



Diversity, Equity and Inclusion ROADMAP

*A blueprint for our member banks
of all sizes to launch, refine and
sustain effective DEI efforts.*

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Acknowledgements

DEI Advisory Group

Sharifa Anderson, Esq., *Senior VP, Chief Diversity & Inclusion Officer*, Fannie Mae

Charlotte Bellas, *Senior VP, Learning & Dev. Leader*
First Commonwealth Bank

Brandy Burnham, *President & CEO*
AHEDD/DisabilityIN

Nicole Burrell, *District Manager, Senior VP*
Wells Fargo Bank

Dr. Karen Carmack, *Senior VP & Chief HR Officer*
F&M Trust

Gina Coleman, *Senior VP & Chief Diversity Officer*
The PNC Financial Services Group

Dr. Linda Eagle, *Co-Founder and President*
Global Bankers Institute

Latoya Edmond, *Regional Director*
CareerWork\$

M. Theresa Fosko, *Exec. VP & Director of HR*
Univest Financial Corporation

Dr. Paul David Spradley, *Vice President of DEI*
Dollar Bank

Dr. Bernadette Taylor, *Senior Exec. VP, Chief HR Officer*
Fulton Bank

K. Bernard Tynes, *Exec. VP, Chief Marketing & Impact Officer*
Penn Community Bank

PA Bankers Staff

J. Duncan Campbell III, *President & CEO*

Michelle L. Staton, *Chief Operating Officer*

Karen McDermott, *Senior Director, Membership*

Former DEI Advisory Group Members

Joseph Bower, *President & CEO (retired)*
CNB Bank

William Gonzalez, *Executive VP*
Quaint Oak Bank

Marsha Jones, *Executive VP and Chief Diversity Officer (retired)*
The PNC Financial Services Group

T. Michael Price, *President & CEO*
First Commonwealth Financial Corporation

James Wang, *President & CEO*
Asian Bank

Pilot Banks

Mars Bank

The First National Bank & Trust Co. of Newtown

Table of Contents

	<u>Page</u>
Executive Summary	4
Introduction	6
Overall Process Flow Diagram	7
Phase 1 – Envision	8
Roles	
Outcomes	
Action Steps	
Phase 2 – Plan	12
Roles	
Outcomes	
Action Steps	
Phase 3 – Implement	15
Roles	
Outcomes	
Action Steps	
Phase 4 – Manage	20
Roles	
Outcomes	
Action Steps	
Conclusion	22



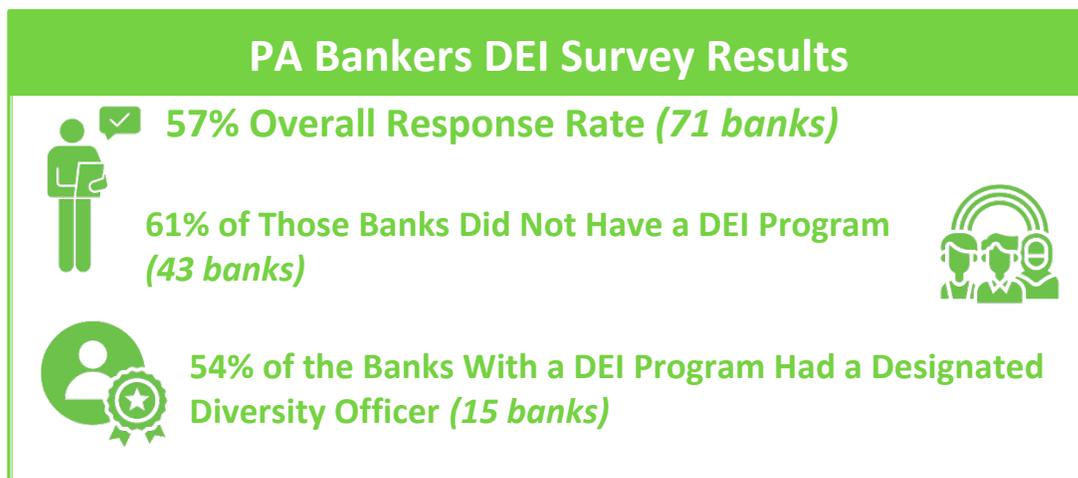
DEI Statement

We promote and encourage a diverse, equitable and inclusive culture that values and supports all voices across our organization. We are committed to expanding access and opportunity and to eliminating barriers. We will promote DEI proficiency to our member banks. We will do this by providing resources to support our members so that they may develop and meet sustainable DEI goals.

