

Do Ask, Do Tell



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Do Ask, Do Tell

Encouraging Employees with Disabilities to Self-Identify

RESEARCH REPORT R-1569-14-RR by Mary B. Young with Michelle Kan

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Executive Summary

This research investigates what companies are doing to build a disability-inclusive culture and encourage employees with disabilities to voluntarily self-identify, as many organizations with government contracts are now required to do under recent revisions to Section 503 of the Rehabilitation Act of 1973.¹ Based on a survey of 98 companies and interviews with disability experts, our research concludes that many companies still have a lot of work to do before they can meet the new target for representation of employees with disabilities.

- Just 13 percent of participating companies meet or exceed the 7 percent representation target for employees with disabilities, and a majority (59 percent) are at less than 2 percent.
- Most at-target companies use both methods of selfidentification: anonymous and by name.
- At-target companies are more likely than below-target companies to have two disability inclusion practices in place: they provide training and resources to improve disability awareness and they hold managers accountable for meeting disability inclusion goals.
- At-target companies rate their training and resources to improve disability awareness as very effective more often than do those below target.

The report includes a case study describing practices that Wells Fargo put in place to increase the representation of people with disabilities in its workforce. To create a more disability-inclusive workplace, companies can:

- Articulate a clear business case for why employing individuals with disabilities is important
- Put a face on disability by sharing the stories of employees with disabilities
- Foster a strong employee resource group/business network on disabilities
- Capitalize on the convergence of aging workforce issues and disability issues
- Help managers and employees become "disability confident"
- Communicate why they are asking those with disabilities to self-identify
- Communicate how the information will be used and how anonymity or confidentiality will be protected
- Communicate the benefits of self-identification for the employee
- Provide multiple avenues for employees with disabilities to self-identify

This report will help organizations that meet the threshold as government contractors to create an environment in which employees with a disability may feel comfortable self-identifying.

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While Section 503 requires that government contractors ask job applicants, new hires, and current employees to self-identify if they have a disability, this report focuses only on current employees.

Employers May Need Employees with Disabilities to Self-Identify, but Will Employees Do It?

Employees with disabilities may be the largest "diversity" segment of the workforce—20 percent of the US population has a disability and an estimated 20 percent of US workers will develop a disability that lasts a year or more during their careers.² Yet few will identify themselves as such in the workplace, often because they fear being stigmatized or discriminated against. As a result, most employers have no idea how many employees with disabilities work for them.³

Things are about to change. New regulations require that government contractors that have 50 or more employees and do more than \$50,000 in business with the federal government to invite every job applicant, new hire, and current employee in the United States to indicate whether they have a disability. Employers must also report on the percentage of each job group that self-identifies as having a disability against an aspirational goal of 7 percent.

The aim of the US Department of Labor (DOL) is to induce organizations to create more inclusive workplaces where employees feel safe disclosing their disabilities and disability becomes less of a barrier to employment. The ultimate purpose is to increase the employment rate of people with disabilities, which is currently 20 percent, compared to 69 percent for people with no disability. Better employment opportunities would not only benefit people with disabilities, they

would also help employers tap into an underutilized segment of the labor force to offset projected labor shortages.⁵

The immediate concern for many organizations, however, is how to begin collecting this information and ultimately increase the representation of people with disabilities in their workforce.

The New Regulations

DOL's Office of Federal Contract Compliance Programs (OFCCP) issued new regulations to update Section 503 of the Rehabilitation Act of 1973, effective March 24, 2014. Section 503 prohibits discrimination against people with disabilities and puts in place additional affirmative action (AA) requirements with regard to recruitment, hiring, promotion, and retention of individuals with disabilities.

To assist employers with federal contracts in measuring and achieving results, the most significant change is the establishment of a nationwide 7 percent utilization goal. Those that meet the threshold must measure each of their job groups, or their entire workforce if they have 100 or fewer employees, against the 7 percent goal. In the first year, employees are invited to self-identify as having a disability. Employers must issue that invitation at least every five years, with at least one reminder in the intervening ye ars. The representation data should be retained for one to two years, depending on company size.

² Matthew W. Brault, "Americans with Disabilities: 2010," Current Population Reports, P70-131, US Census Bureau, Issued July 2012; Sun Life Financial, "Will workers in America ignore the risks, hope to dodge the bullet, or simply hide? Perceptions, misconceptions, and best practices about long-term disability," Spring/Summer 2012, p. 4.

³ Not all employees with disabilities have a choice about whether to self-identify since, for some, their disability is immediately apparent.

⁴ As of August 2014. See Table A-6, Employment status of the civilian population by sex, age, and disability status, not seasonally adjusted from the US Bureau of Labor Statistics (BLS) Current Population Survey (CPS) for the latest monthly disability employment data. Visit the BLS website for historical data series from the last 10 years.

