daily. Assess your equity-related behaviors (see appendix for details). Reflect on how the practices can be applied in interactions and decision making. Keep an open mind about your personal growth. With continuous and intentional engagement, these practices may become embedded in your daily work and influence your recommendations and decisions. Your actions may also influence your colleagues to do the same.

Meaningful progress takes bold actions to address systemic issues and root causes. It requires individuals willing to examine their own assumptions, understand how systems reinforce the status quo, align their purpose and commitment with what is required, and have the courage to address systemic inequities—built into processes, policies, and everyday decisions. It requires harnessing the power of the individual to move from asking "Who is responsible for prioritizing equity?" to "How can I contribute to advancing equity?"

When we take bold action collectively, we can build an equitable future.

## Appendix



#### Start with a personal assessment

Consider using the assessment tool (on p.29) to develop a better understanding of your baseline engagement in equity-related behaviors. In committing to the *seven practices to advance equity*, you may decide to retake this assessment, periodically, to acknowledge your progress and identify areas where you can continue to improve.

Deloitte's DEI Institute™

#### Start with a personal assessment<sup>3</sup>



Seven practices to advance equity	Equity-related behavior	Never	Rarely	Often	Always
OBSERVE	I proactively seek to understand if my colleagues within my organization feel included				
	I proactively seek to understand if my colleagues feel like they have equitable opportunities and outcomes				
ACKNOWLEDGE	I proactively remind myself of any unearned benefit and power that others and myself may have due to an aspect of identity				
	I remain conscious of systems in place that could cause some groups to be at a disadvantage				
QUESTION	I proactively seek to understand the experiences among marginalized identity groups				
	I proactively seek to understand different cultural perspectives to advance diversity, equity, and inclusion				
CHALLENGE	I proactively adapt my actions to address the needs of people from marginalized identity groups				
	I proactively incorporate ideas and perspectives of people from marginalized identity groups				
ACCEPT	I proactively do everything within my power to correct and mitigate my behaviors that could result in inequitable outcomes				
	I find ways to speak up when I hear my colleagues say something that could be perceived as discriminatory				
ACT	I proactively include people from marginalized identity groups in key business decisions				
	I proactively challenge the status quo to advance diversity, equity, and inclusion				
	I proactively modify my behaviors in an effort to reduce opportunities for inequities and biases				
CONNECT	I frequently monitor the composition of my team(s) and broader networks to create equitable exposure and opportunity				
	I frequently celebrate the accomplishments of people from marginalized identity groups				
	I empower people from marginalized identity groups to contribute to key business decisions				

<sup>© 2024</sup> Deloitte Development LLC. All rights reserved.

Deloitte's DEI Institute™

#### **Additional information**

#### Methodology

A third-party research vendor interviewed 965 full- and part-time adult workers of US companies with 500 or more workers from July 17 through August 02, 2023. The survey vendor used its Probability Panel to capture data across five broad industry categories: Consumer; Energy, Resources & Industrials; Financial Services; Life Sciences & Healthcare; and Technology, Media & Telecom. Data was weighted to represent the residential adult population of the United States. The margin of sampling error for the complete set of weighted data is  $\pm$  3.8 percentage points. Weighting and further data analysis were accomplished using the R package.

#### **Authors**

**Joanne Stephane** Executive Director, DEI Institute™ Principal, Deloitte Consulting LLP **Heather McBride Leef** Managing Director, DEI Institute™ Deloitte **Kashima Atwood** Leader, DEI Institute™ Deloitte Services LP **Dhanushki Samaranayake, Ph.D.** Research Manager, DEI Institute™ Deloitte Services LP Sameen Affaf Research Manager, DEI Institute™ Deloitte Services LP **George Hardy** Senior Consultant, Deloitte Consulting LLP **Julian Sanders, Ed.D.** Research Lead, DEI Institute™ Deloitte Services LP Summar Shoaib, Ph.D. Writer, Deloitte Services LP

#### **Contributors:**

Christina Brodzik US Equity Client Services Leader Principal, Deloitte Consulting LLP **Devon Dickau** DEI Offerings Leader, Deloitte Consulting LLP David Levin, Ph.D. Senior Manager, Advanced Analytics, Data Science and Survey Advisory Team **Lindsey Manning** Strategic Marketing Manager, DEI Institute™ Deloitte Services LP Ana Medina DEI Strategy & Integration Manager, Purpose & DEI Office Deloitte Services LP Paula Payton, Ph.D. Senior Leader, Data Science and Survey Advisory Maria Porras Communications Strategist, DEI Institute™ Deloitte Services LP Sameen Salam Data Scientist, Data Science, and Survey Advisory Team Anna Wagner Workforce Equity & Sustainability Manager, Deloitte Consulting LLP

#### List of figures/Endnotes

#### List of figures

Figure 1: Respondent agreement with equity-related beliefs **Page 5** 

Figure 2: Seven practices to advance equity Page 8

Figure 3: Respondent frequency of engaging in equity-related behaviors Page 9

#### **Endnotes**

<sup>1</sup> Forbes Business Development Council, "The Business Case for Diversity, Equity and Inclusion," Forbes, May 11, 2023.

<sup>2</sup> Natasha N. Johnson, "<u>Leadership in Action: An Introspective Reflection. in D. Roache</u> (Ed.), Transformational Leadership Styles, Management Strategies, and Communication for Global Leaders," IGI Global, August 2023; Jakob Franzen, "Why Executive Self-Awareness is Important, and 3 Ways to Improve Yours," Forbes, April 25, 2023; Benjamin Laker, "The Value of Introspection in Leadership: Five Ways to Master It," Forbes, September 15, 2023; Bruce K. Berger and Elina Erzikova, "Self-Reflection is the Engine that Drives, Grows and Sustains DE&I among Leaders, Mentors and Public Relations Educators and Professionals," Journal of Public Relations Education 8, no. 4 (2022): pp. 59-90.

<sup>3</sup> The brief self-assessment (on p.29) is an excerpt from Deloitte Consulting LLP's Equitable Leadership Assessment. The full Equitable Leadership Assessment is a research-based, validated, comprehensive 360-degree diagnostic tool used to understand the behaviors leaders demonstrate that impact belonging and advance equitable outcomes. A rigorous 360-degree approach, including perspectives from others, is often a more accurate way to understand both perception and reality of one's equity-related behaviors. This brief self-assessment guidance is based solely on self-reflection for personal use.

#### Contact us

To discuss any of the ideas presented here, please send an email to: Deloitte's DEI Institute: USDEIInstitute@deloitte.com

#### About this publication

This publication contains general information only and neither Deloitte nor any of the other authors or parties involved with this publication, is by means of this publication, rendering accounting, business, financial, investment, legal, tax, or other professional advice or services. This publication is not a substitute for such professional advice or services, nor should it be used as a basis for any decision or action that may affect your business. Before making any decision or taking any action that may affect your business, you should consult a qualified professional adviser. Neither Deloitte nor any of the other authors or parties involved with this publication, shall be responsible for any loss sustained by any person who relies on this publication.

Deloitte's DEI Institute™

#### Deloitte.

#### **About Deloitte**

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"), its network of member firms, and their related entities. DTTL and each of its member firms are legally separate and independent entities. DTTL (also referred to as "Deloitte Global") does not provide services to clients. In the United States, Deloitte refers to one or more of the US member firms of DTTL, their related entities that operate using the "Deloitte" name in the United States and their respective affiliates. Certain services may not be available to attest clients under the rules and regulations of public accounting. Please see www.deloitte.com/about to learn more about our global network of member firms.