

September 2024

Diversity, Equity, and Inclusion Playbook

A guide for Chapter Leaders



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Summary

Diversity, equity, and inclusion (DEI) is a framework aimed at fostering a workplace culture where all individuals, regardless of their background, feel valued, supported, and have equal opportunities for growth and success.

This document provides guidance for chapter leaders across the Project Management Institute (PMI) network with recommendations and guidelines. Please refer to this document when implementing DEI strategies as a part of your projects and teams.

The chapter leaders DEI playbook **provides crucial resources**, such as guidelines, recommendations, and step-by-step strategies for implementing and managing DEI initiatives, and empowers chapter leaders to better understand how to foster an inclusive and diverse atmosphere.

This document **raises awareness** about the importance of DEI and the benefits it brings to your chapter, including improved innovation, volunteer leader satisfaction, and overall chapter performance.

It also **outlines metrics and indicators** that can be used to track progress and hold leadership accountable for achieving DEI goals.

In summary, this DEI playbook **empowers chapter leaders** by providing a roadmap to create a more diverse, equitable, and inclusive environment. It helps the organization tap into the full potential of their membership, drive innovation, and maintain a positive reputation in an increasingly diverse and socially conscious world.

PMI culture values and behaviors

Our culture is a community-wide agreement of how we get things done, how we treat each other, and how we can all expect to be treated. It's expressed through values and behaviors, or guiding principles that demonstrate who we are and continually aspire to be. At PMI, we've defined five culture values:

- Make It Easy
- Aim Higher
- Be Welcoming
- Embrace Curiosity
- Together We Can

With our DEI strategy and this playbook, we aim to reinforce behaviors specifically associated with *Be Welcoming*, such as:

- Creating genuine belonging for all, because our differences make us stronger.
- Acting with humanity and showing care, empathy and respect for others' needs.
- Assuming good intent and seeking to understand, not judge.

Introduction

PMI understands that DEI initiatives are crucial for promoting social justice, reducing disparities, and unlocking the full potential of volunteer leaders and chapter membership. By embracing diversity, promoting equity, and fostering inclusion in our membership, we create more equitable and thriving environments for our chapters.

By recognizing and valuing differences and actively seeking to involve people from varying backgrounds and perspectives, we level the playing field and address systemic barriers to encourage participation. Diversity alone is not enough, we must strive to create inclusive chapters that promote equity, respect and equal opportunity for our membership.

We aim to be all inclusive and poise our volunteer leaders to implement diversity, equity and inclusion-focused strategies, policies and best practices within your chapters create an inclusive culture for all.

The purpose of this playbook is to empower chapter leaders like you to assess and review your directorship's level of DEI at various stages, and ensure you're equipped to deliver an engaging DEI environment for all volunteers and the wider chapter community.

We'll accomplish these goals together through the following strategies:

- Advance inclusivity and belonging in the chapter by aiding the development of DEI Policies, creating an inclusivity Charter, and establishing Rules of Engagement.
- Equip chapter members with strategies and skillsets that are integrated into their own practices by creating DEI trainings, leading DEI focused discussions, inviting DEI Speakers to chapter events and developing a Mentorship Program (Chapter Members and Community).
- Increase volunteer engagement by fostering social connection and inclusion among the volunteer community, recruiting more diverse volunteers from different industries and, educational, and cultural backgrounds.
- Support volunteers in their personal and professional development by offering mentorship and training, ensuring that it's inclusive in its delivery methods and accessible for learners with different abilities.
- Consider succession planning activities when incorporating DEI practices.

Chapter's diversity, equity and inclusion: journey stages

The four stages of chapters' diversity, equity and inclusion journey:

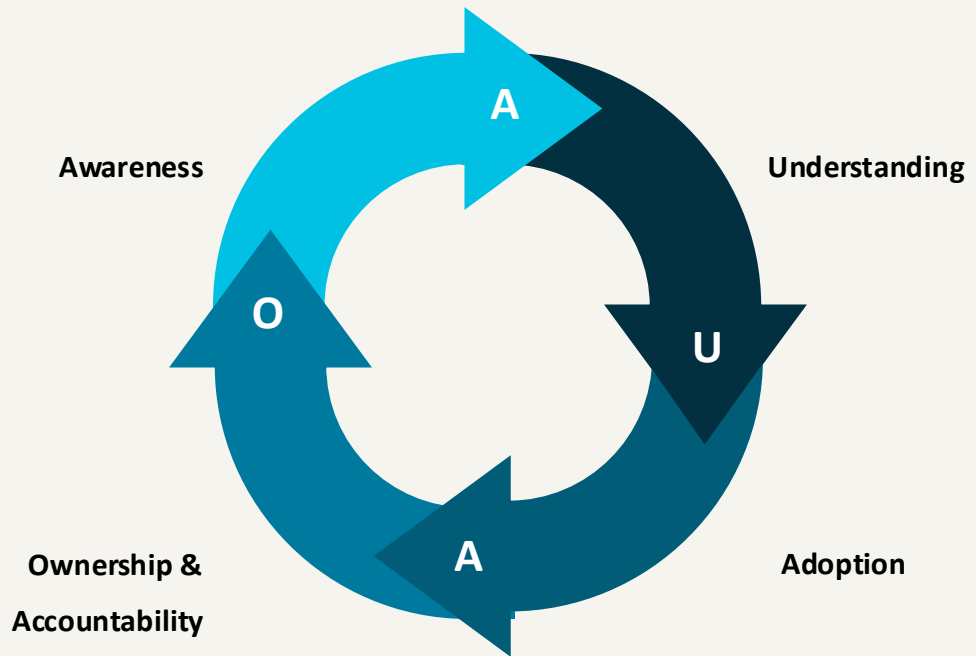


Figure 1: The four stages of a chapter's DEI journey

Using the DEI scorecard for chapter assessment

The score at the end of each section of this playbook serves as an insightful self-assessment resource, designed for chapter leaders to evaluate their DEI efforts within the unique context of their chapter. As a collaborative tool, it is recommended that chapter leaders work closely with their board to review these DEI activities. By auditing their chapter's DEI progress through a series of key activities and questions, chapter leaders will receive a score that offers value insights and highlights areas of strength and opportunities for improvement, to drive impactful and lasting DEI change.

Stage 1: awareness

Introduction and background primer

PMI is one of the most diverse organizations in the world, boasting over 680,000 and 300 chapters across the globe. It's important that our members recognize and value the inherent diversity within our global organization, chapters, and the communities we serve. Awareness of this diversity should also extend to speakers for events as well as vendors for chapter needs and sponsorship. After all, awareness is crucial for the successful adoption of any change.

Definitions of diversity include:

- **Legacy diversity**, which reflects differences in physical attributes, such as race, ethnicity, age, gender, ability, and sexuality.
- **Experiential diversity** is a function of our physical and social identities; the impact those identities have on our life histories and lived experiences. (e.g., generational differences).
- **Thought diversity** examines how our neural makeup and lived experiences impact our problem-solving, both in terms of the biological hardwiring of the brain and what occurs when two previously unrelated thoughts are connected in a new way – revealing new insights.

(Sources: Diaz-Uda, A.S., Medina, C. Schill, B. (2013). Diversity's New Frontier. Asperian Global. (2015) Leaders in Diversity and Inclusion: 5 Lessons from Top Global Companies.).

Often diversity, equity and inclusion are grouped together because of their interconnectedness, and it's only in combination that their true impact emerges. Other related concepts include **Belonging (B)**, **Justice (J)**, and **Accessibility (A)**.

