

# Diversity, Equity & Inclusion Roadmap

created by and for members of the Indiana Bankers Association July 2024



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# A Roadmap for the Journey

### A Process, Not a Project

As you begin this process, remember that it is exactly that - a process, not a one-off project. Don't be discouraged if you don't reach your desired outcomes in the first year; remember this is a cultural shift that will likely take time. Look for signs of progress instead of perfect performance.

### Find Your On-Ramp

Regardless of where you are on your Diversity, Equity and Inclusion journey as an organization, this roadmap is designed to help you find your on-ramp and get you where you want to be. There are ideas that may help you dig deeper, while also offering clearly marked concrete first steps if you are just starting out.



# Why This is Important



### **Community Bankers**

What better way to ensure your financial institution provides the products and services needed by your specific community than by making sure your team reflects your community?

### **The Business Case for Diversity**

At no point in this roadmap will you find a promotion for diversity for the sake of appearance. We firmly believe that having a diversity of viewpoints and perspectives at the table inevitably leads to better, stronger, more innovative ideas.

Pew Research found 56% of Americans feel Diversity, Equity and Inclusion is a good thing, and a majority of those whose workplace has policies in place saw a positive impact from them.

# Why This is Important

39%

Companies in the top quartile for gender diversity on executive teams are 39% more likely to have above-average profitability than companies in the bottom quartile *McKinsey, 2023* 

81%

Employees who said they would consider leaving a job if their employer did not demonstrate a commitment to Diversity, Equity and Inclusion

GoodHire, 2022

5.4X

Employees who trust that they and their colleagues will be treated fairly regardless of race, gender, sexual orientation and age are 5.4 times more likely to want to stay a long time

Great Place to Work, 2023

62%

Gen-Z job searchers who said they were more likely to apply to a company with a stated commitment to pay equity *Handshake*, 2021

"Diverse and inclusive workplaces earn deeper trust and more commitment from their employees."

# What It Means

### **Definitions**

### **Diversity**

Creating a community comprising people of different ages, cultural backgrounds, geographies, physical abilities and disabilities, religions, sexes, gender identities, sexual orientations, socioeconomic statuses, etc.

- U.S. Substance Abuse and Mental Health Services Administration

### **Equity**

Distributing resources based on the tailored needs of a specific audience. Equity recognizes that some communities will need more - or different - access compared to other communities.

- U.S. Substance Abuse and Mental Health Services Administration

### Inclusion

Ensuring people feel welcome. In the workplace, inclusion is the achievement of a work environment in which all individuals are treated fairly and respectfully, have equal access to opportunities and resources, and can contribute fully to the organization's success.

- U.S. Substance Abuse and Mental Health Services Administration

### Diversity, Equity and Inclusion are sometimes paired with other words, including:

### **Accessibility**

The design, construction, development and maintenance of facilities, information and communication technology, programs and services so that all people, including people with disabilities, can fully and independently use them.

- WhiteHouse.gov

### Belonging

The feeling of being accepted and valued for who you are; the sense of being part of something larger than yourself.

- The Society for Diversity

### **Justice**

Dismantling barriers to resources and opportunities in society so all individuals and communities can live a full and dignified life.

- The Avarna Group

# What It Means

**Definitions** 

### **Equality**



The assumption is that
everyone benefits from
the same supports. This
is equal treatment.

### Equity



Everyone gets the supports they need

### **Justice**



All 3 can see the game without supports or accommodations because the cause(s) of the inequity was addressed.

The systemic barrier has

been removed.

# What It Does Not Mean

Clarifications



### **Behavior, not Beliefs**

Diversity, Equity and Inclusion work is not about changing how or what anyone thinks, feels or believes about any subject. It is about setting expectations for employee behavior while in a professional setting.

### Perspective, not Appearance

While race, ethnicity and gender are arguably the attributes most often associated with diversity, don't aim for diversity of appearance, but diversity of perspective. Age, accessibility, religion, veteran status, socioeconomic background and more will also factor into someone's lived experience - and equip them to understand the needs of your customers who have the same experience.

# How to Get Where You Want to Be

### Find your on-ramp

### **Getting Started Road**

The IBA represents banks from small towns and large metropolitan areas, with staffs of equally diverse sizes. Each will have different needs, different capacities and starting points. That's why we decided to make this a roadmap: a tool that allows any bank - regardless of size, scope or starting point - to find their on-ramp and get where they want to be.

### **Road Signage**

For each of the following sections, there will be definitions to help you understand common Diversity, Equity & Inclusion verbiage, and ideas on how you can implement or increase programming to benefit your employees and community in each area. These ideas will range from initial conversations to get you started, to more in-depth ideas that can take existing ideas to the next level.