Executive Summary

The Pennsylvania Bankers Association is committed to supporting our member banks with their Diversity, Equity and Inclusion (DEI) efforts to include their workforce, customers and the communities they serve. That commitment began with the creation of member resources and the DEI statement in early 2020. Later that same year, a DEI plan was created which outlines the association's efforts in support of our member banks. A DEI Advisory Group was then created to support and advise the board and senior staff on DEI efforts across the association.

The association conducted a member survey in 2021 to assess where our members were in their DEI journey and to inform our efforts moving forward.



The survey further measured how those banks with DEI programs monitor and report their progress; if they use scorecards or systems to measure DEI efforts; and, if they have employee resource groups, ongoing training programs, etc.

The quantitative data gathered from the survey identified several areas that the association could focus on to support member banks with their DEI efforts, but additional information was needed. Therefore, focus groups were held to dig deeper into the data. One key theme throughout all five focus groups was the need for PA Bankers to create a roadmap for our members to assist them with their DEI efforts. The association responded by developing a roadmap for our member banks to use whether they are just starting or leveling up their DEI efforts.

The roadmap, **DEI TRACC – Taking Responsibility and Creating Culture**, is a blueprint for our member banks of all sizes to begin, refine and sustain effective DEI efforts. This guide outlines the various phases involved in establishing long-term sustainable change, including assessing the current state of DEI at your bank and what strategic steps should be taken to create a diverse, equitable and inclusive organization.

Envision

Bank recognizes importance and value of DEI. Creates leadership team and drafts DEI statement.



Implement

The components of the overall DEI initiative are implemented and the culture fosters DEI values and actions.

Plan

Leadership team establishes overall DEI goals and plans the initiative to align with those goals.

Manage

The overall DEI initiative and all components are managed, maintained and assessed to drive current and future goals.

The association worked with two member banks to pilot the roadmap – Mars Bank and First National Bank & Trust Co. of Newtown. The pilot allowed for further refinement of the tool while it was in-practice. PA Bankers thanks both banks and their teams for their involvement, support and partnership. This would not have been possible without them.

PA Bankers would also like to thank Dr. Linda Eagle with the Global Bankers Institute. Dr. Eagle is a long-time supporter of PA Bankers and a member of the DEI Advisory Group. Linda has been instrumental in concept development of the roadmap, as well the pilot phase. PA Bankers is grateful for her support and involvement in this extremely important initiative.

The tool, as outlined on the pages that follow, will provide practical tools and resources. It is scalable based on bank size and resources available.

Introduction

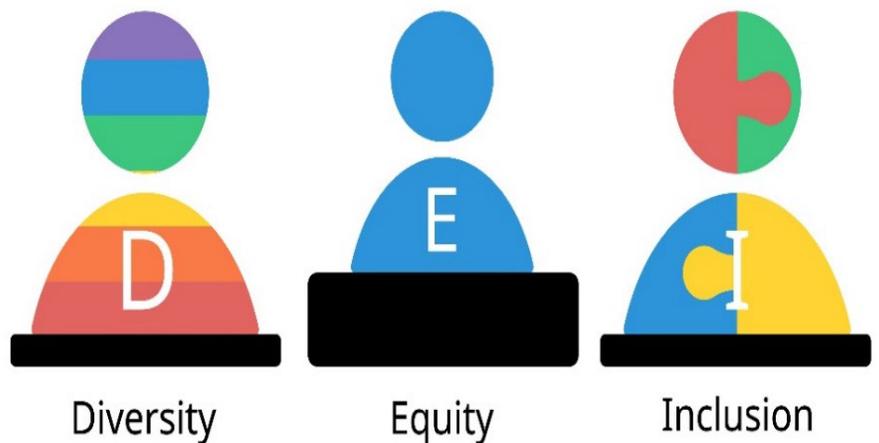
What is Diversity, Equity and Inclusion (DEI)?

Diversity, Equity and Inclusion is an initiative to create and promote fair and welcoming policies to improve representation and participation within an organization.

Diversity – Diversity refers to the many ways people differ and the need to understand, accept and value those differences.

Equity – Equity is about creating fair and just practices, allowing everyone to thrive and ensuring they are treated fairly and have access to opportunity and advancement.

Inclusion – Inclusion is an environment where everyone feels they belong; they feel welcomed and are actively invited to contribute and participate.



DEI TRACC Pilot Bank Insight

“The DEI roadmap provided the tools necessary for our team to start on our DEI journey. We were able to move through the initial phase quickly because of the actionable steps we were given. We are excited to have participated in the pilot and even more excited to continue our DEI journey with help from PA Bankers.”