Because these terms can be easily misunderstood, it's important to grasp their individual meanings and implications, at PMI we define these for chapters as:

- **Diversity** refers to how an individual or group differs from another, who is represented, aspects of human differences, social identities, and social group differences.
- **Equity** refers to the fair treatment of an individual or group according to their respective needs; fair treatment for all where identity is not predictive of opportunities or outcomes.
- **Justice** refers to the systematic and proactive reinforcement of norms, practices, policies, and cultural messages needed to achieve and sustain equity for all.
- **Inclusion** refers to how people experience the chapter and the degree to which PMI embraces everyone and enables them to make meaningful contributions, especially for people who might otherwise traditionally be excluded or marginalized.
- **Belonging** is feeling welcomed, where everyone is treated and feels like a full member of the chapter and can thrive within the chapter by bringing one's authentic self to their role.
- **Accessibility** is the design, construction, development and maintenance of facilities, information and communication technology, programs and services so that everyone in the chapter, including people with disabilities, can fully and independently use them.

Building a culture of DEI is a journey and looks different for each chapter. Some chapters are more advanced in their journey and have a well-established sense of belonging for all their members. For other chapters, this journey may be slow, the challenges large, and the impacts significant, but there are ways to approach it.

Timeline:

Chapter leaders should approach DEI as a strategic program similar to professional development programs that require specific activities like event planning. Building and implementing a strategy can seem overwhelming. However, taking well thought-out steps will progress your chapter on a successful DEI path:

- Set SMART goals and objectives. (Specific, Measurable, Actionable, Realistic, Time-bound)
- Understand the current environment and its nuances.
- Address the gaps for the target state.
- Build a plan to close the gaps including reasonable/achievable milestones.
- Implement the plan by creating the conditions for meaningful change.
- Developing respective implementation plans with concrete action steps to ensure those goals and objectives are achieved.

Examples of activities that would help you build an acceptable level of awareness in your chapter might include:

- Chapter Leadership workshops on DEIBA
- Trainings on microaggressions and bullying
- Diversity stand-ups, intersectionality exercises, empathy workshops
- DEI Conversations & Coffee / sharing DEI stories
- DEI Awareness Assessments, SWAT and SOAR Analysis
- Diversity Critical Thinking Diagramming
- Demographics survey of membership (link to global survey from DEI Insight Team)
- DEI Council/Committee/Task Force
- Business resource or special interest groups
- Allyship training ([refer to LeanIn.org allyship kit](#))
- Additional resources @ SHRM Together Forward

Source: [2022 McKinsey Study "What is diversity, equity, and inclusion?"](#)



Awareness score chart

Use this self-assessment tool to audit DEI activities within your chapter. It is recommended for one chapter leader to work with the chapter board to review these activities in the "chapter's context". Combine all scores at the end to reveal your DEI chapter score.

What it includes	Y/N	Points
As chapter leaders, we are aware of DEI		2
As chapter leaders, we are aware that DEI has different definitions		2
As chapter leaders, we are aware that DEI can impact the chapter		2
As chapter leaders, we are aware that diversity, equity, inclusion, providing a feeling of belonging, accessibility can bring people closer and help the chapter grow		2
As chapter leaders, we are aware that trainings or awareness sessions on DEI will help the chapter		2

Total Score (out of 10):

Stage 2: understanding

Why should we understand?

PMI chapters operate in diverse and multicultural environments and are formed by individuals from a variety of professions, geographies, ethnicities and work cultures. To thrive in this complex landscape, it's essential for chapter leaders to develop a clear understanding of DEI principles. And more so, a comprehensive understanding of where your chapters stand when it comes to incorporating DEI in their setup and daily activities.

DEI goes beyond mere compliance; it's about creating a culture of respect, belonging, and equal opportunity for all individuals involved with a chapter. By prioritizing and understanding DEI, chapter leaders can foster an environment where all chapter members, regardless of their background, will thrive and contribute to overall chapter success. Understanding your chapter's DEI standing is a critical step toward building inclusive cultures that reflect the diversity of the PMI community and set the stage for the subsequent dimensions of adoption and ownership throughout the chapter's DEI journey.

Case example: lack of accessible and inclusive communication

Mark is a brilliant Project Manager with extensive experience in marketing and public relations. He also has a hearing impairment. Despite having excellent skills, Mark faces subtle barriers that impede his full integration into his local chapter and its ongoing projects. The chapter meetings are typically vibrant, with passionate discussions and brainstorming sessions. However, without proper accommodations for Mark's hearing needs, he often finds it difficult to actively participate in fast-paced conversations.

Feeling increasingly isolated, Mark's contributions in the chapter dwindle. He struggles to follow group conversations and feels reluctant to continuously ask for clarifications, fearing it might be perceived as a weakness.

Slowly, Mark withdraws from team activities, unable to fully engage in the collaborative process. His frustration grows as he feels that his potential is going untapped, and that there is no space for his expertise within the chapter.

Unaware of the underlying issue, the chapter leadership notices a decline in Mark's involvement and starts questioning his dedication, despite him signing up with enthusiasm to serve within the marketing docket. When approached, Mark expresses his struggles with the communication barriers but feels disheartened by the lack of consideration for his needs, as nothing seems to change. He therefore decides not to renew his chapter membership.

Ask and reflect:

1. Consider the recent departure of a talented team member such as Mark, who felt disengaged due to communication barriers and a sense of exclusion. How can you as a chapter leader proactively address and accommodate diverse communication needs and ensure that everyone feels a sense of belonging and empowerment within your chapter's activities and projects?
2. Reflecting on your current chapter culture, do you believe that you have a strong grasp of DEI principles? If not, what specific areas do you think your chapter could improve on to foster a more inclusive and diverse environment that embraces the diverse talents and perspectives of all chapter members?

Case example: ignoring intersectionality

Aisha is a woman of color and an immigrant whose unique experiences intersect, presenting a distinct perspective that's often overlooked or misunderstood. Her chapter's leadership— though well-intentioned, and primarily made up of natives — has focused primarily on gender diversity initiatives, assuming they would encompass all aspects of inclusivity. Leadership fails to recognize that Aisha's challenges and experiences are shaped not only by her gender, but also by her ethnicity and cultural background.

Over time, Aisha continually feels excluded, unheard, and as if her perspective — as a woman of color and immigrant remains on the periphery. Her chapter doesn't understand that true inclusivity requires the recognition and valuing of the multifaceted, intersectional identities of all its members.

Ask and reflect:

1. How well does your chapter recognize and understand the intersectional identities of its members, like Aisha's, which combine different elements?
2. Are there mechanisms in place to identify, actively listen to, and understand the perspectives of individuals who may feel marginalized due to intersectional identities?

Benefits of understanding your chapter's DEI efforts and opportunities for improvement

What are some of the benefits of understanding your chapter's DEI status better?

- 1. Understanding leads to identification of areas of improvement (mitigating any discrimination and bias):** By understanding your chapter's DEI efforts, you can identify areas that need improvement. This proactive approach helps in mitigating discrimination and bias, creating a more inclusive and fairer environment for everyone.
- 2. Understanding your chapter's diversity leads to increased chapter engagement and retention:** When members feel that their diverse perspectives and backgrounds are understood, valued and respected, it enhances their sense of belonging and commitment to the chapter. This, in turn, leads to higher engagement and better retention rates.
- 3. Understanding your chapter's DEI status allows the maximization of talent and innovation:** Understanding and embracing diversity within your chapter ensures that you're tapping into a wide range of talents, experiences, and viewpoints, and accommodating them efficiently. This thought diversity sparks innovation, leading to creative solutions and fresh ideas that might otherwise remain untapped.
- 4. Understanding your chapter's DEI status strengthens relationships and collaborations within your chapter:** Understanding your chapter's DEI efforts empowers members to understand each other better. It helps collectively foster an atmosphere of respect and understanding. This not only strengthens relationships among chapter members, but it also encourages collaborations. Different perspectives lead to more robust problem-solving and effective teamwork.