⁵ Gad Levanon, Bert Colijn, Ben Cheng, and Michael Paterra, From Not Enough Jobs to Not Enough Workers: What Retiring Baby Boomers and the Coming Labor Shortage Mean for Your Company, The Conference Board, Research Report TCB-R-1558-14-RR, 2014. Access the entire suite of products from The Conference Board on this topic at http:// www.conference-board.org/laborshortages/.

Government contractors that fall short of the target are asked to assess whether there are any impediments to equal employment opportunity for people with disabilities and take steps to correct them. Failure to meet the target is not considered a violation, however. As Patricia Shiu, director of OFCCP, said in a webcast for The Conference Board, "The 7 percent goal is going to take time."

While government contractors are encouraged to start following the new requirements as soon as possible, most were not obligated to do so until January 2015, when they were to start their first Affirmative Action Plan cycle under the new regulations.

For the complete details about this new regulation, visit the OFCCP website.

Are You a Person with a Disability?

Based on the Americans with Disabilities Act Amendments Act (ADAAA), a person with a disability is one who:

- 1 has a physical or mental impairment that substantially limits one or more major life activities (e.g., work); or
- 2 has a record of such impairment; or
- 3 is regarded as having such impairment.

The ADAAA does not enumerate all the conditions that are covered under this definition. However, the OFCCP's new self-identification form (see Appendix II on pages 22–23) offers 18 examples based on the ADAAA's criteria:

- Blindness
- Autism
- Bipolar disorder
- Post-traumatic stress disorder (PTSD)
- Deafness
- Cerebral palsy

- Major depression
- Obsessive compulsive disorder
- Cancer
- HIV/AIDS
- Multiple sclerosis (MS)
- Impairments requiring the use of a wheelchair

- Diabetes
- Schizophrenia
- Missing limbs or partially missing limbs
- Epilepsy
- Muscular dystrophy
- Intellectual disability (previously called mental retardation)

Providing examples, some disability advocates say, is problematic because the same disability may affect individuals differently. However, the rationale for including the examples is compelling: without them, many people might not realize they qualify as having a disability. The diabetic who requires insulin, for example, or the person who had cancer five years ago, or the obsessive-compulsive whose symptoms have abated with medication—would they know to check the box indicating a disability?

In addition to educating employees about what qualifies as a disability, employers will also need to explain how the information will be handled and the identities of individuals protected. They must address the question that many employees with disabilities may ask: if I'm not asking for an accommodation due to my disability, what's in it for me to self-identify, even in strictest confidence?

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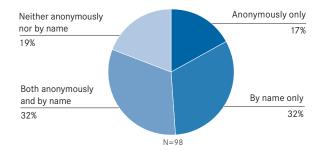
⁶ Patricia Shiu, director, Office of Federal Contract Compliance Programs, "New OFCCP Regulations on Employing People with Disabilities," The Conference Board webcast, August 29, 2013.

Asking Employees with Disabilities to Self-identify

Section 503 requires that government contractors collect data about the representation of employees with disabilities within their workforce using the voluntary self-identification form presented in Appendix II (see pages 22–23). Because employers must report the representation by job group, employees who choose to complete this form must indicate their name so that their responses may be associated with their job group. The form includes an assurance that answers "will not be used against you in any way"—an assurance that employers should make special efforts to communicate, as discussed later in this report.

Yet even before the Section 503 revision went into effect. some employers collected data about disability within their workforce, although they did so in a way that protected employees from potential discrimination. Several of the companies interviewed by The Conference Board, for example, have invited employees to self-identify as a person with a disability by entering this information into the company's human resource information system themselves, where it remains highly confidential. Other companies include a question about disability in their employee engagement survey, which employees complete anonymously. This report will present a continuum of selfidentification practices drawn from research interviews and discuss the implications for employers and employees.

Chart 1 Two methods of voluntary self-identification, four combinations



Source: The Conference Board, 2014

The survey conducted for this report asked about just two methods: anonymous self-identification and selfidentification by name. When asked whether they offered either of these methods, 17 percent of survey respondents reported that their company uses the anonymous method, 32 percent used self-identification by name, 32 percent allowed both methods, and 19 percent had neither.

It Matters How You Ask

Companies that use both anonymous self-identification and self-identification by name, the survey found, have a higher percentage of employees with disabilities than employers who use just one self-identification method. One quarter (25 percent) of those that use both methods currently meet or exceed the 7 percent representation target, much larger than the portion of companies that use just one method, either self-identification by name (7 percent) or *anonymous* self-identification (6 percent). Nearly three-quarters (73 percent) of companies with by-name-only self-identification were in the low-target group, compared to 39 percent of companies with both methods.