Dan Schaffer
President & CEO
The First National Bank & Trust Co. of Newtown





1

ENVISION

- Recognize the importance and value of DEI
- Create working definition of DEI, assuring alignment with bank's mission, vision and values
- Establish DEI leadership team
- Hold first DEI leadership team meeting
- Create a DEI statement
- Assess current state of your bank in areas of DEI (*employee surveys or focus groups and self-assessments*)
- Assemble DEI Council
- DEI Council kick-off meeting is held
- Baseline DEI training is held for DEI Council members



2

PLAN

- Leadership team establishes overall DEI goals for the bank
- Leadership team creates an identity and process around DEI
- Review board member representation to ensure board reflects the culture you are creating
- Design a communications strategy to communicate DEI effort across the organization as well as externally.
- Establish a DEI calendar for all leadership team and DEI Council meetings



3

IMPLEMENT

- Employee information-sharing sessions are scheduled with DEI leadership team
- DEI training program is implemented for new and existing employees
- DEI metrics and target outcomes are established
- Recruitment, promotion, retention, succession, mentorship and leadership development practices should be reviewed
- Create Employee Resource Groups (ERGs)
- Create/Review Supplier Diversity policy
- Review community demographics and products/services



4

MANAGE

- Conduct regularly scheduled meetings with DEI council to solicit input and assess progress of DEI initiative
- Use metrics established previously to measure impact
- Identify any barriers to achieving DEI mission and goals
- Establish standard communication vehicles for feedback and input, as well as to share progress and opportunities for improvement
- Identify learning points from all efforts within the DEI initiative, document them, and share with stakeholders
- Celebrate change in creative ways



Phase 1 - Envision



In the first phase of **DEI TRACC - Envision**, the bank recognizes the importance and value of DEI, as well as creates its DEI statement. A major component of the first phase is getting the leadership team in place to lead the DEI initiative moving forward. **The anticipated timeframe for this phase is three to six months.**

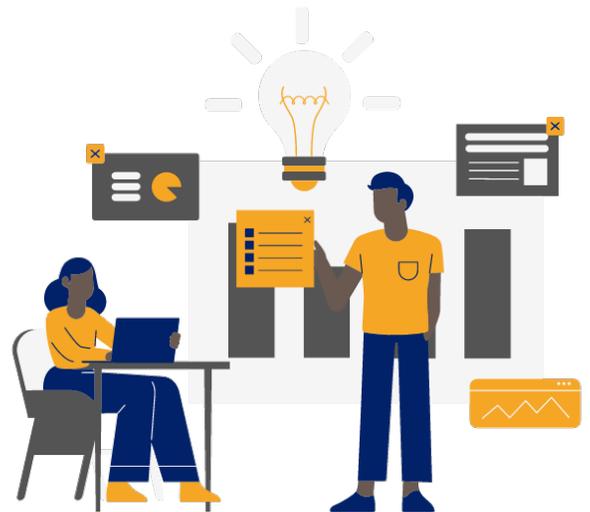
Roles

President/CEO – Sets the tone from the top for DEI.

Executive Leadership - Executive leadership commits to the initiative and drives the effort moving forward. Their involvement and leadership are critical to the success of the DEI initiative. They need to be visible and openly supportive of the initiative and should have the DEI officer report directly to the C-suite (if applicable).

Board of Directors - The board of directors endorses the initiative.

Human Resources - Human Resources leadership usually supports the effort with representatives from other areas to participate and shape the initiative.



Outcomes

- ✓ DEI Statement Created
- ✓ DEI Leadership Team and DEI Council Established
- ✓ Focus Group Results
- ✓ Baseline Assessment Completed
- ✓ Baseline DEI Training Held for DEI Council

DEI Advisory Group Member Spotlight

“I have found that DEI is not a destination, but a journey – and a practice. This guide contains actionable steps that a bank can follow to implement a successful DEI program. It is useful for banks just starting out, as well as banks who are further along in their DEI journey.”