Best practices and research: what do successful chapters/organizations understand about their DEI efforts?

- 1. The importance of inclusive leadership:** Successful chapters and organizations grasp the importance of inclusive leadership, recognizing that leaders play a crucial role in fostering an inclusive culture, setting the tone for the entire group, and leading by example.
- 2. The distinction between equity vs. equality:** Understanding the distinction between equality and equity; instead of applying a one-size-fits-all approach, support and resources are tailored to individual needs. This ensures that everyone has a fair opportunity to succeed, acknowledging that true equity may require different levels of support for different individuals or groups.
- 3. The importance of continual learning:** Prioritizing continual learning and relying on a data-driven approach by investing in training for chapter members. Members are continually updated on DEI issues and best practices; this commitment to ongoing education helps build a more informed and responsive community.
- 4. The value of active listening:** Ensuring underrepresented voices within the chapter are heard, create safe spaces are created for open dialogue and feedback, allowing members to better understand the unique challenges faced by different groups and make more informed decisions.
- 5. The importance of transparency and feedback loops:** Establishing feedback mechanisms to gather input from members regarding DEI initiatives and using this feedback to make necessary adjustments and demonstrate that the organization values member perspectives. Open communication about the chapter's DEI efforts, sharing both successes and challenges, highlights a commitment to transparency and accountability.

- 6. The long-term vision:** Knowing that DEI efforts aren't quick fixes, but require a long-term vision, the commitment to sustainable change and understanding that results may take time to materialize. They understand that patience and persistence are key to achieving lasting and meaningful progress in DEI.

Action planning

How can you deepen your understanding of DEI in your role as a chapter leader?

To deepen your understanding of DEI in your role as a chapter leader, consider the following actions, which should be viewed as continuous, and not isolated events. These actions aim to create ongoing opportunities for reflection as a chapter, fostering a deeper and more structural incorporation of DEI practices:

1. Start by consistently examining your own biases, beliefs, and experiences to gain insight into their influence on your leadership decisions. Fostering self-awareness is an essential initial stride towards promoting DEI.
2. Conduct a diversity audit of chapter members
3. Diversify chapter leadership
4. Review existing policies and practices
5. Conduct listening sessions with chapter members
6. Incorporate anonymous surveys and feedback
7. Seek external consultation and advice
8. Conduct cross-chapter benchmarking
9. Review past DEI incidents and feedback
10. Provide continuous learning and education



Self assessment and reflection

- 1. Within your chapter, what are some of the ways in which you implemented DEI practices?
- 2. What areas of DEI do you feel your chapter is most comfortable with, and which areas do you also struggle with?
- 3. How has your background and experiences influenced your perspectives on DEI within the chapter?

Understanding score chart

What it includes	Y/N	Points
As chapter leaders, we have deep understanding of DEI best practices (in our context)		4
As chapter leaders, we have a deep understanding of chapter's standing when it comes to incorporating DEI in its setup and daily activities		4
As chapter leaders, we understand DEI strategies for the chapter would lead to increased member engagement and retention, relationships and collaboration within the chapter		4
As chapter leaders, we understand DEI would allow maximization of talent and innovation		4
As chapter leaders, we understand how to identify and address unconscious biases in myself and the chapter leadership team that can influence decisions for the chapter		4

Total Score (out of 20):

Stage 3: adoption

Inclusive projects:

Chapter operations require projects, and it's up to administration to adopt an inclusivity framework to demonstrate DEI. Consider the pointers below to ensure that you're adopting the latest DEI framework. Refer to the Role Delineation Study (RDS) to ensure each chapter leader is fully aware of their responsibilities. This is essential to drive change from within their directorate. The first area to consider is your workforce, i.e. volunteers, supply chain, etc.

- **Talent:** When selecting the talent you work with, being intentional in your selection process is a great way to start. This applies to the team members you are appointing in your directorate, the volunteers you are seeking and engaging with, and any committees and sub-committees you're appointing to support the chapter's strategy.
- **Supply chain:** Ensuring you have a framework to select suppliers and a framework to monitor their performance drives further awareness into your chapter's operations. This could mean having criteria in place to cover the areas listed below: *(the list is an example and not exhaustive)*
 - Diverse and minority suppliers
 - Procurement points in award scorecards for DEI excellence
 - Agreements and T&C document review to accommodate and outline DEI responsibilities across all partners

Running a dynamic chapter operation in an inclusive environment means considering the different work and volunteering styles of the entire team. For instance, accommodating those who require advance notice for actions and more time before reaching a decision is equally important to considering those who enjoy an environment of risk taking and freedom from quick decisions and problem solving.

To ensure your chapter fosters an environment of inclusion, and considers the different leadership styles within the chapter, consider the following areas:

- **Meeting management:** Having an agenda for a meeting is best practice. But it's important to understand that some people might be quicker to adopt to a meeting that's unfolding on the spot, while others might find it difficult to attend an unstructured meeting.
 - Ask yourself: do your meetings cater to all types of individuals and their working preferences? Do you clearly set your discussion points vs. decision points? Does each leader include resources provided in advance for everyone to prepare?
- **Speaker selection:** Amplifying the voices of Project Management Professionals is essential to advancing the profession. Sometimes chapters fall into the trap of having the same speakers or same type of speakers for each event. This leads to a lack of thought diversity and experiences being shared. Chapter leaders should practice inclusion during the speaker selection process to ensure different voices and perspectives are heard by chapter stakeholders. This could involve selecting speakers from different genders, ethnicities, cultures, ages/generations, geographies, etc. Researching speakers takes time and effort, but chapter stakeholders will benefit from it. If you're not sure where to start, asking for speaker referrals from other chapters or from PMI Global is a good way to increase the diversity of your speaker pool.
- **Stakeholder engagement:**
 - Inclusion and project input
 - Intersectionality and disaggregating data

- **Scheduling your chapter's meetings:** In an era where chapter volunteers aren't collocating, having a framework in place to support the smooth engagement of a virtual team is crucial.
- **Data Analysis:** The chapter has access to plenty of data, which requires reviewing and analyzing. This task might be delegated to one or two directorates. Considering how to present the data so it's readable ensures the inclusion of those who are numeric friendly and numeric-phobic, alike.

Inclusive leadership embraces various skills, which cover:

- Emotional intelligence
- Multi-cultural awareness/intelligence
- Understanding how to lead inclusive conversations
- Catering to the diverse culture that supports the chapter

The PMI code of ethics is a great first step in understanding the principles that underpin the project profession and our chapters' role in leading by example to distill these principles.

Examples of activities that build adoption include (but aren't limited to):

- Establishing a chapter DEI committee or a DEI ambassador.
- Reviewing your events plan for the year and ensuring it caters to your entire chapter and is attractive to new members; verifying if event speakers or panel participants are diverse and representative of chapter interests.
- Reporting on your chapter's DEI as part of its entire sustainability approach in annual reports and for the Annual General Meeting.