The survey also found that companies with a higher representation of employees with disabilities are more likely to do two other things:

- offer training and resources to improve disability awareness, and
- 2 hold managers accountable for meeting disability inclusion goals.

Table 1
Companies that allow both methods of
self-identification most likely to meet
the 7 percent target*

Ways for employees with disabilities to self-identify:

	Anonymously only	By name only	Both anonymously and by name
At-target (7% or more)	6%	7%	25%
Mid-target (2% to < 7%)	29	20	36
Low-target (< 2%)	65	73ª	39 ^b

^{*} Significance at the 90% level

Note: Percentages may not add up to 100 due to rounding.

^a is significantly greater than ^b

Obstacles to Self-identification

Despite the new government requirement, companies believe that the number of employees with disabilities in their workforce is much larger than the number who have selfidentified. The underlying reasons are many—and complex.

Having a disability is still a sensitive issue for many employees. Going on record feels risky, even if individuals feel comfortable telling their manager or coworkers. Many fear bias or discrimination. If they don't need an accommodation, some say their disability is none of the employer's business.

"Having a disability is not the defining characteristic of who someone is or their ability to perform a job," says Stephen Smith, president of Wells Fargo's employee network for disabilities and a leader in the company's technology infrastructure services. But having a disability is also a personal matter that employees may prefer not to disclose if they are concerned about negative consequences.

Compared to veterans and the LGBT community, employees with disabilities are less likely to be "out and proud." Because disability is such a broad category, they may not identify with each other. Despite the government's new clarification of what constitutes a qualifying disability, it's the individual who ultimately decides whether he or she has a disability and, if so, whether to self-identify at work.

And there's another reason why employees may not choose to self-identify: they can't see any personal pay-off for doing so. In fact, an employee may request a disability-related accommodation without indicating in the HR system that he or she has a disability. The company's legal responsibility to ask about disabilities may not be a compelling enough reason for individuals to self-identify.

Given these disincentives, what can companies do to encourage employees with disabilities to self-identify?

How to Encourage Self Identification

To encourage self-identification, employers should:

- Communicate why they are asking, starting with the new regulatory requirement If there's a benefit to the company beyond compliance—for example, having a workforce that mirrors the company's target market, including people with disabilities—explain that, too.
- Communicate how the information will be used In addition, companies should make sure to communicate how anonymity or confidentiality will be protected.

- Communicate the benefits for the employee
 Unless employees are seeking accommodation, they may think long and hard about the risks versus benefits of self-identifying, even anonymously. Companies should anticipate the "What's in it for me?" question and answer it honestly.
- Communicate the ADA's definition of disability and illustrative examples One of the reasons employees with disabilities don't self-identify is that they may not realize they qualify as having a disability.
- Provide multiple avenues for employees with disabilities to self-identify The survey focused on two methods but interviews conducted for this report revealed several others. See "A Spectrum of Employer Approaches to Self-Identification for Employees with Disabilities" (pages 9-10) for a description.

Deb Dagit, a leading disability expert and former chief diversity officer at Merck, suggests several approaches companies can take to encourage employees with disabilities to self-identify. One is to appeal to the employee's self-interest: they may be curious to know how many colleagues are similarly living with a disability, and about the company's resources and process for accommodating people with a disability. Another is to invite employees to be part of the company's journey toward greater inclusiveness. "Acknowledge where you are today, explain where you want to go, and say, 'Here are the ways you can get involved and help us." That sort of invitation elicits a much deeper level of opting-in than simply sending out a bare-bones survey, she says.

Companies that want to develop products and services for customers with disabilities can offer employees another incentive for self-identifying: the opportunity to share their experience and insights, either individually or as part of a focus group, to help the company shape its offerings. Several technology companies interviewed by The Conference Board regularly utilize their disabilities employee resource group (ERG) for market research. But for employees with disabilities to contribute in this way, they need to feel secure enough to self-identify.

Above all, it's important for employers to keep in mind that meeting the 7 percent target isn't the ultimate reason for taking these actions. The point is to create a workplace where talented and capable people that were carefully selected, hired, rewarded, and developed are able to give their absolute best performance.

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A Spectrum of Employer Approaches to Self-Identification for Employees with Disabilities

Companies preparing to track the representation of people with disabilities in their workforce can choose from a range of methods. From the employer's perspective, these alternatives produce increasingly granular data about individuals and their disabilities. For employees, these practices require an increasing level of self-exposure, which could lead to greater risk of encountering bias or discrimination.

The continuum focuses on formal methods of self-identification and data collection, initiated by the employer, as distinct from informal disclosure to selected individuals.