K. Bernard Tynes
Executive Vice President, Chief Marketing & Impact Officer
Penn Community Bank



Action Steps

-  **Recognize the importance and value of DEI.** Executive leadership establishes high-level goals and demonstrates their commitment to the DEI initiative. The board of directors strongly endorses leadership's commitment.
-  **Create a working definition of DEI, ensuring alignment with the bank's mission, vision and values.**
-  **Establish a DEI leadership team** by intentionally selecting senior leaders from across the bank that have decision-making ability and can lead the effort moving forward. Their role is to support DEI efforts, be accountable, embed inclusive practices, and be active and prominent advocates for DEI practices and leadership. This team could be chaired by someone who has responsibility for oversight of DEI at the bank (chief diversity officer, chief HR officer, chief executive officer, etc.).
- 
-  **Hold first DEI leadership team meeting** to discuss the formation of a DEI council and establish the process for populating the council (volunteers, nominations, etc.)
-  **Create the DEI statement for the bank.** DEI statements should clearly outline the bank's commitment to DEI and be easy to understand and repeat. It is recommended that you share the DEI statement with the board of directors for its awareness, review and buy-in/endorsement.
-  **Assess the current state of your bank in the areas of DEI.** This can be accomplished using one-on-one and group discussions, focus groups, engagement surveys and review of existing initiatives that contain components of DEI. During the initial assessment, it would be beneficial to consider culture as well. A review of demographic data may be useful to include race, gender/gender identity, age, sexual orientation, veteran status, religious affiliation, etc. Another component of the assessment process would include looking at retention rates, promotion rates, etc. to align with the some of the demographic data collected, as well as employee grievances filed or any negative customer reviews on record. This is just a baseline assessment, as it is key to assess throughout the DEI journey and not just at the beginning.
- **Employee survey or focus groups** – If you are interested in doing focus groups or an employee survey to get a baseline on your employees' perceptions of your bank's DEI efforts and their understanding of DEI, sample questions could include:
 - When you joined the bank, did you feel like you belonged? Did the bank do anything specific to make you feel welcomed? Do you have suggestions for making new and existing employees feel they belong? Do you think everyone in our bank has the opportunity to grow into a leadership position?

- How do you think customers feel about your bank? How do you make them feel welcomed and valued?
- What could the bank do to ensure the products we offer appeal to customers of different ages, ethnicities and cultural backgrounds?
- What training and resources would you like to see the bank offer on diversity, equity and inclusion?

Consider establishing ground rules to ensure an honest, open and safe conversation.

- **Self-Assessment** - An organization-wide self-assessment will help the leadership team better understand what the maturity level of the bank's DEI journey in the following areas:

- Mission, values and goals for the bank
- Policies, procedures and staffing
- Building workplace culture
- Customer service delivery
- Engagement in the community

There are a few ways the leadership team can assess where the bank is with DEI in the areas outlined above. Here are two examples of tools that can be used:

- **Sample checklist** can be found [here](#).
- **Sample self-assessment** can be found [here](#).



Assemble the DEI Council, including establishing the charter, criteria and process for meetings/work moving forward (priorities, standards for participation, responsibilities, etc.). There are two options in forming the council – you can select individuals or solicit volunteers to serve on the council. The DEI Council should consist of junior to mid-level employees with different backgrounds, genders, tenures, sexual orientations, physical abilities, ages, social status, etc. Consider opportunities to recognize council members for their efforts and commitment to advancing DEI at the bank.

The role of the DEI Council is to share their insights and perceptions of what it personally means to work at the bank, how they view the progress of current initiatives, provide input on DEI projects, and increase awareness of DEI initiatives throughout the bank. The views and experiences of council members will be different from those in leadership roles, and their insight will be important to the DEI initiative.

The council's role is not to make decisions on or lead DEI programs or initiatives. That responsibility lies with the DEI leadership team. The DEI Council will brainstorm ideas and as a group decide which ideas are presented to the leadership team for further consideration. The leadership team will evaluate ideas that are submitted by the council and decide what will be implemented and who will implement them.



DEI Council kick-off meeting is held to brainstorm ideas and ensure all areas of the bank are represented. Council members will discuss communication content, delivery method and timing of messages.



Baseline DEI training is held for all DEI Council members. Potential content ideas and outline for training can be found [here](#). Additional DEI-related training can be found on the PA Bankers website. Click [here](#) to access the **DEI Resources section of the website**.

DEI Advisory Group Member Spotlight

“It has been an honor to have been a member of the DEI Advisory Group since its formation in 2020, and I am very excited to be able to bring the roadmap to fruition. DEI TRACC is a tool for banks of all sizes to use as they navigate their DEI journeys.”