Some examples that are industry specific:

- Construction and design – CPTED
- Finance – customer inclusion
- Tech and software – accessibility and reducing bias
- Social good / not for profit – intersectionality and impact analysis with DEI lens; engaging with your beneficiaries and ensuring seat at the table

As a chapter, don't underestimate the activities you already do, which reflect your journey in the adoption stage. For you to become more inclusive and raise the visibility of the diversity in your chapter, having a clear understanding from stage 2 of where you are and where you want to be, provides you with the strongest foundations.



Adoption score chart

What it includes	Y/N	Points
As chapter leaders, we are putting together a DEI plan for the chapter		6
As chapter leaders, we have identified outcomes for DEI for the chapter		6
As chapter leaders, we are implementing our DEI plan for the chapter		6
As chapter leaders, we are documenting changes being implemented across the chapter		6
As chapter leaders, we would educate ourselves and our volunteers on chapter's DEI plans / projects		6

Total Score (out of 30):

Stage 4: ownership / accountability

Introduction to ownership of DEI at the chapter level

Our chapters are where Project Managers are exposed to PMI, as well as our thinking, values and culture. It's therefore imperative that from the very beginning we clearly exhibit not only our intentions to support the values, culture and ethos of PMI, but also our willingness to hold ourselves accountable and claim ownership of those values.

What does ownership of DEI mean at the chapter level?

DEI isn't about ticking a box for reporting purposes. As we've made clear in previous chapters, DEI at PMI is about creating a genuine sense of belonging for all. And at the chapter level, this means ensuring that we take a proactive stance on DEI. In this way, we can make all Project Managers feel welcome at PMI, improve their knowledge, and elevate careers through the organization, helping us reach our organizational goals.

Professional responsibility

As PMI chapter leaders, we're responsible for submitting our Annual Chapter Survey, and the DEI KPI's as part of it. Annual Chapter Reports need to be submitted during the Annual Charter Renewal Submission, and this needs to include the following aspects:

- Activities that promoted DEI in the chapter during the previous period
- Activities that are planned to promote DEI in the chapter in the coming period
- DEI challenges that were faced in the previous period
- Strategic alliances that will assist growth in the chapter in the coming period

- Other relevant DEI items
- Are we as a chapter proactively seeking to support Diversity, Equity and Inclusion as a PMI strategy and how are we doing this?
- Are we open to accepting constructive criticism?
- Submission of the Chapter Survey (get the formal title of it) which assesses DEI progress and challenges for each chapter.

Chapter accountability

Being accountable isn't always easy. It requires our chapter leaders to remove ego from any equation and take a growth mindset to the environment. Teams that are accountable hold each other to high standards of performance and growth. And at PMI we want to ensure that we're always striving to be the best Project Managers, and drivers of growth possible.

Accountability is about setting goals, sharing knowledge, being able to constructively criticize in a secure environment where unique ideas are recognized and valued, and having a safe place to try new things without fear.

Accountability is important because it not only drives ownership without blame, but it also challenges people to courageously try new things.

Some of the questions our chapters can ask themselves regarding accountability include:

- Do we encourage questions on our strategy and DEI in our chapter?
- Are we encouraging feedback and ideas from our community?
- Are we setting clear expectations for our chapter?
- Are we speaking up and promoting DEI within our community, our organizations and our broader environments?
- Are we holding our leaders accountable?
- Are we practicing self-awareness?
- Are we sincere in our actions and intent?
- Are we willing to learn?



Ownership and accountability score chart

What it includes	Y/N	Points
As chapter leaders, we own the DEI plan, encourage engagement and feedback from its community on DEI matters		8
As chapter leaders, we have a clear strategy and expectations for DEI initiatives		8
As chapter leaders, we are practicing self-awareness and are willing to learn		8
As chapter leaders, we are accountable for outcomes of our DEI strategy and initiatives		8
As chapter leaders, we are actions and intent		8

Total Score (out of 40):

DEI adoption scorecard

Complete the DEI scorecard

Collect your scores from each section of the playbook and compile them here in the final scorecard. This final scorecard represents a holistic assessment of your chapter's DEI efforts across all stages; awareness, understanding, adoption and ownership and accountability. By tallying the points, you will receive an overall DEI score for your chapter. This score provides valuable insight into your chapter's current DEI status and helps guide future actions. Use it as a tool to reflect on your chapter's progress, celebrate achievements and identify areas for growth, ensuring your DEI initiatives continue to thrive.

Phase	Score
Awareness	
Understanding	
Adoption	
Ownership and accountability	

Total Score (out of 100):

> 0 - 24% - **Starters**

> 25 - 49% - **Explorers**

> 50 - 74% - **Implementers**

> 75 - 100% - **Active adopters**

September 2024

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A guide for PMI® Practitioners



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Purpose of PMI® practitioner DEI playbook

The **PMI® Practitioner Diversity, Equity, and Inclusion (DEI) Playbook** aims to support any professional in the Project Management field, regardless of title, background, or industry. Given the diversity of thought and lived experiences our profession represents, this document is underscored by the belief that we all belong in the field. This playbook provides an introductory framework for Project Professionals seeking to understand and improve their adoption of diversity, equity, and inclusion.

You, your teams, your projects, and your collective impact all matter.

Before diving into this topic, we must acknowledge the following points:

- **DEI is an ongoing journey:** Understanding DEI is not a one-time event, but an ongoing process based on the many contexts and cultures we're immersed in. It requires continuous effort, learning, and improvement.
- **Address unconscious bias:** Recognize that everyone possesses unconscious biases and addressing them openly and honestly is essential. Regularly examine personal and organizational biases to create a more inclusive environment.
- **Empower employee voices:** Encourage employees to participate actively in the DEI process. Their insights and experiences are invaluable for driving meaningful change.
- **Measure and celebrate progress:** Set clear goals and metrics to track progress, celebrate achievements, and identify areas for improvement. Recognize and celebrate successes along the way.
- **Embrace intersectionality:** Acknowledge that individuals have multiple identities that intersect and influence their experiences. Consider the unique challenges faced by those with overlapping marginalized identities.

The DEI project practitioner playbook defines 4 phases:

1. Awareness
2. Understanding
3. Adoption
4. Ownership

In the following sections, we'll explain each phase, give recommendations, and advise on some metrics. To increase reflection and understanding, each section closes with an ongoing case study following "Steph", a Project Manager, in her DEI journey. Each section will end with 3 questions to reflect on.

DEI doesn't come out of the blue for PMI. We've interwoven threads of diversity, equity, and inclusion throughout our culture and strategy for years. And the 2022 PMI Global Megatrends Report already identified DEI as one of the six megatrends that will have a significant impact on the Project Management profession in years to come.

Finally, according to the PMI Code of Ethics and Professional Responsibility, several of our values and principles already support DEI:

- **Responsibility:** Project Managers are responsible for creating a fair environment and ensuring that all team members are treated with respect and dignity, regardless of their differences.
- **Respect:** Project Managers should treat all team members respectfully, regardless of background, race, ethnicity, gender, sexual orientation, disability, or other personal characteristics.
- **Fairness:** Project Managers should make decisions fairly and impartially, without bias or discrimination.
- **Honesty:** Project Managers should be honest and transparent in dealing with team members, clients, and other stakeholders.
- **Integrity:** Project Managers should act with integrity in all their dealings with team members, clients, and other stakeholders. This includes being honest and transparent, even when it's difficult.
- **Professionalism:** Project Managers should always conduct themselves professionally. This includes respecting everyone involved in a project, regardless of their background or identity.
- **Continuous improvement:** Project Managers should strive to improve their skills and knowledge, as well as the skills and knowledge of their team members. This includes learning about DEI and how to create more inclusive workplaces.