### All-In

Even if you are a large enough institution to have one or more employees dedicated solely to Diversity, Equity & Inclusion efforts, avoid thinking of it as its own department with its own budget, siloed off from the rest of the company.

For any of these efforts to truly take effect, Diversity, Equity & Inclusion has to be a culture shift that is absorbed into every facet of the operation.



# WHO: CULTURE AND TALENT



# Themes

Culture & Talent



### All-In

For Diversity, Equity & Inclusion to be successful, it cannot be treated as a department or program siloed unto itself. It's a culture shift; a mindset and approach that is applied to all other aspects of the bank's work from internal communications and HR benefits to financial literacy and vendor selection.



### **Experience, not Appearance**

Diversity and Inclusion are incredibly personal matters. It's not about appearance, but experience. Farmers, ranchers and other agricultural workers have a diversity of experience compared to those who have spent their entire lives in a city center.



### Communication

Issuing mandates can lead to frustration and burnout; casting a vision and inviting your team - at all levels - to be part of the organization's mission in a new way builds buy-in.



### Intentionality

Creating an Individual Development Plan for your employees won't benefit them if the plan isn't followed up with action that sets them on the path to accomplishing those goals.



### Language

"Training" can sound mandatory or compliance-based, while "learning" is an opportunity for growth and development. For example, Lake City Bank offers "learning opportunities." Employees are required to do a certain amount every year, but they have flexibility to customize which specific opportunities they want to attend.

# Culture

Overview & Definitions

### **ERGs**

Employee Resource Groups join together workers based on shared characteristics, interests or life experiences to provide support, enhance career development and contribute to personal development in the work environment.

### **Connection & Growth**

Opportunities for employees to come together to learn more about one another and their life experiences.



### **Professional Development**

Internal professional development can be expanded to include mediation and conflict resolution techniques, recognizing and addressing mental health concerns, and more.

### **Benefits**

Do your employee benefits align with the needs of an increasingly diverse workforce?

# Employee Resource Groups

### Talent & Culture

### **Examples**

- » Women
- » Black
- » Hispanic
- » People with disabilities
- » Young Professionals
- » Military/Veterans
- » LGBTQ+/Pride

### **No Exclusions**

Regardless of the point of commonality, make it clear that these groups are not exclusionary. Allies are welcome! These groups should be a safe place to ask questions and grow in addition to celebrating the group's culture and contributions.

### **Best Practices**

Meet monthly.

Events should be in-person, but "business meetings" where members are planning for a future event can be over Zoom to limit travel and out-of-office time.

Get a senior leader to really advocate and be voice for why these are important.

If you have multiple ERGs, have the leader(s) of each get together once or twice a year to prevent silos and see if there are cross-group synergies you can focus on.

Leverage the power of personal stories.

- a. Offer perspectives both from community members and allies.
- b. Include profiles in regular internal publications/
  newsletters, with a quote from their supervisor(s) about
  what impresses them most about this person. This shifts
  the focus from spotlighting diversity to instead spotlighting
  the person and their qualifications, talent and successes.

# Employee Resource Groups

### Talent & Culture

### **Increase ERGs' impact**

Remind group leaders to keep their discussions and events focused on three areas (*courtesy Old National Bank*):

### **Professional Development**

Work with team members to make sure they get skills, experience and exposure to be more mobile across the organization because banks want to attract, retain and develop talent.

### **Community Engagement**

Build the bank's brand in the community (e.g., Pride parades, mentor students of Color).

### **Business Enablement**

How do we advance the organization? Identify diverse talent across the organization and customer acquisition strategies (e.g., amplify mobile banking to better attract younger customers). ERGs can serve as internal focus groups to help better serve customers since they themselves are hopefully customers of the bank as well, helping you move beyond the "what" and into the "how" of your business goals.

# Employee Resource Groups

Talent & Culture

### **Too Small?**

Do you feel like your staff isn't large enough to support ERGs? Consider connecting with other small banks in your geographic area for joint ERGs.

ERGs - and Diversity, Equity & Inclusion overall - should be a space free from competitiveness. This is about pooling resources to build community and benefit the bank(s) as well as broader society.

These groups are meant to focus on the Inclusion aspect, becoming a driving force of inclusivity in your work culture.

Another great idea for smaller insitutions is Media Clubs, detailed on the next page.

### **Not Ready?**

Instead of starting new ERGs, you can instead create a Diversity, Equity & Inclusion Committee to help determine the tools and resources most needed by your employees.

This will give interested employees a chance to start having discussions before committing to a path forward.

All minutes from committee meetings should be public to the entire organization, and anyone who is not on the committee should still be allowed to attend even if they aren't able to vote so they can join in the discussion and have the opportunity to make their voice heard.