Sharifa Anderson, Esq.
Senior Vice President, Chief Diversity & Inclusion Officer
Fannie Mae





Phase 2- Plan



In the second phase of **DEI TRACC - Plan**, the DEI leadership team establishes the bank’s overall DEI goals and plans the DEI initiative, including considering and assessing recommendations made by the DEI Council, based on its alignment with the bank’s mission, as well as feasibility, budget and value. **The anticipated timeframe for this phase is six months.**

Roles

DEI Leadership Team – Spearheads the DEI effort

DEI Council – Supports leadership efforts

Executive Leadership – Approves the plan



Outcomes

- ✓ Preliminary DEI Goals Established
- ✓ DEI Calendar Created – Leadership and Council Meetings
- ✓ Board Representation Reviewed
- ✓ Communications Strategy Developed

DEI TRACC Pilot Bank Insight

“Participating in the pilot allowed Mars Bank to shape this effort moving forward for all PA Bankers member banks. The roadmap lays things out in a way that our team can take the steps necessary to implement a sustainable DEI effort, which is not something we could have easily done on our own.”

James Dionise
President & CEO
Mars Bank



Action Steps



The leadership team establishes the overall DEI goals for the bank. Goals can be at a high level, such as improved inclusivity, increased diversity and focus on equity; or they can be more specific. In either case, goals need to be well-defined and widely communicated throughout the bank. Any progress made achieving the bank's DEI goals should be communicated as well. The communication aspect is important to increase employee engagement and understanding of the bank's DEI efforts.

Suggested goals include:

- **Improve awareness of DEI issues and promote inclusivity in the workplace.** This could be accomplished through a bank-wide briefing or smaller meetings with managers and their teams within the bank to increase awareness of DEI issues, perceived bias and prejudices that underrepresented employees may face. It is also important during this time to communicate the bank's DEI goals.
- **Start employee resource groups (ERG)** as a way to build inclusive cultures and support employee development. ERGs bring together employees who share an affinity, which creates a connection regardless of where they work at the bank.
- **Start a mentor program for diverse employees** by matching leaders from across the organization with underrepresented employees to chart a career path and accelerate advancement. Depending on what the bank's goals are for the program, employees being mentored could be paired with leaders who have similar backgrounds or with leaders who have different backgrounds. Mentors with similar backgrounds would support the bank's ERGs and help build a sense of community. Mentors that have different backgrounds could offer diverse perspectives to the mentee.
- **Create a bank-wide DEI continuous learning program** to increase awareness and inclusivity.
- **Develop and execute strategies to recruit talent with diverse backgrounds.**
- **Create a supplier diversity program** to drive inclusion of diverse-owned businesses into the procurement efforts within the bank. Creating a more diverse supply chain that values diverse-owned businesses brings new perspectives and capabilities.



One approach to consider when initially establishing goals is to start with two to three that will have the most impact and then go from there. A [sample planning and progress sheet](#) to track your bank's goals can be found [here](#).

 **The leadership team creates an identity and process around DEI.** Consideration should be given to creating an identity and process around the existence and importance of DEI at the bank. This effort may include the creation of materials posted on the company's intranet, a video message expressing council members' feelings about DEI, and similar efforts designed to inform and engage employees throughout the bank. The goal is to generate awareness of the goals established by the bank, as well as solidify the bank's commitment to DEI. [Sample materials for a DEI packet](#) can be found [here](#).

 **Review board member representation to ensure the board reflects the culture you are creating – your staff and the community you serve.** Part of the review should include the identification of any opportunities to attract new board members when existing board members' terms expire.

 **Design a communications strategy to communicate the DEI effort across the organization as well as externally.** The strategy should outline communication with employees about progress (frequency and method to be used), as well as keeping the board of directors informed. It is important to communicate externally about the bank's DEI efforts, as this can assist with recruiting diverse talent and creating community partnerships.

 **Establish a DEI calendar for all leadership team and DEI Council meetings.** The calendar should include events and deliverables as well so that the entire effort is mapped out. A detailed calendar will help manage expectations and ensure the initiative moves forward at an agreed upon pace.



DEI Advisory Group Member Spotlight

"I am excited to see DEI TRACC being used by member banks statewide. Launching the effort is just the beginning, as the DEI Advisory Group will be engaging with banks on an ongoing basis to learn how the guide works in-practice and make updates as needed moving forward."

Dr. Bernadette Taylor
Senior Executive Vice President, Chief HR Officer
Fulton Bank





Phase 3 - Implement



In the third phase of **DEI TRACC - Implement**, components of the overall DEI initiative are implemented, and the culture fosters DEI values and actions. This phase also allows for open communication with employees and measurement of goal achievement. **The anticipated timeframe for this phase is 12 months.**

Roles

DEI Leadership Team – Integrates and promotes DEI efforts

Human Resources and/or Training and Development – Reviews recruitment, promotion, succession, mentorship and leadership development practices, as well as oversee DEI training efforts

DEI Council – Supports leadership efforts in implementing DEI initiatives

Outcomes

- ✓ Information Sessions
- ✓ DEI Training
- ✓ DEI Metrics and Target Outcomes
- ✓ HR Practices Reviewed
- ✓ Employee Resource Groups Established
- ✓ Supplier Diversity Policy Review/Created
- ✓ Community Demographics and Products/Services Reviewed



Action Steps



Employee information-sharing sessions are scheduled with DEI leadership team. These sessions should be held in small groups and be a safe space for everyone to have open and honest communication.