Based on these values and principles, reinforced in the PMBOK® Guide Seventh Edition, the PMI Code of Ethics and Professional Responsibility can be interpreted as recommending that Project Managers:

- Encourage diversity in project teams, including recruiting and hiring people from various backgrounds and experiences.
- Create an inclusive work environment by creating a space where everyone feels respected and valued.
- Be aware of unconscious bias, particularly those which may lead to unfair treatment of others. Project Managers should be mindful of their own biases and take steps to mitigate them.
- Promote DEI awareness and education to create a more DEI-inclusive workplace by educating team members about DEI and the importance of creating an inclusive environment.

Here are some specific actions that Project Managers can take to promote DEI on their projects:

- Include DEI goals in the project charter to ensure DEI is a priority from the project's start.
- Create opportunities for team members to share their perspectives and experiences through team meetings, workshops, or other forums.
- Provide training on DEI for all team members on topics including unconscious bias, microaggressions, and inclusive communication.
- Celebrate diversity and inclusion within the project by recognizing team members' contributions, celebrating cultural holidays, or hosting DEI-themed events.

Project Managers can create more DEI-inclusive projects that benefit everyone involved by taking these steps. It is important to note that DEI is about more than just creating a workplace where everyone is treated equally. It's also about creating a workplace where everyone feels valued and respected to further contribute to the future successes of our work and field. Project Managers can play a crucial role in creating more DEI-inclusive projects by being mindful of our values and by promoting diversity, equality, and inclusion in their projects.

Phase 1: awareness

Awareness is the first stage towards achieving diversity, equity, and inclusion or DEI. During this stage, a Project Manager unpacks what DEI is, its types, and how it can support projects and organizations. If you're not aware of DEI as a practitioner, you may hurt team members and not understand some of their behaviors, thereby impacting team harmony. As a result, you may not demonstrate empathy when someone talks to you about an issue around DEI.

Before rolling out any DEI initiative, please be aware of the following key concepts and terminology:

- **Diversity** - the practice or quality of including or involving people from a range of different social and ethnic backgrounds and of different abilities, ages, [gender](#), [sexual orientation](#), etc.[\[1\]](#)
- **Equity** - the practice of advancing fair treatment for all people so that norms, procedures, and policies ensure identity is not predictive of opportunities or outcomes. [\[2\]](#)
- **Inclusion** - The practice or policy of providing equal access to opportunities and resources for people who might otherwise be excluded or marginalized.

There are other variations of DEI in acronyms such as JEDI (Justice, Equity, Diversity, and Inclusion) and IDEA (Inclusion, Diversity, Equity, and Access).

A final concept of interest is belonging, which is a sense of security and support by feeling accepted, included, and seen within a project team and organization when bringing one's authentic self to the role. Belonging is a critical outcome of DEI.

Benefits of the awareness stage:

It is essential for consolidating literature and perspectives to disseminate during later phases of this journey. Participation in the awareness stage helps identify the data that needs to be collected and analyzed to establish DEI baselines for metrics such as hiring, promotion, retention, and employee satisfaction rates. These baselines inform DEI target-setting.

Recommendations:

DEI is a journey and not a project with an end date. It's pivotal to continue creating awareness around it so that practitioners—like you— can understand and adopt it in your ways of working. Below are recommendations to enhance awareness:

- DEI values must be aligned and integrated with an organization's core values and vision.
- DEI solutions are to deal with the complexities of people and perspectives. It requires an iterative approach toward creating allies, mentors, and advocates who can model and enable sustainable changes to culture and behavior.
- Approach DEI awareness with a learning mindset. Design a program that translates DEI awareness into practical examples.
- Avoid vague cliches, such as "include everyone in the discussion". and create specific consciousness, such as "intentionally encouraging employees to offer their opinions and express constructive disagreement."
- Tailor DEI communication to avoid replicating the identified gaps between where the organization is today and where it's headed.

Metrics:

DEI metrics empower organizations to better understand and operationalize their challenges in creating awareness, hold leaders and other stakeholders responsible for making progress, and experiment with targeted interventions. A few examples include:

- **Surveys:** Conducting surveys that specifically ask questions related to DEI can provide valuable insights into awareness levels by gauging respondents' understanding and awareness of these concepts.
- **Pre- and post-assessments:** This can help measure changes in awareness. Pre-assessments capture the baseline level of understanding, while post-assessments measure changes in awareness after the intervention.
- **Focus groups and interviews:** This can provide qualitative data on an individual's awareness of DEI topics. Open-ended questions can encourage participants to share their perspectives, experiences, and insights on DEI awareness, including their understanding of diversity, equity, inclusion, and any challenges they may face.
- **Organizational metrics:** Organizations can also measure DEI awareness through metrics, such as diversity representation at various levels, pay equity, promotion rates, employee satisfaction and engagement scores, and retention rates.

Using a combination of quantitative and qualitative methods provides a more comprehensive understanding of DEI awareness.



Case study – awareness phase

Steph has been a Project Manager for three years and just started a new assignment in a middle-sized company, ABC. She inherited a project team of 5 people, all diverse in age and academic backgrounds. Her manager, Joe, has 20 years of experience. An influential stakeholder, Melissa, recently requested that ABC set up DEI policies. Steph asked Joe what DEI was because she didn't have any clue. Joe gave her a vague answer and sent her a link, where some information was provided. However, there were still many things she didn't understand. She opened up about this at her next meeting with Joe. "It seems to be quite a difficult field," she told him. Joe responded "Well, this is just a fashion. Don't invest too much time on it".

What should Steph do?

3 reflection questions:

- What is the acronym used in your organization for DEI?
- What are the DEI policies in your organization?
- How familiar are you and your team members with DEI?

Phase 2: understanding

During the **understanding** phase, individuals and groups aim to deepen their knowledge and awareness of the concepts, principles, and best practices related to DEI. The primary objective is to foster a comprehensive understanding of the challenges and opportunities associated with creating a more diverse, equitable, and inclusive environment.

Ultimately, the understanding phase sets the stage for the rest of the DEI implementation journey. It lays the groundwork for creating a culture of inclusion and equity by fostering knowledge, awareness, and empathy. As people gain a deeper understanding of DEI, they become better equipped to develop effective strategies and policies that promote DEI throughout the organization, community, or project in later phases.

The understanding phase involves three key components:

- 1. Knowledge acquisition:** In this stage, project practitioners seek to acquire knowledge about the significance of DEI in various contexts. This can be achieved through multiple pathways, such as engaging in research, attending training sessions, workshops, or seminars, and learning from the experiences and perspectives of others through open dialogue and sharing personal stories. By gaining foundational knowledge, individuals, teams, and organizations can build a common language and understanding of DEI concepts.
- 2. Awareness reinforcement:** A crucial aspect of the understanding phase is reinforcing awareness of existing disparities, biases, and systemic barriers that marginalized groups face. This includes addressing historical or current societal inequalities and considering the impact of unconscious biases or discriminatory practices. Through increased awareness, individuals can begin to challenge their preconceptions and better understand the need for developing DEI initiatives in later stages.
- 3. Empathy and perspective-taking:** Developing empathy and engaging in perspective-taking exercises are essential to this understanding phase. By putting ourselves in the shoes of others, we can gain a deeper understanding of the lived experiences, challenges, and unique perspectives of different groups. Empathy is a powerful tool that fosters stronger connections and creates a sense of shared responsibility in driving meaningful change.