- 1 Don't ask/don't tell Prior to recent changes in Section 503, this was the default option in most organizations. Government contractors weren't required to track the percentage of their workforce with disabilities; most did not, in accordance with the ADA's prohibition against employers asking about disabilities. Employees with disabilities who required accommodations could request them, but such requests might not be captured in the human resource
- information system (HRIS) as part of a disability census.
- 2 Anonymous self-identification If self-identification is truly anonymous, then the information can't be traced back to the individual. For example, a company decides to add a question, "Do you have a disability?" to its annual employee engagement survey, conducted by a third-party vendor. The vendor owns the survey responses. While the company learns

the aggregate number of employees with disabilities who self-identified, that information is stripped of any identifying details. The consulting firm Sirota has been offering this option to companies as part of its employee engagement surveys since 2010 and, by aggregating that data, has gained important insights into engagement factors for employees with disabilities and those without.^a

(Text continues on next page.)

EXHIBIT A

	Don't ask/ don't tell	Anonymous self-identification	Confidential self-identification	Self-identification, including type of disability	Putting a face on disability in the workplace	
EMPLOYER OPTIONS	GRANULARITY OF INFORMATION EMPLOYER GETS ABOUT EMPLOYEE AND DISABILITY					
	Don't ask	Outsource anonymous employee survey that includes yes/no question about disability	Confidential employee survey (in-house or by vendor) with yes/ no question regarding disability Invitation to confidentially self-identify (yes/ no regarding disability) in HR system	Invitation to confidentially identify the specific type of disability Confidential outreach with option to receive information regarding company resources that may be of interest	"Putting a face" on disability: raising the profile of employees with disabilities in workforce; sharing their stories with their managers and coworkers	
OPTIONS FOR EMPLOYEES WITH DISABILITIES	EMPLOYEE'S LEVEL OF EXPOSURE					
	Don't tell	Anonymously self-identify Informally self-identify to others at employee's discretion	Confidentially self-identify as having a disability Informally self-identify to others at employee's discretion	Confidentially identify specific disability Opt-in to resources company offers Informally self-identify to others at employee's	Be "out" or "out and proud" about disability Informally self- identify to others at employee's discretion	

Source: The Conference Board, 2014

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a Peter Rutigliano and Scott Gebhardt, "Engagement Differences between Employees with Disabilities and Those Without," 29th Annual Conference of The Society for Industrial and Organizational Psychology, May 2014; Peter Rutigliano, Tiffany Ivory, Meg O'Connell, and David Reeves, "Engagement among employees with disabilities: Initial reports," presented at 27th Annual Conference of The Society for Industrial and Organizational Psychology, April 2012.

A Spectrum of Employer Approaches to Self-Identification for Employees with Disabilities (continued)

3 Confidential self-identification

Under Section 503, government contractors are now required to use a standard form to conduct, in effect, a disability census of their US workforce. The document spells out how individual identities will be protected (see Appendix II: Voluntary Self-Identification of Disability Form CC-305, on pages 22–23). Collecting this information enables employers to assess the representation of self-identified employees with disabilities in their workforce and track that measure over time.

Alternatively, companies that do not fall under Section 503 (e.g., non-contractors) can ask employees to complete a confidential HRIS record.

In either case, the company only learns the number of people who have indicated they have a disability, but nothing about what that disability is or how it affects the employee's requirements, strengths, limitations, performance, etc. While a yes/no answer satisfies government reporting requirements, it doesn't give an employer much in the way of practical insights. On the other hand, it protects the company from having "too much" information, which it could potentially be accused of using for discriminatory purposes.

For individuals, confidential data collection provides some level of assurance that they won't be "outed" if they prefer not to be. Yet despite this promise of confidentiality, some employees may fear that their identities won't be protected or that this information could be used against them.

4 Self-identification including type of disability Some companies want more than a yes/ no answer to the "do you have a disability" question. They want to understand what they can do to make the workplace "work" for employees with a whole range of differences, including disabilities. IBM's diversity strategy helps the company identify many segments or communities within its workforce. "If you're trying to create an environment to attract the very best people from these communities, you have to start by finding out who these people are," said Ron Glover, vice president, diversity and workplace policy. To do this, IBM invites employees to voluntarily self-identify regarding a broad range of factors, disability included. Those who do are invited to opt-in to various resources,

including both global and local communities of IBMers who share the same attribute. While protecting individual identities, IBM uses aggregated data and analytics to inform its talent management practices. It can also parlay these insights into new offerings for its business customers.

5 Putting a face on disability in the workplace One way to de-stigmatize disabilities is to make them familiar and ordinary. For example, an employer might highlight the stories of employees with disabilities in the workplace and the company's efforts to recruit, hire, develop, and retain this talent segment. If having a disability is seen as "no big deal," then self-identifying may become the same.