DEI training program is implemented for new and existing employees. Initial DEI training should be scheduled for all employees and include general DEI-related topics such as DEI basics/terminology, unconscious bias, conscious bias, etc. Future DEI training should be ongoing for everyone, with new employees receiving general DEI-related training during the onboarding or orientation process.



DEI metrics and target outcomes are established to continually monitor your bank’s DEI efforts. These should include diversity of the board and staff (% within the bank and % in leadership, promotion rates and retention rates), DEI training, employee engagement (surveys, ERGs, mentorships, etc.), and supplier/vendor diversity. A **sample scorecard** can be found [here](#). There should be a plan in place to report to the board on a regular basis on DEI metrics and outcomes.



Recruitment, promotion, succession, mentorship and leadership development practices should be reviewed to ensure the organization is attractive to diverse communities considering employment and that opportunities exist for career development and upward mobility for all. The process will also identify barriers to recruitment, promotion and retention efforts.

- **Hiring Practices** – The initial impression a potential candidate has about an organization is through a job posting or job description. A complete review is recommended of job descriptions with a DEI lens to ensure they are more inclusive. This includes addressing gender coding, understanding age and experience bias, cultural and racial bias, and ensuring inclusion of candidates with disabilities.

A second consideration should be where the job opportunities are posted and where talent is being recruited. The bank should diversify where applicants are sourced from and establish partnerships with diverse talent organizations to increase the talent pool.



Additionally, the organization may want to focus on ensuring any bias is mitigated throughout the interview process. For example, the hiring manager may ensure that candidates are interviewed by a diverse group of interviewers or that questions are standardized to ensure consistency across candidates.

The organization should share its DEI statement in the job posting as well as provide more information about the initiative during the interview process.

DEI Advisory Group Member Spotlight

“DEI TRACC is a tremendous resource for banks of all sizes to guide them through the process. It would have been so helpful if we had this tool before we started our DEI journey.”

Theresa Fosko
Executive Vice President & Director of HR
Univest Financial Corporation



- **Retention/Career Pathways/Leadership Development** – Having a clearly defined career pathway strategy that demonstrates the ability for anyone to progress from an entry-level position to middle management and/or senior leadership shows commitment to inclusivity for all. It is also recommended that you establish pay equity guidelines that include compensation equity, paid time off and other benefits to ensure implicit bias in compensation practices does not occur. Being able to demonstrate a commitment to equity and inclusion regarding salary, benefits and promotional opportunities will increase employee retention.
- **Mentor/Career Development Programs** – Being able to offer career guidance to all new employees through mentoring by mid- to senior-level managers will help with recruiting and retention efforts.



Create Employee Resource Groups (ERGs) to build inclusive cultures and support employee development.

These groups bring together employees who share an affinity, which allows them to connect, show support to one another and feel empowered in return. ERGs help spread awareness about unique characteristics and needs of employees that belong to the ERGs and provide a platform for underrepresented employees to have a collective voice and boost their visibility within an organization.

ERGs also foster inclusion in various ways, including helping employees feel that they belong and are part of a community, rather than feeling that they are the only one like them within the organization. Being part of an ERG is voluntary and helps employees feel that they can be authentic at work.



ERGs promote inclusivity, diversity and openness and should be a safe place for individuals to speak openly without judgement. Members of ERGs should participate in DEI training and bias awareness.

Common ERGs can be framed around culture or ethnicity, employees with disabilities, women-focused employees, LGBTQ+ employees, faith, veterans, working parents, single parents or caregivers, etc. Once ERGs are established, consideration should be given to having ERG members invite an associate or mentor that is not part of the ERG to attend an ERG meeting. Hearing the conversations will lead to an increased understanding of challenges employees within a particular ERG face, which can build an allyship within the bank.

If ERGs are structured effectively and have well-defined goals, their efforts can play an important role in furthering the bank’s objectives and creating a more inclusive and productive workplace. Click [here](#) for best practices and considerations around forming ERGs.



Create/Review Supplier Diversity Policy. When developing a supplier diversity policy, the bank should clearly outline the reasons for investing in supplier diversity in the policy and what it hopes to achieve as a result. Potential reasons for supplier diversity efforts at your bank may include finding the best suppliers; increasing sustainability; promoting diversity; and supporting the local community.