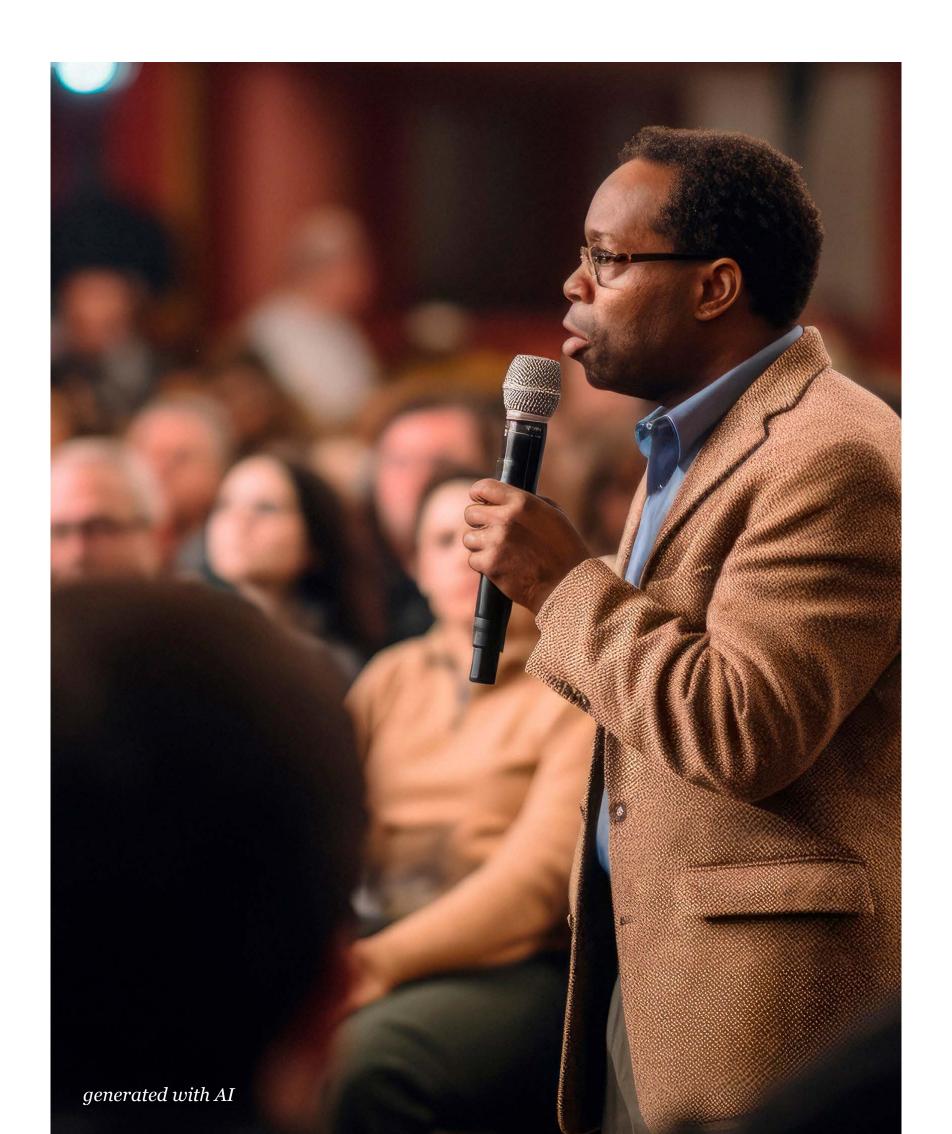
# Connection & Growth

Talent & Culture

### **Media Clubs**

Think "book club," but can also include podcasts, movies, etc., centered around Diversity, Equity & Inclusion topics.

Instead of development that presents a right and wrong, these are discussion-based and can feel safer for someone to ask questions. These are a good entry point if you don't have other Diversity, Equity & Inclusion efforts.



### **Webinar Series**

Topics can include accessibility and mental health awareness. These can be led by someone from your bank, but also a board member or someone external. Some of the best feedback can come from employee panels as people like to see and hear from people they know.

### **Intranet Groups**

Create specific channel(s) on your internal boards (e.g., Veeva Engage, Microsoft Teams, Slack)

# Benefits

### **Talent & Culture**

### **Professional Development**

If you have the resources for an internal program, you can customize it to your bank's culture. If you don't (or just want to supplement your internal program with additional resources), programs like <u>USF</u>, <u>eCornell</u> and <u>VISIONS</u> can all be helpful.

### **Paid Time Off**

Offer a pool of unrestricted PTO and/or floating holidays so non-Christian religious and secular/non-religious employees feel they are just as welcome and included.

### **Parental Leave**

Call it Parental Leave instead of Maternal Leave and extend to to all new parents. For the benefit of any single parents in your workforce, weigh whether 60% of their salary is enough for them to feel free to take the time they need or if they will feel rushed back to work before they are ready.