As part of a campaign to encourage employees with disabilities to voluntarily self-identify and to reduce the stigma associated with disabilities, Prudential Financial, Inc. plans to air videos in which selected company leaders self-identify as having a disability.

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b Mary Young, Better Together: Advancing Diversity and Inclusion through Analytics and Strategic Workforce Planning, The Conference Board, Executive Action Report 403, 2013.

The Challenge of Encouraging Greater Self-Identification at Wells Fargo

Wells Fargo didn't wait for the new OFCCP regulations to invite individuals with disabilities to self-identify: employees have had the option of indicating disability status in their confidential human resources record for over a decade. In recent years, however, several team member networks (Wells Fargo's name for its employee resource groups) began to champion self-identification as a way to affirm their community's presence within the workforce. It began in 2011 when PRIDE, the LGBT network, made a business case for adding two new categories—sexual orientation and gender identity—to the human resources information system (HRIS) and then alerted members to these new data fields. Soon after, two other networks, Diverse Abilities and Veterans, made similar outreach efforts to their members.

As part of its ongoing efforts to promote an inclusive workplace, Wells Fargo launched an enterprise communication plan, encouraging all US employees to update their personal information. Kathy Russell, business initiatives manager for enterprise diversity and inclusion, was the project lead for this effort, which the company rolled out through every available communication channel. The technology part was easy, she says. The change management part took more thought. Russell met with the networks to promote awareness and explain why the company was becoming more proactive about collecting this information, how it would be used, who would have access, and how individuals' identities would be protected. Each network used its newsletter, website, and other communications to promote the enhancements to its members and provided them with a link to the HRIS website.

Rather than sending a one-time message, the company continues to use events throughout the year, such as the annual benefits enrollment and the employee engagement survey, to remind employees to check that their personal information is still current.

Whether to self-identify is a very personal decision; there is no easy answer when an employee asks "What's in it for me?"

Under the new Section 503 regulations, Wells Fargo must now survey its entire US workforce (263,000 FTEs out of 272,000 globally) in 2015 and every five years thereafter to ask if they have a disability now or have ever had a disability. The company must decide how best to communicate the regulatory changes and examples of qualifying disabilities.

Like other companies interviewed for this report, Wells Fargo did not disclose to The Conference Board the percentage of its workforce that self-identified as disabled; and like other companies, it believes that the number that has gone on record is much smaller than the actual representation. In fact, of all the "diversity" populations within Wells Fargo, the disability segment has the smallest percentage who have self-identified.

"Some team members say there is no value-add to them in being a statistic simply to help Wells Fargo comply with regulatory requirements," says Russell.

Like other companies, Wells Fargo must balance competing objectives. On one hand, part of being a disability-inclusive workplace is respecting an employee's right not to self-identify, even confidentially. "The risk/benefit assessment is a very personal decision," says Russell. On the other hand, Wells Fargo must measure the effectiveness of its outreach, sourcing, hiring, and promotion of individuals with disabilities against the 7 percent representation target, as required under Section 503. If the current number is below that, then the company has a stake in bringing it higher. But compliance reporting isn't the only reason. If more employees confidentially self-identify in the HRIS system, Wells Fargo can better understand this segment of the workforce using human capital analytics. "Having access to this data is the foundation," says Russell. By aggregating and analyzing this information—alone or in combination with engagement survey data, for example—Wells Fargo can eventually gain a much deeper understanding of its team members with disabilities and what it can do to recruit, hire, develop, retain, and motivate them.

That matters to Wells Fargo for a number of reasons. The company wants its workforce to reflect the communities it serves, and it wants to provide a workplace where team members with disabilities can be their most productive. Moreover, Wells Fargo's diversity metrics could be a competitive advantage when bidding against other financial services firms for institutional business. The irony, says Diverse Abilities' Smith, is that it's far easier for companies to get demographic data about the growing disabilities marketplace—that is, about people with disabilities outside the company—than to get this data about their own workforce. For that to change, Wells Fargo and other employers will have to find a better answer to the question that many team members with disabilities are asking: "What's in it for me?"

Survey Findings: The Seven Percent Target Is Elusive

By asking government contractors to report and track their progress in meeting the 7 percent target, Section 503 aims, in the long term, to encourage effective practices that result in higher employment for people with disabilities. Conducted several months after the new regulations took effect, the survey provides a snapshot of how well companies measure up to that standard today.

Of the 98 companies that reported a self-identification method, 75 specified the percentage of their US workforce that has self-identified as having a disability. Of these, 13 percent met or exceeded the 7 percent target. The majority (87 percent) fell short of this goal (Chart 2).