Benefits of the understanding phase:

- **Informed decision-making:** Increased knowledge and awareness empower organizations and individuals to make informed decisions that promote DEI. Understanding the complexities of diversity-related challenges allows for more effective and tailored intervention strategies.
- **Cultural transformation:** The understanding phase creates a cultural shift within organizations, communities, and projects, where diversity and inclusion become ingrained values. This transformation leads to a more welcoming and supportive environment for all members.
- **Reduced bias:** Heightened awareness of unconscious biases helps individuals recognize and challenge their prejudices. It can lead to a reduction in discriminatory behaviors and attitudes, fostering a more inclusive environment.
- **More substantial commitment:** Individuals and organizations that demonstrate a more profound commitment to DEI initiatives are also able to integrate and adjust broader Project Management plans, including their stakeholder or communication plans, with DEI embedded practices or requirements. This commitment sets the stage for sustained efforts in later phases of implementation.
- **Collaboration and engagement:** As individuals gain a deeper understanding of diversity, they become more willing to collaborate with diverse colleagues and engage in open discussions about inclusion and equity.
- **Empowered advocacy:** The understanding phase empowers individuals to become advocates for diversity and inclusion. Armed with knowledge, they can champion equitable practices and policies within their organizations or communities.

- **Increased participation:** The understanding phase encourages active participation in diversity and inclusion initiatives by focusing on knowledge acquisition and awareness building. More people engage in efforts to promote diversity within their respective spheres of influence.

The understanding phase serves as a critical step for DEI implementation. It fosters the development of a shared language and awareness that underpins the commitment to diversity and inclusion, leading to transformative change in organizations, communities, and projects. Furthermore, project professionals have the opportunity to understand not just the context and culture of their team and organization, but also the society that their work is set in.

Best practices:

- **Foster a culture of learning:** Encourage a culture where individuals are open to learning and motivated to expand their understanding of DEI. Provide access to resources, workshops, and training sessions that promote continuous learning and self-improvement.
- **Engage in inclusive training:** Offer comprehensive training programs that address unconscious biases, microaggressions, and other forms of discrimination. These trainings should be interactive and provide practical tools for fostering an inclusive environment. Examples of potential training formats include role-plays, simulation, think-pair-share discussions, or gallery walks.
- **Promote inclusive language:** Use inclusive language in all communications, policies, and materials. It demonstrates a commitment to inclusivity and respect for all individuals.
- **Seek diverse perspectives:** Encourage dialogue and exchange of perspectives among employees from diverse backgrounds. It can be achieved through group discussions, focus groups, or employee resource groups.
- **Analyze data and metrics:** Use data to identify areas of improvement and track progress. Regularly assess representation, employee engagement, and satisfaction to measure the impact of DEI efforts.

Recommendations:

- **Customize learning approaches:** Tailor learning experiences to meet the unique needs or preferences of your organization and workforce. Different people may respond better to various learning formats, such as workshops, webinars, one-on-one coaching, or self-paced online modules.
- **Collaborate with external experts:** Engage with diversity and inclusion consultants or experts to gain additional insights and best practices. These professionals can provide valuable guidance in developing effective strategies.
- **Encourage leadership support:** Ensure leadership actively supports and participates in the understanding phase. When leaders demonstrate a commitment to DEI, it sets a positive example for the rest of the organization.
- **Create safe spaces for dialogue:** Establish safe and respectful spaces where employees can share their experiences, concerns, and perspectives without fear of judgment or retaliation. Encourage open and honest conversations about DEI topics.
- **Integrate DEI in organizational values:** Incorporate DEI principles into the core values and mission of the organization. It signals a long-term commitment and reinforces the importance of DEI at all levels.

By following these best practices and recommendations, organizations lay a strong foundation for successful DEI implementation. The understanding phase sets the stage for meaningful change and establishes a framework for promoting a more inclusive and equitable workplace or community.

Metrics:

The understanding phase is crucial for building a solid foundation of knowledge around DEI. To measure the success of this phase, organizations, communities, and projects can use specific metrics to assess the level of knowledge gained and the effectiveness of their efforts:

- **Training participation rates:** Measure the number of individuals participating in DEI training sessions, workshops, and other learning opportunities during the understanding phase. This metric helps gauge interest and engagement in the learning process.
- **Training feedback and evaluation:** Collect feedback from participants after DEI training to assess its efficacy. Use surveys or focus groups to gather insights on the quality of the training, the relevance of the content, and the impact it has on participants' understanding of DEI concepts.
- **Knowledge assessments:** Administer pre-and post-training assessments to gauge the increase in knowledge and awareness about DEI. This can be done through quizzes, tests, or other evaluation methods.
- **Employee surveys:** Conduct anonymous surveys to understand employees' perceptions of the organization's commitment to DEI and their understanding of related concepts. Include questions that assess awareness of diversity- related challenges, the importance of inclusion in the workplace, and perceptions of belonging.
- **Inclusive language usage:** Monitor and track the use of inclusive language in internal communications, policies, and official documents. This can help evaluate the integration of DEI principles into everyday practices.

- **Employee resource group engagement (ERG):** Evaluate the level of engagement and participation in ERGs, as these groups often play a significant role in promoting understanding and advocacy for DEI.
- **Feedback and dialogue:** Encourage open feedback and dialogue on DEI topics among employees. Assess the quality and depth of conversations to determine if a safe and inclusive discussion environment has been established.
- **Attendance at DEI events:** Track the attendance and participation in DEI- related events, such as panels, webinars, or guest speaker sessions. Increased participation indicates a growing interest in understanding and promoting diversity and inclusion.
- **Employee turnover rates:** Monitor changes in employee turnover rates in project teams and organizations after the understanding phase. A decrease in turnover among underrepresented groups may indicate improved workplace inclusivity.
- **Organizational commitment:** Measure the organization's commitment to DEI by examining the allocation of resources, budget, and time dedicated to DEI initiatives during the understanding phase.
- **External recognition:** Assess any external recognition or awards received for DEI efforts, as this can demonstrate the organization's progress and reputation in promoting understanding and inclusion.

By continuously tracking these indicators, Project Professionals can make informed decisions, identify areas for improvement, and demonstrate their commitment to fostering an inclusive and equitable environment.



Case study – understanding phase

Steph decided to meet with Melissa, the influential stakeholder who made the initial DEI request. "So, how did you integrate DEI into your project at ABC?", Melissa asked. Steph answered hesitantly, "Well... I've begun looking at it...". Melissa interrupted her, "Just look? You need to do more than have a look. This is important to our stakeholders. I expect you to devise a clear plan at our next follow-up meeting." The next day, Steph looked at the company intranet to enroll in a 3-day training about DEI. During her learning, she discovered issues she hadn't thought about before. For example, she remembered participating in a meeting where her colleague, a woman of color, didn't talk. Steph didn't see any issue and thought she was shy or had nothing to say. But what if she had many things to say and needed a better space to voice her ideas? Steph decided to read a book about this topic to learn and inspire more ideas and strategies.

How should Steph engage her project team to be more informed about DEI?



The following reflection questions encourage individuals to reflect on their learning journey during the understanding phase of DEI implementation. By critically assessing our understanding and considering practical applications, we are more prepared to take proactive steps to drive positive change and contribute to a more inclusive and equitable environment.

3 reflection questions:

- What key insights have you gained from your research or training on DEI? How can you apply this knowledge to create a more inclusive and equitable environment in your organization, community, or project?
- How has your perspective on DEI evolved through word-of-mouth conversations with colleagues, peers, or community members? Have these discussions challenged any preconceived notions or biases you may have held?
- How can you actively use the knowledge you've acquired during the understanding phase to advocate for DEI within your team or community? What actions can you propose to promote a more inclusive culture and support underrepresented groups?