### **Health & Wellness**

Consider these benefits through a Diversity, Equity & Inclusion lens to ensure you are meeting the needs of an increasingly diverse workforce (e.g., gender-affirming care). Utilize anonymous employee surveys and ERGs for feedback on this and request a review by your insurance vendor(s) for any recommended adjustments.

### **Employee Handbooks**

Was yours written by an attorney 15 years ago? Consider re-working to add a human element back in. Extend this concept to job postings in place of EEOC boilerplate language to achieve the same human element outside the bank.

# INTENTIONAL COMMUNICATION

Communicate the intention and purpose behind your benefits offerings so employees understand the selection was curated with them in mind. This goes a long way not only in making them feel welcome but also helping them understand that if they feel there is a shortcoming, it is not for lack of care and they are welcome to come forward with suggestions for new benefits.

# How to Discuss

### Talent & Culture

When preparing for planned conversations in an Employee Resource Group or Learning Opportunity, it is important for your company to establish expectations on how employees are to engage with one another. Below are sources to consider or signs to keep an eye out for.

### **In-Groups & Out-Groups**

People tend to group themselves based on shared (or unshared) characteristics. These can be relatively harmless (e.g., favorite sports team) but can become problematic if based around more personal distinctions. Encourage anyone participating in the discussion to focus on experiences instead of identities, and to look for commonalities between "opposing" groups.<sup>1</sup>

### **Critical Dialogue**

The most important conversations are often the most difficult to have. They can become even more fraught when one or more of those taking part in the conversation are afraid to ask questions out of concern of using the wrong words when doing so. Keep in mind the acronymn TOOLS: Talk, be Open and authentic, be Optimistic, Laugh, and be Sensitive and strategic.<sup>2</sup>

### **Employee Relations**

Whether arising from an official event or everyday conversations, decide in advance how HR should respond to any employee complaints about inappropriate language, both in terms of how to address the issue with the employee who the complaint was filed against and what can then be shared back with the employee who filed the complaint. Remember that addressing these issues may help with employee retention as they help workers feel heard instead of bottling up any frustrations they may be experiencing.

### **Brave vs. Safe**

Having conversations about these topics may be difficult for some people, whether because of bad past experiences or simple lack of experience. This is about creating a brave space where they feel confident enough to express themselves and their questions, not a safe space that eliminates hard topics.<sup>3</sup> **It all comes down to respect.** 

<sup>&</sup>lt;sup>1</sup> "In-Groups, Out-Groups, and the Psychology of Crowds," <u>Psychology Today</u>

<sup>&</sup>lt;sup>2</sup> "Moving Beyond Critical Thinking to Critical Dialogue," <u>Innovative Higher Education</u>

<sup>&</sup>lt;sup>3</sup> For more, also consider "<u>Crucial Conversations</u>" from McGraw Hill

# Talent: Early Career



Culture & Talent

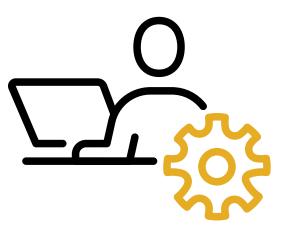
Foster your intern programs and be open to allowing interns to stay on as part-time employees and/or on a remote basis after their internship ends and they go back to school. This can turn into a feeder program when they graduate and are ready for full-time work.

If the pool of candidates for your internship program and early-career professional job openings isn't as diverse as you're looking for, are you advertising those opportunities in such a way that a diverse pool of candidates will even be aware of your openings (e.g., trade schools, Ascend Indiana)? Consider adding your diversity and/or equity statement to job postings as Gen Z has shown a preference for applying to companies with stated diversity and equity commitments.

Go to career fairs and speak to candidates with diverse skillsets.

Teachers make great ambassadors for your financial literacy programs. IT & cybersecurity professionals are increasingly needed. Attorneys, marketers, HR professionals, etc. can all be "bankers" as well.

# Talent: Mid-Career



### Culture & Talent

If mid-career positions are not hitting your Diversity,
Equity & Inclusion targets,
is the source of the problem
in the hiring phase/not
getting a diverse enough
pool of candidates, or are
diverse employees in-house
not ascending at the same
rate as their majority peers?

Plot Individual Development Plans for your employees at every level, tailored to their personal goals. Be sure they aren't just saying what they think you want to hear but are truly describing where they want to go. Make sure they understand that their boss leaving or getting promoted aren't the only ways they can advance in the company. Look for ways their skillset can translate to other departments, ascending diagonally, so they can see a clear path into the future with the company.

Be careful with your
language here so as to
convey that you are open to
all candidates for any open
position, without falling
into "checking the box"
mentalities.

in the mid-career tier to understand what a crucial part they play in this process. They are some of the most impactful at establishing a pipeline of diverse talent.