A supplier diversity policy should be created to:

- Define diverse-owned business categories (minority, woman, LGBTQ, veteran, disability, etc.);
- Outline how your bank will identify and source diverse suppliers;
- Document requirements for diverse suppliers;
- Outline goals established to measure progress (e.g., number of new diverse suppliers, increase percentage of diverse suppliers used, increase diversity spending in dollar amounts and/or percentage, etc.); and
- Define processes, programs and initiatives that will be used to reach those goals.

The policy should be updated regularly to reflect any adjustments needing to be made to processes or goals, and it should be posted on the bank’s website so that it can be accessed by any potential suppliers.

- **Diverse Supplier Development Strategies** – Banks should consider using the following strategies to create visibility of purchasing opportunities and a pathway for diverse suppliers to those opportunities:
 - Create a diverse supplier portal where purchasing opportunities are posted.
 - Participate in or host networking opportunities to connect with diverse-owned businesses to assist with using the supplier portal and share procurement opportunities.

DEI Advisory Group Member Spotlight

“The roadmap is incredibly valuable for banks of all sizes interested in starting or progressing their DEI journey. As a member of the DEI Advisory Group, it was an honor to play a role in the development of such a significant tool.”

Dr. Paul Spradley
Vice President of DEI
Dollar Bank



→ Establish partnerships with diverse-owned business organizations to connect with diverse-owned businesses through conferences, business opportunity exchanges and networking opportunities, as well as share procurement opportunities. These organizations include (but are not limited to):

- Hispanic and African American Chambers of Commerce
- Eastern Minority Supplier Development Council
- National Veterans Business Development Council
- PA Department of General Services Small Diverse Business Search Tool
- Women’s Business Enterprise Center East
- PA Diversity Coalition
- SBA Women-Owned Contracting System
- Service-Disabled Veteran-Owned Small Business Program



Look for opportunities to support Small Business Associations or Minority Business Development Centers with training and mentoring of diverse-owned businesses. These groups assist diverse-owned businesses with financial planning, marketing, bidding process assistance, etc. so they can create or expand their businesses.



Review Community Demographics and Products/Services - A thorough review of the community demographics and the bank’s products/services should take place to ensure what is being offered by the bank aligns with the needs of the communities where the bank operates. The bank should look to offer products/services that meet the needs of their communities, such as Bank On certified accounts, as well as establish partnerships with organizations that serve the unbanked/underbanked (financial empowerment centers, tax counseling services, etc.



Phase 4 - Manage



In the fourth phase of **DEI TRACC - Manage**, the overall DEI initiative and all of the components are managed, maintained and assessed to drive current and future goals. If barriers are identified, corrective action needs to be taken to maintain course. It is also very important to maintain energy and commitment to DEI to drive initiatives and truly change culture. **Since this phase is intended to manage, maintain and assess the bank's efforts, the timeframe is ongoing.**

Roles

DEI Leadership Team – Reviews metrics, employee and customer input

DEI Council – Supports leadership team

Executive Leadership – Receives progress reports

Outcomes

- ✓ DEI Metrics Evaluation and Report
- ✓ Employee and Customer Feedback and Input



Action Steps

 **Conduct regularly scheduled meetings with the DEI Council to solicit input and assess progress of the DEI initiative.**

 **Use metrics established previously to measure impact and report findings to the board.** If goals are not being met, a review and evaluation needs to take place to identify obstacles to meeting goals or if different metrics are needed to truly measure impact. Regular reporting to the board on DEI metrics and outcomes should occur during this phase.

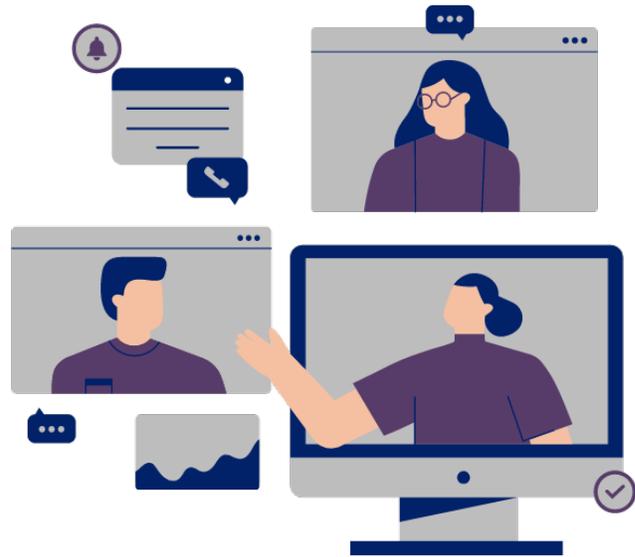
 **Identify any barriers to achieving DEI mission and goals.** If a goal is unsuccessful, it is critical to understand what is happening so that efforts can be refocused and reprioritized to align with the bank's mission and goals. Challenges may exist with employees not accepting DEI efforts, policies not written to be inclusive of all cultures or physical abilities, lack of diversity turning away talent, etc. When challenges are identified, solutions to address them can be outlined and corrective action taken to overcome them.



