

Diversity Means *Everyone* — Here are Some Tool Kit Ideas to Get Started

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The CPCU Society's stated mission is to "meet the career development needs of a diverse membership of professionals who have earned the CPCU designation, so that they may serve others in a competent and ethical manner."

All members should take pride in being part of an organization that remains focused on the noble and necessary objective of becoming more diverse. The business case for diversity applies well to the CPCU Society where we need the best and the brightest to assure our ongoing success as a revered professional insurance organization. Despite the trends of the financial services industry in general and, more specifically, the insurance industry, the dedicated members of this Society can make a difference. We simply need the best possible tools to be effective against those trends.

Diversity Tool Kit — What items would you put in the tool kit and why?

1. The goal of the first tool is to build an understanding of why diversity is so important, create a passion for it, and provide a strong incentive to act on that passion. Reading motivational material and how-to papers is good, but I believe on-site training would be most effective. (See the Diversity Training section.)
2. The next set of tools is aimed at finding people who will bring diversity to the Society and connecting with them through community outreach efforts and volunteerism targeting specific populations. Materials must focus on the benefits we offer those individuals; i.e., what's in it for them.
 - Regional diversity experts developed to
 - o conduct diversity training at local chapters
 - o analyze demographics and help establish local objectives
 - o build instructions for using the tools in the tool kit

- o create a contact list of local representatives for national minority organizations (e.g., National African American Insurance Association, Urban League and Urban League Young Professionals, Chamber of Commerce, Hispanic or Asian Chamber of Commerce, National GLBT organization, Rainbow Coalition, Goodwill/Easter Seals, National Conference for Community, etc.)
- o partner with the chapters to coordinate outreach activities

This might be similar to a Sales Executive position with The Institutes or a volunteer position.

- Materials for local chapters to use in presentations, information booths and activities, including slides, hand-outs, banners and give-away items to support
 - o meetings with minority-owned or operated agencies and companies
 - o partnerships with the above agencies on community activities such as Habitat for Humanity® and Rebuilding Together®
 - o career days at primarily minority high schools, colleges and universities
 - o booths at multi-cultural events such as Hispanic or Asian heritage festivals or city festivals
 - o diversity activities in the members' workplace such as Take Your Sons/ Daughters to Work Day or Disability Day where groups come into the office to learn about careers in insurance
 - Advertisements in national and local minority publications related to insurance or financial services
3. A third set of tools must focus on keeping the diverse population engaged in the CPCU Society. If people don't feel included and valued for the unique contribution they bring to the group, they will quickly end the relationship.
- Interest Group tools
 - o Newsletter stories on Society diversity activities emphasizing positive results (company, chapter, IG and Society level)
 - o Articles from diverse authors (use contact lists from the second tool set; focus on what they need from the CPCU Society)
 - o Staff the IG committees using an affirmative action approach to create multicultural work teams

- Chapter tools
 - o Demographic information for meeting locations, speakers and menu options
 - o A list of recommended speakers of diverse cultures or backgrounds
 - o Diversity or cultural sensitivity training at a chapter meeting
 - o A template to facilitate table discussions on diversity
 - o A list of commemorative months or historical events in insurance to be recognized in chapter meetings or newsletters (e.g., Black History Month (February), National Older Americans Month (May), Chinese New Year, Cinco de Mayo, first minority-owned agency or insurance company president)
 - o A mentoring program with guidelines focused on inclusion
 - o A chapter ethics program that includes how values may vary between cultures, thus impacting the perception of ethical behavior
4. Incentives are important tools for motivating members to action. Suggested tools in this fourth category include:
- Circle of Excellence recognition, which is already in place but there could be special recognition for the chapter most active or successful with diversity efforts
 - Local recognition for individual members who succeed in creating diversity at the chapter level (e.g., pay for a meal(s) or membership renewal)
 - Chapter or state level goals to measure progress
 - Recognition for accomplishments by publicizing success stories about chapters gaining in diversity and maintaining a highly diverse membership

Access to the tool kit should, of course, be on the CPCU Society website or with a call or e-mail to Chapter Services. Because the process of building diversity into the CPCU Society begins with building a more diverse student community, the tools should also be available through The Institutes and their website. A package of materials and contact information should also be given to chapter leaders who could share it with high schools, community colleges and other institutions.

Measuring the success of the tool kit will be challenging because some students and members may be hesitant to provide certain demographic information. Although difficult to

capture, it is the ultimate measure of success. Additionally, the Society could track the level of activity by the number of

- total diversity activities
- chapters conducting diversity activities per the Circle of Excellence report
- diversity articles published

Diversity Committee — How should the tool kit be publicized?

The CPCU Society has already employed most of the standard means for publicizing diversity objectives, including the website, e-LINK and Chapter Officer Newsletters, the Circle of Excellence program, and this essay contest. All of these are excellent modes of communication and should continue. For the tool kit, the Diversity Committee may want to consider additional advertising options.

Conferring officers could bring tool kits to local conferments, make the point for diversity to all during their presentation before or after the conferment ceremony, and hold a separate discussion with chapter leaders. Their purpose would be to emphasize the objective, explain the resources available, and help create a vision of diversity for the local chapter. The ultimate goal would be to build a strong desire in those volunteers to invest their time in outreach activities and inclusion efforts.

Interest Group newsletters offer a good opportunity to emphasize not only the availability of the tool kit, but also the value diversity can bring to that group's interest area (agents, claims, management, etc.) for the benefit of both their company and the CPCU Society.

I know the CPCU Society is becoming more 'linked in' to the younger generation through social media. Although I am not an active participant, Facebook, Twitter and LinkedIn provide important communication tools to reach the youth. Messaging about diversity objectives and the tool kit will show them that the Society is serious in our efforts to include them, and will encourage them to use the tools to bring in others just beginning their careers.

Diversity Training for Leadership

I believe diversity training is absolutely essential for effective leadership in the future. It would not only benefit the CPCU Society, but individuals would benefit from this understanding in their personal lives and careers. The training must inspire passion for this objective. Once that passion exists, people will be more willing to make the commitment of time, a most precious asset.

The training content should begin and end with the business case for diversity. It should also explain that diversity is not about just one segment of society. It includes people from

a variety of races, genders, age groups, sexual orientations, cultures, economic conditions, religions, abilities and general experiences or backgrounds.

Once the students of diversity understand it, they then need to become adept at using the tools. Many people are initially uncomfortable when surrounded by people who are different from them: where to begin, what to say, what not to say, etc. Diversity training should include role-playing to help them cope with and overcome that discomfort in a non-threatening environment. Real life situations and success stories will help students understand the benefit that can be achieved and open conversations to share ideas. It will also help them empathize with others in similar situations. A diverse team of trainers would be the optimal setting to exemplify the value and goal.

In Conclusion

Most successful businesses have learned that by including people from diverse backgrounds, they are able to expand, develop innovative ideas, and beat the competition. The CPCU Society must do the same. Other professional organizations in the insurance and financial services sectors are competing with us for high potential individuals. Individuals are looking for relationships that will provide them with opportunities for networking, career support, personal development, and personal satisfaction. The CPCU Society must be able to do that effectively... for everyone.