# Talent: Senior Talent



**Culture & Talent** 

This is the hardest area to begin hitting DEI targets because of the dearth of positions that exist and the infrequency with which they become available.

Look for other ways to get future executives involved, like Old National's CEO Council (mid-level diverse talent, focused on ethnic and gender diversity, are invited to work on a high-impact business project so they are prepared to take on more senior leadership positions within the company when they do come available).

If existing majority talent in senior positions get anxious about helping to implement these policies, see if the issue is their own concerns about "What happens to us, then?" These programs aren't about kicking anyone out, but shaping and mentoring the next generation to leave the strongest possible legacy.

When establishing your

Succession Plan, include the

value of diversity as a measure to

consider when choosing the next
in line.



# Themes

Banking Product Enhancements & Supplier/Vendor Diversity



### **Internal to External**

The products and services your institution offers will expand your efforts from *internal* Diversity, Equity & Inclusion to *external* Diversity, Equity & Inclusion.



### **Measuring Success**

Don't measure success by whether you can earn a certification or pass an ADA accessibility test. Rather, measure your success by whether what you offer can fully meet the needs of your clients and employees.



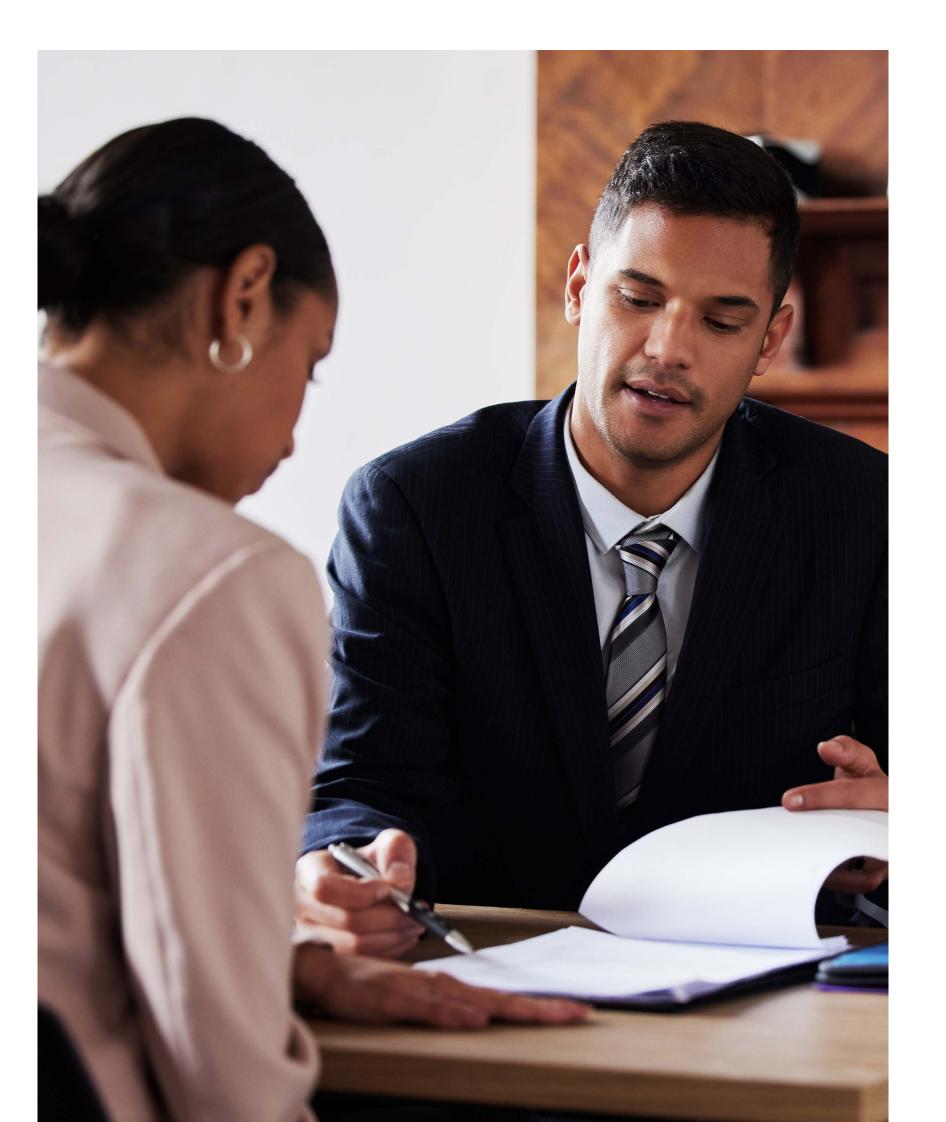
### **Promoting Success**

There's nothing wrong with bragging about your Diversity, Equity & Inclusion percentages – include a page on your website detailing your board makeup, supplier diversity, etc.

