

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:

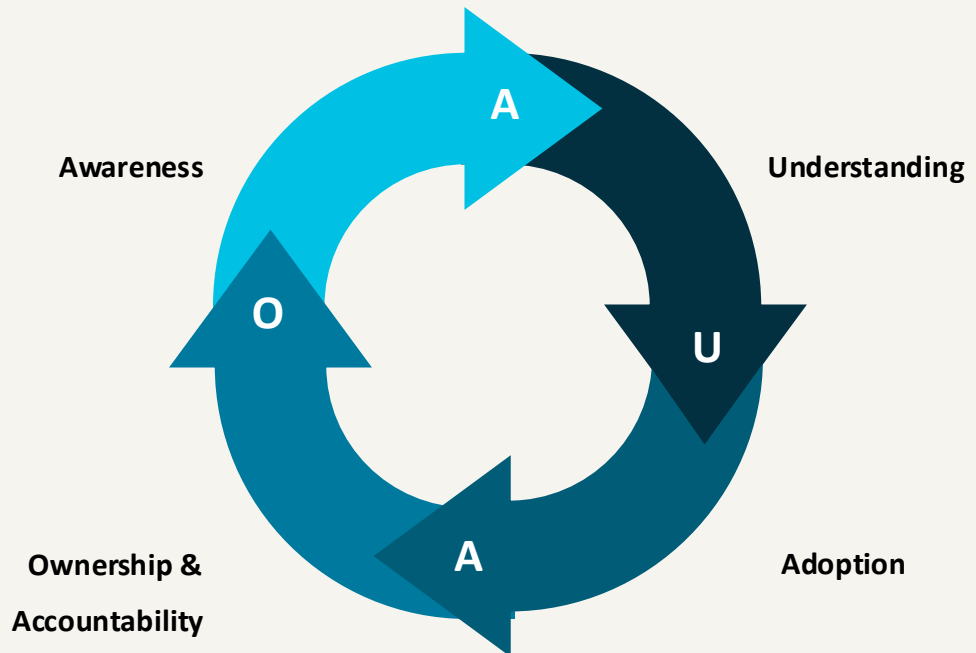


Figure 1: The four stages of a chapter's DEI journey

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**