Establish standard communication vehicles for feedback, input, as well as to share progress and opportunities for improvement. This could include follow-up surveys, submissions by employees through the bank’s intranet, information-sharing sessions held, etc.

If annual employee surveys are used or information sessions are held, be sure the bank’s DEI goals are incorporated into the survey questions or talking points. Survey results or information gathered for the sessions can be used to track the progress of your DEI goals.

Make sure to communicate the bank’s progress both internally (employees and board of directors) and externally (customers and the community) by following the communications strategy that was outlined in phase 2.



Identify learning points from all efforts within the DEI initiative, document them, and share with stakeholders.



Celebrate change in creative ways.

DEI Advisory Group Member Spotlight

“I have had the privilege of being part of the DEI Advisory Group for two years. This group has made great progress in developing tools and resources for PA Bankers members. I am proud to see the roadmap come to fruition.”

Charlotte Bellas
Senior Vice President, Learning & Development Leader
First Commonwealth Bank



Conclusion

PA Bankers Association hopes you find this tool useful as you begin, refine or sustain your bank's DEI efforts. Each bank's journey may look a little different depending on where you are when you start using this tool and the resources available to help you travel throughout your journey.

Creating a DEI effort can seem overwhelming; but, with the actionable steps outlined throughout this guide, we are confident you will be on the path to having a sustainable DEI effort.

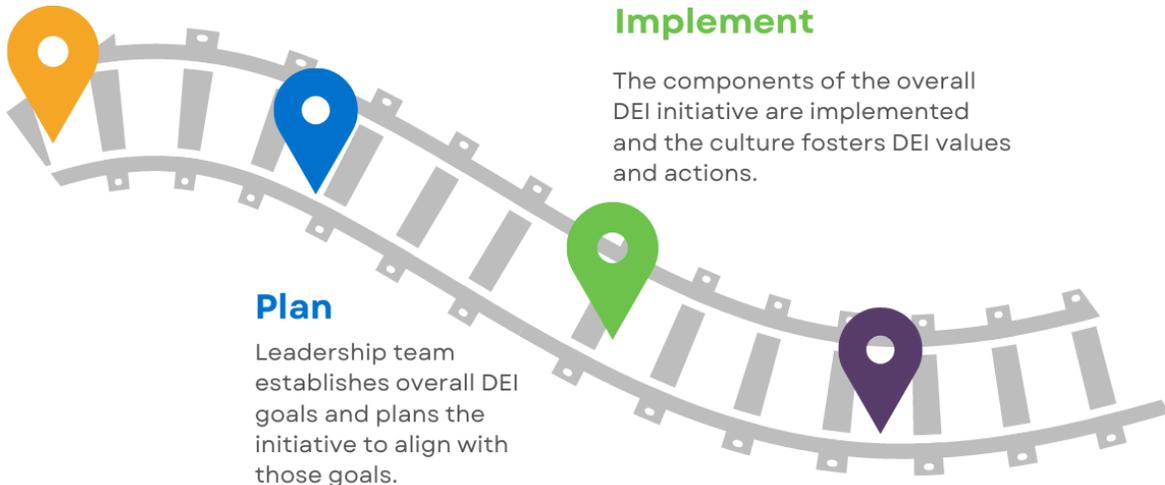
So where is your bank on its DEI journey? What will you do next?

We encourage you to reach out to [Michelle Staton, COO at PA Bankers](#), as you use this tool. We will continue refining the roadmap moving forward and ask that you reach out with any suggestions, ideas, contributions, issues or questions. We are excited to hear from you.

Thank you.

Envision

Bank recognizes importance and value of DEI. Creates leadership team and drafts DEI statement.



Implement

The components of the overall DEI initiative are implemented and the culture fosters DEI values and actions.

Plan

Leadership team establishes overall DEI goals and plans the initiative to align with those goals.

Manage

The overall DEI initiative and all components are managed, maintained and assessed to drive current and future goals.