# Language Accessibility

**Banking Product Enhancements** 

a personal checking or savings account comes with legal paperwork; mortgages and other loan documents can feel like mountains of it for a borrower. Now imagine all that complicated legalese is written in a language you don't speak. How confident would you be in signing it?



Recreating all your documentation into another language is not a simple feat. Because of that complicated-but-necessary verbiage, it needs to be handled by a professional translator and/or attorney who is fluent in the second language. Community banks will need to make the most of their resources to get the greatest impact for those they serve, from legal paperwork to financial literacy courses and beyond.

# Language Accessibility

### **Banking Product Enhancements**

- » What language(s) make the most sense for your area?
- » Make sure your translations of legally mandated disclosures will pass muster.
- » Consider having a quick key phrase/resource guide that all public-facing employees can keep at their desk.
- » Bilingual employees can offer language classes to other employees as a free benefit of employment, empowering them to handle front-line customer interactions.
- » A call-in number can help spread multilingual resources across all your institution's branches, both for customers to call in directly and for CSRs to put on speaker phone to walk customers through a product or service, or what's written on a document.
- » Vendors can translate your website, activated by a toggle button that automatically converts everything on the site into your language of choice. These designs allow for separate analytics for each side of the site. Be sure that your ATMs have the same multilingual capabilities.

- » Is it more efficient for your institution to license financial literacy content from a vendor, or create your own and have it translated?
  - \* National Financial Educators Council content is inexpensive enough that many community banks can still afford it.
  - \* EVERFI from Blackbaud has a good reputation, but cost is scaled by asset size so it may be cost prohibitive for larger community banks.
  - \* IBA-member banks that have committed to teaching this content in the community have started receiving requests from schools to teach a few units to their students.

Remember that multilingual accessibility isn't limited to spoken language. Are your resources available via braille for visual-impaired clients? This includes ATMs to maintain privacy when clients are receiving information about their accounts while in public.

Don't feel like you have to do everything at once - create a roadmap for implementing each element of your multi-lingual plan.

# Suppliers & Vendors

### **More Than a Checkbox**

When working with a potential vendor to see if they qualify as "diverse," remember that diversity is about experience, not a box to be checked. An easy way to start is literally make the process more than a box to be checked. When they fill out their application/respond to your RFP, include a text box where they can tell their story explaining their experience.

One potential vendor that made it to the final round of an RFP process with the IBA was exclusively staffed by women who were married to veterans and active-duty military members. Strictly speaking, this group may not qualify as veteran-owned, but after hearing their story, we would have included them as a military/veteran-led supplier.

Along a similar line: consider expanding your definitions of diversity beyond who owns the organization to who leads the organization. What's the makeup of their C-suite? Their board of directors? Their staff in general?

### **Getting Started**

If you have misgivings about introducing these qualifications for business-critical vendors, divide your suppliers into critical and non-critical – those that impact your daily operations vs. those that don't. Start with the non-critical suppliers as a test group so you can apply any lessons learned when you're ready to move to the critical suppliers.

### SETTING AND MAINTAINING STANDARDS

You can create your own set of standards for what you consider as qualifying as diverse, or you can use a third-party like CVM, a supplier.io company.