Phase 3: adoption

Adoption is the third stage towards more deeply integrating DEI. By this stage, a Project Professional has undergone a period of learning and awareness building. To this end, the adoption phase describes practicing awareness and understanding to become a more DEI-driven Project Professional.

Benefits of the adoption phase:

Reflecting solely on the business case or financial benefits of diversity can backfire during the implementation process. By adopting DEI policies and practices, a Project Professional develops a stronger sense of belonging by fostering an environment of psychological safety within themselves, their teams, and their organization.

There are additional benefits to working towards the intentional adoption of DEI policy and practice, including:

- Increasing psychological safety leads to improved stability of a project team, more innovation, and stronger project outcomes.
- A more strategic connection between an organization and its social, economic, and political context improves project connection, synergy, and growth opportunities.
- Deeper connections with a wider variety of stakeholders and beneficiaries improves projects, their outcomes, and potential benefits.
- Demonstrating an authentic commitment to improving diversity, equity, inclusion, and belonging improves the scope and depth of our field's impact.

Recommendations:

DEI adoption applies to different spheres of influence a Project Professional has, and tackling different domains simultaneously is possible. A Project Professional should seek to adopt DEI practices using a layered method, with overlapping strategies to improve team adoption, project adoption, and organizational adoption.

Adoption strategies:

Adoption refers to the process of a Project Professional incorporating DEI practice into their own work and leadership style. This is a step beyond simply learning about DEI and its benefits. These adoption strategies include:

- **Journey check:** A critical starting point for a DEI-driven Project Professional is ensuring that they've gone through the awareness and understanding phases of the DEI journey to actualize implementation.
- **Demonstrate emotional intelligence:** This refers to an individual's ability to practice empathy and manage interpersonal relationships. A Project Professional must demonstrate emotional intelligence throughout the adoption phase.
- **Promote cultural intelligence:** This refers to an individual's ability to work effectively in and with diverse cultures. A Project Professional must demonstrate cultural intelligence during the adoption phase, particularly with respect to the local context within which they are located. Project practitioners can take part in training, and also benefit from an intercultural coach or mentor for newer contexts they find themselves in.

- **Set the ground rules and have regular sessions to review them:** Developing inclusive working norms is within a Project Professional's remit and not only the responsibilities of the Human Resource department (HR). Solving for all contexts or issues isn't possible, but demonstrating effort, being mindful, and taking steps towards change shows respect.

Team-adoption strategies:

Team adoption refers to the process of a Project Professional incorporating DEI practice into the teams they lead. These can include:

- **Meeting management:** A vital part of the business world—and the life of a project practitioner—is meetings. And this is an excellent place to infuse, develop, and anchor practices. So, ask yourself, have you considered who is in the room and who is consistently kept out of it?
- **Who is in the room?** Use team and community to get to know each other more intentionally. A typical introduction includes work experience and hobbies, but you can also add questions related to DEI. Introduce yourself with pronouns to set the stage, and add increasingly complex questions like: have you worked with diverse people before? From what perspective were they different, i.e. their identity, background, or industry expertise?
- **Language of the meeting:** Identify which language(s) will be used for your project and teamwork to determine if help is needed in translations. Acknowledge that English is not necessarily the mother tongue of all participants, but communication is still welcome. If there is a wider variety of linguistic needs, consider sending the slides before the meeting or confirming that meeting notes will be digitally sent at the close of the meeting. If necessary, provide accommodations for individuals who are blind, deaf, or hard of hearing, such as transcripts or sign language interpreters.

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- **Collaborative tools:** Use tools that can be accessed and used easily by all people with translations and transcripts available. Consider potential internet issues, such as availability or low bandwidth, or other issues like electricity shortage prior to scheduling online-only meetings.
- **Time zones and temporal constraints:** Be aware of the different time zones your teammates may be in, including differences in working hours and schedule flexibility. Discuss the frequency of the meetings and tools for connection prior to setting a regular meeting cadence.
- **Communication:** Take care of using inclusive language. This is hard work as we sometimes have ingrained non-inclusive expressions in the language, for instance, only using the word “guys” to refer to a group of mixed-gender individuals.
- **One-to-one or team meetings to tackle issues:** Project Professionals cannot just gauge if problems occur. They must be ready to act either 1:1 or in team meetings to tackle issues – particularly related to DEI – to demonstrate that leaders don’t avoid difficult conversations, which further block the team's development during norming, forming, or storming phases. Potential reflection questions can include: “What are we, as a team, doing well to accomplish our shared goals? What are we doing that is keeping us from reaching these goals? What opportunities should we take advantage of that we currently aren't? What would you continue, stop, or start doing if you were in charge?”

Project-adoption strategies:

Project adoption refers to the process of a Project Professional incorporating DEI practices into the projects they lead and their intended outcomes. These can include:

- **Assess project outcomes:** When possible, a Project Professional should know how the results of their project can be made more inclusive and accessible to a broader range of stakeholders. This includes—for example—ensuring accessibility ramps during a construction project, reducing bias in technology or software projects, engaging with beneficiaries to co-create outcomes in social or education projects, and more.
- **Supply chain diversity:** Sourcing from diverse and minority suppliers to encourage broader socio-economic participation in the project improves the lives of individuals far beyond the listed beneficiaries of a project.
- **Improved stakeholder engagement:** Be more innovative in stakeholder outreach and engagement to ensure a more inclusive set of strategies that can be used to gain the attention of more varied stakeholders to give project input.
- **Data-driven decision-making:** Use data to locate project gaps by emphasizing the importance of intersectionality and disaggregating data for inclusive decision-making and more representative project outcomes.

Organization-adoption strategies:

Organization adoption refers to the process of a Project Professional influencing organizations they work in and with to adopt DEI-driven policies or practices. The strategy will depend on the organization's level of maturity and the project professional's power within the institution. Some of these strategies include:

- **Advocate for including DEI norms:** Set norms against bullying or inequitable behavior within your team and advocate for these policies at an organizational level. Norm-building is the first step towards policy-building. If the organization lacks policies supporting or protecting DEI, consider working with other departments or teams to maximize efforts.
- **Capacity-building efforts:** Advocate for training and professional development events to improve DEI understanding, awareness, and adoption at the organizational level. Consider different approaches to DEI that align with the project, industry, cultural, or social context in which you are located.
- **Influencing talent management / hiring policies:** Project Professionals may inherit a project team or hire members directly. When appropriate, you are responsible for considering DEI practices in decision-making. More diverse teams can lead to more innovative project teams, Diverse team selections also improve project participation from historically marginalized or underrepresented groups, which improves the scope of our field.
- **Engage other departments/teams:** Check if other teams in your organization are willing to share lessons learned. Also ask if there is a DEI entity, office, or liaison to engage in norm or policy building.
- **DEI café, forum, stories:** Encourage people to share stories about DEI, drawing anecdotal evidence from around the world. This empowers organizations to develop role models, influencers, and leaders within the Project Management space.

Metrics:

Metrics to measure the extent and efficacy of the adoption phase can include:

- **Personal self-reflection:** Reflect on your DEI journey so far, from the learning you've done to the implementation you've advocated for. For example, ask yourself: How often have I engaged with inclusive training or DEI-driven practices? What have been my biggest moments of growth? What were my biggest obstacles? What are my goals for the upcoming quarter? This qualitative metric will help you gauge your development so far and set intentional objectives.
- **Team focus groups:** When implementing team adoption strategies, conduct a quarterly focus group with your team to gain perspective on team culture, strategy, and adoption. Think about what else your team needs to do to function better and optimize outcomes.
- **Individual check ins:** Connect one-to-one with team members to address the efficacy of DEI adoption. Project team members are among the most important stakeholder groups a Project Professional regularly interacts with and these check-ins provide opportunities for feedback and improvement.
- **Comparison with industry metrics:** Encourage your organization to look at industry norms and DEI metrics to see where your workplace stands. Consider if your organization is already a DEI leader that can serve as a role model for other Project Professionals?