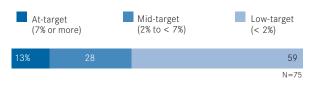
Because the preponderance of companies was below target, the group was divided into two subcategories:

- Mid-target companies where at least 2 percent but less than 7 percent of the workforce has a disability (21 companies, or 28 percent of respondents who answered this question)
- Low-target companies in which employees with disabilities make up less than 2 percent of their workforce (44 companies, or 59 percent of respondents that answered this question)

While this new categorization creates a "middle" group, it does not alter the stark picture that the survey findings present: at a sizeable majority of companies, employees with disabilities are seriously under-represented—or, at least, under-identified—compared to the target.

Chart 2

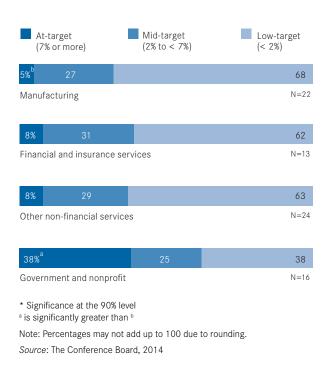
Most companies do not meet the 7 percent target



Source: The Conference Board, 2014

Employers in one sector out-performed all others: more than one-third (38 percent) of organizations in the government and nonprofit sector meet the 7 percent target for employees with disabilities, considerably more than manufacturing organizations (5 percent). Just 8 percent of companies in financial services and 8 percent of those in other non-financial services met the target (Chart 3). The higher level of representation among government employers is due, in part, to two executive orders mandating the federal government to employ an additional 100,000 people with disabilities. Federal agencies are also required to set goals for employing individuals with selected "target" disabilities and to report progress in meeting those goals.⁷

Chart 3
Organizations in one sector were more likely to meet the target*



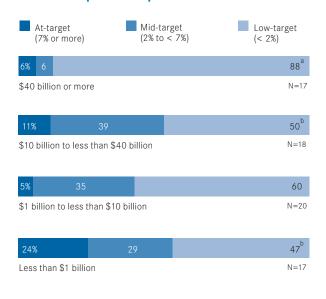
^{7 &}quot;Increasing Disability Employment in the Federal Government: A Toolkit for Federal Agencies on Implementing Executive Order 13548," Office of Disability Employment Policy; "Executive Order 13548 of July 26, 2010: Increasing Federal Employment of Individuals with Disabilities," Federal Register 75, No. 146, 30 July 2010, p. 45039.

The size of an organization's workforce was not related to whether it met the 7 percent target. However, companies with the highest annual revenues were more likely than those with lower revenues to be in the low-target group (Chart 4). This finding is counterintuitive, since it is often the case that higher revenue companies have more resources to invest internally, for example, in increasing employee diversity. However, 24 percent of companies in the high-revenue segment reported that they used neither method of self-identification. Therefore, their low representation may be due to lack of corporate data.

While companies concerned about failing to meet the 7 percent target may take comfort in seeing that they are not alone, they need to know what actions may increase representation and self-identification. The survey results suggest some answers.

Chart 4

Companies with \$40+ billion US revenues more likely to have < 2 percent representation*



^{*} Significance at the 90% level

a is significantly greater than b

Effective Practices for Building a Disability-Inclusive Workplace

The Conference Board interviewed executives at six companies as well as several disability experts about the challenges employers face in building a disability-inclusive workplace and encouraging employees with disabilities to self-identify. The practical implications that follow draw on both these interviews and the survey data.

Most government contractors covered under Section 503 will need to increase the representation of employees with disabilities in their workforce—or, at the very least, increase the percentage of employees with disabilities who identify as such, either anonymously or by name. While these two objectives are closely related, they are not synonymous.

The experts interviewed agree that the official count of employees with disabilities in a company's workforce is a fraction of the actual number. "We have 25,000 employees. As of today, just 44 have self-identified as having a disability," one executive said. "We know that's a ridiculous number, but we really hadn't looked at it before this year or done anything to make it a better number."

Companies with a higher representation of employees with disabilities are more likely than other companies to rate their disability awareness effort as *very effective*. This is good news for organizations that want to improve representation, since it provides clear direction for taking action. In fact, improving disability awareness is, in many ways, one of the most basic steps an employer might take.

The research interviews yielded additional insights about actions that promote more disability inclusion.

- Articulate a clear business case for why employing individuals with disabilities is important and, if appropriate, the disability market's importance to the company's business strategy, as illustrated by the Wells Fargo case study (page 11).
- Highlight the stories of employees who have a disability and/ or actively identify as an ally for people with disabilities in your organization (with their permission). Their story should include their career path, insights about working at your company, challenges, successes, and what's helped them along the way.