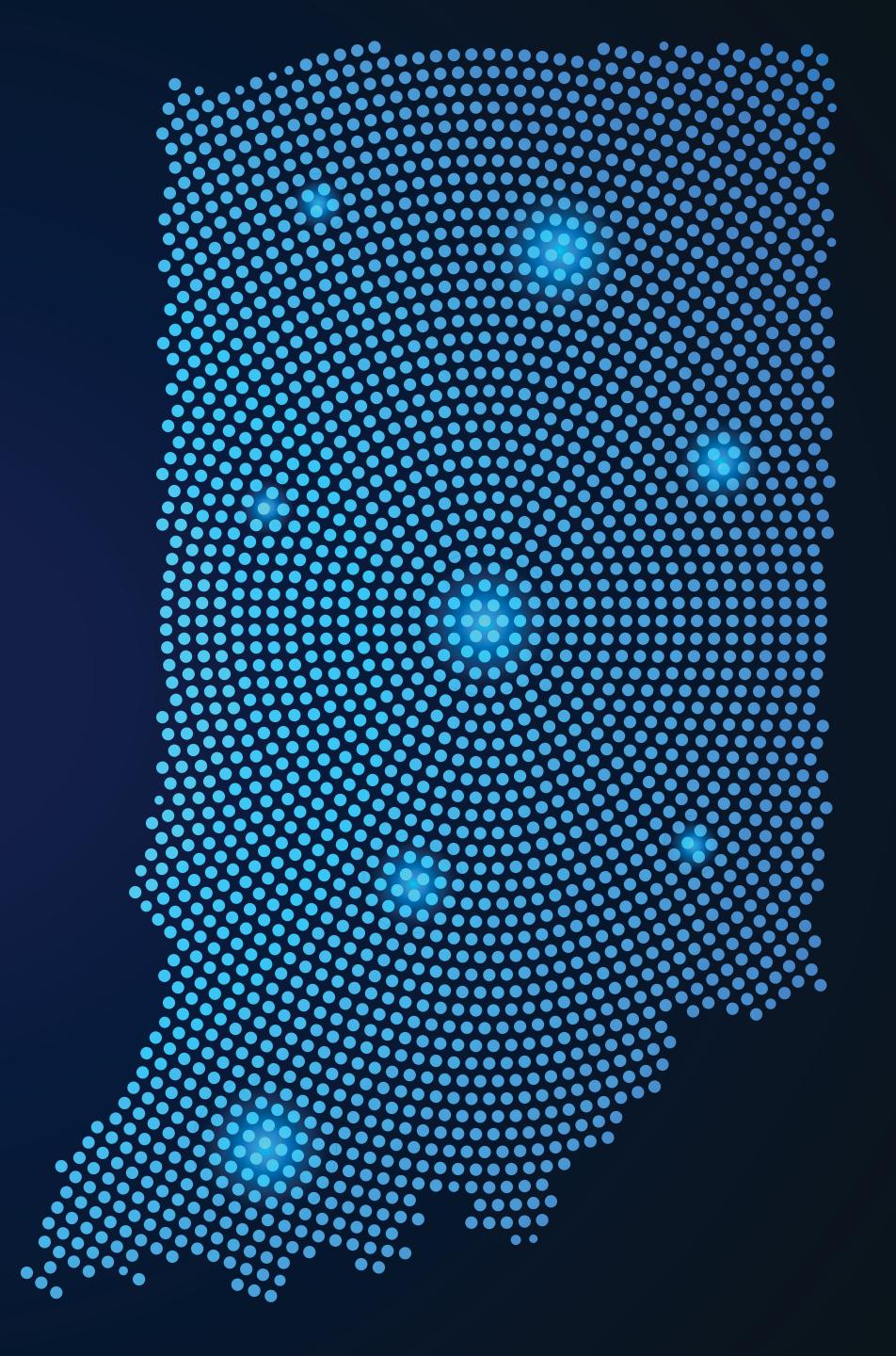
### Potential categories include:

- » women-owned or -led
- » minority-owned or -led
- » disabled-owned or -led
- » veteran-owned or -led
- » LGBTQ-owned or -led
- » small businesses
- » local/headquartered within your service area

Identify the benchmarks

you want to hit within each
category and the timeframe on
which you want to hit them.
Goals should be specific,
measurable and attainable.

# WHERE: BANKING DESERTS AND COMMUNITY OUTREACH



# Themes

Banking Deserts & Community Outreach



### **CRA**

Reaching out to the unbanked and underserved populations in your community is a perfect opportunity to fulfill your CRA obligations, connecting your DEI efforts to immediate ROI for the bank.



### **Relationship Building**

People like doing business with those they know and have similar experiences. Encouraging or even requiring volunteerism to get your bankers into the community is a great first step.

# Reaching the Unbanked

Banking Deserts & Community Outreach



The BankOn initiative, backed by the CFE Fund, helps get the unbanked and underbanked into the traditional banking system.

It costs nothing for a financial institution to take part in the program, but there are requirements on how you can run any accounts that are under the BankOn branding (e.g., no overdraft fees, all fees combined cannot total more than \$5/mo). Your institution does have to get certified by the program and then re-certified every few years to prove you are properly maintaining your accounts.

If you had negative experiences with the BankOn program in the past, they refreshed their program about two years ago into a far better product that the American Bankers Association now encourages participation in. It's also an incredible source of CRA credit.

Learn more at JoinBankOn.org.



# Unbanked, LMI & Next-Gen

Banking Deserts & Community Outreach

### **Credit Building**

Help customers from lower socio-economic statuses build their credit and get out of the payday-lending system with programs like small-dollar personal loans, CD-secured loans or secure credit cards.

### **Down Payment Assistance**

The <u>HomeBoost Minority Down Payment</u>

<u>Assistance Program</u> is available for FHLBImember institutions to offer to ethnic minority
first-time homebuyers in Indiana or Michigan
with household income at or below 120% of the
local Area Median Income.

### **Money Masters**

This Federal Home Loan Bank of Indianapolis program will fund bank accounts for 17- and 18-year-olds at FHLBI-member institutions up to a combined \$25,000 per year for three years to help teens learn money management.

### **Next Generation Customers**

Develop programming for kids and teens, including teaching teachers how to teach financial literacy to that age group. Partner with your local schools now that state law requires financial literacy education, then also meet kids where they are - TikTok, podcasts, your app - instead of requiring them to come into the bank.