Case study – adoption phase

In the first meeting after her training, Steph told her team about some new practices she learned like: adding pronouns and taking care of the phrases the team uses in their meetings. She also proposed a strategy meeting to review how DEI practices are implemented in the team.

Franz and Jenna, two technical experts, began to question the necessity of additional meetings because they had many project deliverables due in the coming weeks. Steph replied, “How we collaborate is essential to our project and team success”.

The following morning, Steph found an anonymous message on her desk, “Thank you so much for what you’re trying to implement. I was waiting for it for a long time.” Later on, her manager Joe asked her to come to his office and shared, “I got negative feedback following the team meeting yesterday. Our best customer is waiting for the release of the new product. The team is under pressure. Once the product is delivered, you can organize your DEI meetings.”

Steph was puzzled and asked, “Can we try to have at least one meeting to discuss DEI practices in the team? I think some people appreciated it and did not dare to speak up. Also, this is something Melissa wants to see implemented, too.”

Joe looked at her and asked, “Did you not understand what I said?”

What should Steph do?



3 reflection questions:

- What is a consistent challenge you've noticed in your journey to adopt DEI?
- What practices do you typically rely on?
- What is one action you can take to better adopt DEI in your work, either at the individual, team, project, or organizational level?

Phase 4: ownership

Ownership is the fourth phase of the DEI journey. The ownership phase comprises everyone on the team taking responsibility for creating and sustaining an inclusive workplace. Everyone on the team should be aligned on the importance of DEI and what it means to create an inclusive workplace within the culture and context you work in.

Unlike the previous phases, the ownership phase allows Project Professionals to shift the focus of DEI efforts from internal to external. In doing so, the ownership phase describes how a Project Professional can cultivate an ecosystem of DEI linked to their projects and the wider industry or field in which they find themselves embedded.

Benefits of the ownership phase:

In this phase of the DEI journey, project practitioners take a proactive approach toward advocating for addressing gaps in DEI within their organizations, profession, or industries. This allows Project Professionals to go from receiving DEI knowledge to becoming DEI-driven practitioners and advocates. A primary benefit of this phase is that it empowers Project Professionals to give back to the field and support its sustained evolution.

The ownership phase also includes—but is not limited to—the following benefits:

- Supporting other Project Professionals to become more diverse, inclusive, and equitable leaders.
- Advocating for more profound and higher quality integration of DEI within projects, teams, or organizations.
- Assisting others through various stages of the DEI journey, including awareness, understanding, or adoption phases.
- Increasing the scale of DEI-embedded project work in their industries.
- Becoming a DEI leader in the space to advocate proactively and not reactively.

Recommendations:

DEI ownership is demonstrated through a variety of approaches. Most of which mirror the essence of PMI's commitment to "Giving Back". Ownership strategies include:

- Speaking up and speaking out.
- Setting clear goals and objectives. What does the team want to achieve in terms of DEI? Once goals are set, develop a plan to achieve them
- Conducting webinars or presentations on DEI-driven topics within one's industry of specialization.
- Holding brown bag informational sessions with local Project Managers, possibly coordinating with other PMI chapter members.
- Developing resources or toolkit addendums that support others' DEI journeys.
- Adding DEI learning resources to onboarding or orientation initiatives to demonstrate a sustained commitment to these streams.
- Building cross-industry partnerships with local community groups that work with marginalized or disadvantaged groups.
- Advocating for project outcomes that serve wider audiences, communities, and needs.
- Coaching new Project Managers on these new ways of working.
- Codifying documentation of DEI practices within project documents, planning templates, and more.
- Celebrating successes to recognize and reward team members for their contributions to DEI.

Metrics:

Metrics to measure the extent and efficacy of the ownership phase are more fluid and linked to qualitative word-of-mouth measures, including:

- **Personal self-reflection:** Consider ways you can increase contributions to the field and more deeply engender a sense of belonging. As a qualitative self-check, your self-reflection can include questions like: what have been my grows and glows during this journey? How satisfied am I with my personal, team, or organizational impact? Which project(s) am I most proud of? Which project(s) could use a more intentional approach? How frequently do I advocate for DEI approaches or practices in my work now?
- **Elicit formative feedback:** Reach out to teammates or peers in a similar field to request formative feedback on ways you can improve, what their projects or policies look like, potential streams for collaboration, and ways to co-advocate in your field.
- **Speaking engagements:** Participate in arranging, leading, and delivering presentations or webinars on DEI. Invite guest speakers and become one yourself!
- **Recognize other Project Professionals:** DEI journeys are all around us, so reach out to one another and recognize teams for high DEI adoption.
- **Employee satisfaction surveys:** During a DEI journey, gain insights from employees on ways to improve diversity, equity, and inclusion.
- **Exit interviews:** Ask departing employees for their feedback on the company's DEI efforts and ways to improve this work.
- **Representation matters:** Advocate for the inclusion of underrepresented groups in leadership and project positions. Track the number of underrepresented groups represented in leadership positions over time.

- **DEI initiatives:** Consider the number and variety of DEI-focused initiatives launched and implemented by your teams and organizations. Examine how they impact your project outcomes and improve your organization's influence.



Case study – ownership phase

One month after the DEI strategy call, Steph is motivated to implement regular DEI-driven inclusive training, particularly on language inclusion since her team is globally diverse. Her manager, Joe, disagrees with this initiative and calls a meeting with HR to discuss it.

In the meeting, Joe argues that DEI shouldn't take away from valuable time that the team needs in delivering products to their clients. "This DEI stuff is just a politically correct phase – why do we have to continue down this line?"

Steph, aggravated, replies, "DEI is not a phase. It's like the idea of professional communication or ethical practices – it needs to be built into the work we do. In the initial stages while we're on this learning journey, I may ask for an hour here or there to improve team practices. Why is that so wrong if we are getting the work done?"

The HR representative has been quietly observing the heated discussion between Steph and Joe. She calmly enters the conversation. "Joe and Steph, I understand both of your concerns for the client deliverable and for team and personal health. We need to find a compromise because we cannot sacrifice the client for the team or the team for the client. Is there really no middle ground on this?"



After a few moments of reflection, Steph suggests, “If I can get 1 hour every 2 weeks to discuss diversity, equity, and inclusion, while ensuring that the team’s deliverables are not impacted, is that acceptable? This way, I get to ensure DEI is on the agenda at a regular cadence, but that client work is also getting done. This is important for our team- we need to own this as a workplace”.

Disgruntled, Joe says, “Its fine for now, I guess. But I’ll keep a close eye on this!”

The meeting ends and Steph returns to her desk to begin scheduling the DEI calendar blocks.

What would you say if you were present during this meeting?

Final reflection:

In closing, there is no "end-state" to developing DEI-driven competencies. DEI is closely linked to a specific time and place, with particular emphasis placed on cultural, social, economic, and political contexts. To this end, DEI is an ever-evolving language, process, and outcome. Project Professionals who are genuinely committed to integrating diversity, equity, inclusion, and belonging into their practice will recognize that reaching the end of this playbook gives us another opportunity to begin again at the awareness phase as better-informed Project Professionals intentionally seeking to improve our practice, projects, and field, continuously.

What impact do you hope to have through this journey?

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