"When 15 percent of the workforce self-identifies as employees with disabilities and/or as allies, we'll see a similar phenomenon as we saw with the LGBT population," says Deb Dagit. The gay population became less stigmatized as more people came out, and allies became more visible and vocal, especially in industries (such as retail and technology) that have worked to create a LGBT-friendly workplace.

- Foster a strong employee resource group (ERG) focused on people with disabilities and make it a sounding board for improving disability inclusion. At many companies, this group includes both employees with disabilities and employees with a family member that has a disability. Better still, says Dagit, build an even broader base of support by cultivating disability allies, a strategy that has served the LGBT community well. Many employers have also found success by forming a precursor to an ERG for people with disabilities: a disability advisory team that includes key representatives from functions that assist with providing accommodations such as IT, facilities, safety, security, and benefits. This team must also include several individuals with various types of disabilities. It will initially advise on enhancing the company's reasonable accommodations process, but these teams often grow into an ERG.
- Capitalize on the convergence of aging workforce issues and disability issues. Baby boomers who are developing age-related disabilities (loss of hearing or a bad knee, for example) and those who have grandchildren on the autism spectrum or with other disabilities, could swell the ranks of those who support a more disability-inclusive workplace.
- Help managers and employees become "disability confident." Employees with disabilities are not the only ones with fears about disabilities. Many managers have concerns about how to manage an employee with a disability, the cost of accommodations, or other challenges. Coworkers may feel awkward about how to interact with employees with disabilities and, as a result, simply avoid it. By providing disability awareness education, companies can help their employees become more comfortable interacting across different employee populations.

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Now that the Section 503 amendments have gone into effect, disability inclusion in the workplace has become a hot topic for government contractors. Some experts worry that corporate interest will subside if there are no adverse consequences for those that fall short. But for other companies, the government's stretch goal could become a catalyst. It could coalesce disparate segments of the workforce—the virtual worker who, it turns out, has a severe speech impediment; the aging boomer with a bad hip; the parent of a child with autism; the person with attention deficit disorder (ADD) who wears headphones all day because that's the only way they can concentrate to share insights about what they need to be effective in the workplace, and to partner with their employers to find creative ways to accommodate diverse workplace needs.

Section 503's self-identification process will enable companies to gain new insights about employees with disabilities as a workforce segment, using human capital analytics while protecting individual identities. Research has identified significant differences in overall employee engagement between employees with disabilities and those without.8 By marrying data on self-identified employees with other human resource data, employers can compare representation by business unit, job group, organizational level, and location. They can look at tenure, retention, and promotion rates, and evaluate how inclusive the organization is regarding people with disabilities and the effectiveness of specific practices.

Survey Findings: What Companies Are Doing Today

Respondents were asked to rate the effectiveness of 25 organizational practices identified by previous research as supporting a disability-inclusive culture, or to indicate if their company didn't have the practice in place. The analysis that follows presents the number and type of practices companies reported and how effectively they perform those practices. Appendix I (see pages 19–21) provides a comparison of responses based on company size and sector.

Number and Prevalence of Disability **Inclusion Practices**

The number of disability inclusion practices that companies reported ranged from 0 to 25. Nearly half (46 percent) had 16 or more practices and almost one-third (30 percent) had 21 or more practices in place (see Chart 5 on page 16).

More than three-quarters of participating organizations have the following practices in place:

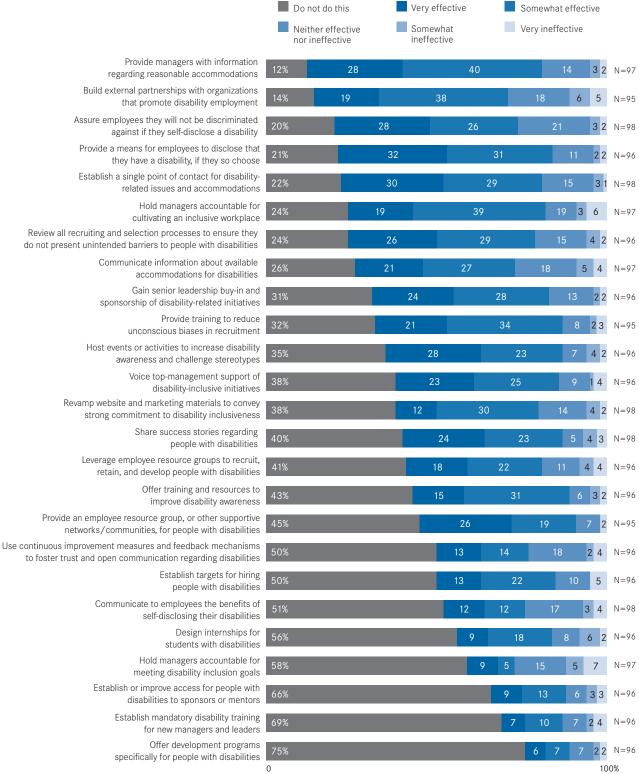
- Provide managers with information regarding reasonable accommodations (88 percent)
- Build external partnerships with organizations that promote disability employment (86 percent)
- Assure employees they will not be discriminated against if they self-disclose a disability (80 percent)
- Provide a means for employees to disclose that they have a disability, if they so choose (79 percent)
- Establish a single point of contact for disability-related issues and accommodations (78 percent)
- Hold managers accountable for cultivating an inclusive workplace (76 percent)
- Review all recruiting and selection processes to ensure they do not present unintended barriers to people with disabilities (76 percent)