# No Silos

Banking Deserts & Community Outreach

### Before going outside your bank, make sure everything is lined up inside your bank.



### **Public-Facing Staff**

If you have products that work well for the unbanked, make sure you're actually pushing them. This involves conversations and learning opportunities with your tellers, CSRs and other public-facing employees.



### Leadership

Arrange regular meetings among your executives from the same department but different markets to make sure everyone knows what's working, what's available and how to hit your Key Performance Indicators.



### **Easiest Customers**

Make sure your own people know about and are using your products. It not only makes them more likely to promote the products, but also sets them up to more easily connect with customers who need those offerings.

# Volunteerism

Banking Deserts & Community Outreach



Post ideas on your intranet, and offer paid volunteer time; Kadince and CyberGrants/
Bonterra are software options for tracking CRA hours



Offer awards for the top
volunteer(s), both to recognize
their efforts and to encourage
employees to log their time for
CRA requirements; one option
is allowing them to donate
\$500 to a charity of their choice



Share updates internally about top individuals and collective annual support so employees know they are part of an organization that is making an impact on the community in which they live and work



Make sure to tell the story of what you're doing. Submit to Hoosier Banker's Banking on Community section but also tell in your own community; can also include when calling on corporate and nonprofit clients

"When employees are proud of their work, they are 2.2 times more likely to stay with an employer."



# What Does Success Look Like?

More: Getting Started

### **Data Points**

A few potential data points that you can use to gauge your success:

- » Participation in learning opportunities
- » Turnover (remember that this CAN be a sign of success, but many factors play into it so it isn't a clear indicator)
- » Demographics of customers (as a sign of your external programs and/or changing employee demographics)
- » CRA rating

Whichever data points you decide on, be sure to establish baseline performance before starting any new programs.

### **Data Sources**

You may not need to undertake new surveys. Many measurable data points can be found in Best Places to Work surveys.

If you do an annual employee satisfaction survey, you can measure year-over-year differences in how included employees feel when it comes to company culture.

### **Set Expectations**

If you don't hit all your metrics in the first year, don't let that feel like failure. Diversity, Equity and Inclusion represent cultural shifts that won't always happen quickly. It may be a years-long process, especially if you are phasing in multiple projects over time. **Look for progress, not perfection.** 

# Glossary

### Recap of Key Terminology

### **Accessibility**

The design, construction, development and maintenance of facilities, information and communication technology, programs and services so all people, including people with disabilities, can fully and independently use them.

WhiteHouse.gov

### **Belonging**

The feeling of being accepted and valued for who you are; the sense of being part of something larger than yourself.

The Society for Diversity

### **Critical Dialogue**

More than communication skills, this is an active group process and opportunity for students and faculty members to learn how to engage in civil, respectful, difficult conversation.

Libby V. Morris, Innovative Higher Education

### **Diversity**

Creating a community comprising people of different ages, cultural backgrounds, geographies, physical abilities and disabilities, religions, sexes, gender identities, sexual orientations, socioeconomic statuses, etc.

Substance Abuse and Mental Health Servies Administration

### **Employee Resource Groups**

Also known as Affinity Groups, ERGs join together workers based on shared characteristics, interests or life experiences to provide support, enhance career development and contribute to personal development in the work environment, while being inclusive of those who do not share said characteristics, including allies and those wishing to learn more.

### **Equity**

Distributing resources based on the tailored needs of a specific audience, recognizing that some communities will need more - or different - access compared to other communities.

Substance Abuse and Mental Health Servies Administration

### **Inclusion**

Ensuring people feel welcome. In the workplace, this is the achievement of a work environment in which all individuals are treated fairly and respectfully, have equal access to opportunities and resources, and can contribute fully to the organization's success.

Substance Abuse and Mental Health Services Administration

### **In-Groups/Out-Groups**

People tend to group themselves based on shared (or unshared) characteristics. These can be relatively harmless (e.g., favorite sports team) but can become problematic if based around more personal distinctions.

Susan Krauss Whitbourne, PhD, ABPP, Psychology Today

### **Justice**

Dismantling barriers to resources and opportunities in society so all individuals and communities can live a full and dignified life.

The Avarna Group

### **Media Groups**

Think "book club," but can also include podcasts, movies, etc., centered around Diversity, Equity & Inclusion topics. Instead of development that presents a right and wrong, these are discussion based and can feel safer for someone to ask questions. These are a good entry point if you don't have other Diversity, Equity & Inclusion efforts.

# Acknowledgments

Thank you to those who helped make this project happen

### **IBA Diversity, Equity & Inclusion Committee**

Thank you to the dedicated members of the Association's Diversity, Equity & Inclusion Committee who met regularly over the course of two years to decide on the structure and content of this roadmap:

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