Rutigliano and Gebhardt, "Engagement Differences between Employees with Disabilities and Those Without," May 2014; Rutigliano, Ivory, O'Connell, and Reeves, "Engagement among employees with disabilities," April 2012.

Organizational practices were drawn from previous research: William A. Erickson, Sarah von Schrader, Susanne M. Bruyère, and Sara A. VanLooy, "The Employment Environment: Employer Perspectives, Policies, and Practices Regarding the Employment of Persons with Disabilities," Rehabilitation Counseling Bulletin 57, No. 4, July 2014, p. 195-208; see Cornell University ILR School Employment and Disability Institute 2013 research brief for partial survey results, conducted in collaboration with Society for Human Resource Management (SHRM); and Sarah von Schrader, Valerie Malzer, William A. Erickson, and Susanne M. Bruyère, "Emerging Employment Issues for People with Disabilities," Cornell University ILR School Employment and Disability Institute and American Association of People with Disabilities (AAPD), December 7, 2011.

Chart 5

Prevalence and effectiveness of 25 disability inclusion practices



Note: Percentages may not add up to 100 due to rounding. Source: The Conference Board, 2014

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Less than half of organizations have the following practices:

- Communicate to employees the benefits of self-disclosing their disabilities (49 percent)
- Design internships for students with disabilities (44 percent)
- Hold managers accountable for meeting disability inclusion goals (42 percent)
- Establish or improve access for people with disabilities to sponsors or mentors (34 percent)
- Establish mandatory disability training for new managers and leaders (31 percent)
- Offer developmental programs especially for people with disabilities (25 percent)

Effectiveness of Disability Inclusion Practices

Chart 5 also shows how effectively respondents think their company performs each practice. More than 25 percent of companies reported they are very effective at seven practices:

- 32 percent very effectively provide a means for employees to disclose that they have a disability, if they so choose
- 30 percent very effectively establish a single point of contact for disability-related issues and accommodations
- 28 percent very effectively host events or activities to increase disability awareness and challenge stereotypes
- 28 percent very effectively provide managers with information regarding reasonable accommodations
- 28 percent very effectively assure employees they will not be discriminated against if they self-disclose a disability
- 26 percent very effectively provide an employee resource group, or other supportive networks/communities, for people with disabilities
- 26 percent very effectively review all recruiting and selection processes to ensure they do not present unintended barriers to people with disabilities

Overall, companies were more likely to rate their practices as effective or very effective than to give them a lower rating. This points to a striking paradox in the research findings: a large majority of companies fall significantly short of the representation goal for employees with disabilities, yet they report that they effectively perform disability inclusion practices. One explanation is that, in the absence of data about the number of people with disabilities in their workforce, companies have no way of knowing how effective or ineffective their efforts are.

If this interpretation is correct, then one might expect to see these ratings moderate in the future, once employers begin tracking representation. They may also become more astute about what practices deliver the best return on investment, rather than rating all of them quite favorably.

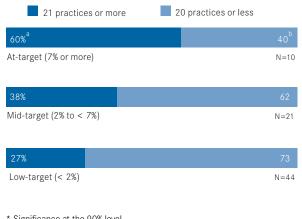
What Do At-Target Companies Do That Many Below-Target Companies Do Not?

Research conducted for this report compared at-target and below-target companies to identify meaningful differences in the number of disability inclusion practices they report and each practice's effectiveness. Do at-target organizations have more disability-inclusive practices in place? That is, do they simply do more? Are their efforts more effective? Or are there specific practices whose effectiveness sets at-target companies apart from others where the representation level of employees with disabilities is below target?

Number of Practices

At-target companies were more likely to have 21 or more of the 25 practices. For the mid-target and low-target groups, the relationship between number of practices and disability representation was weaker.





* Significance at the 90% level

^a is significantly greater than ^b

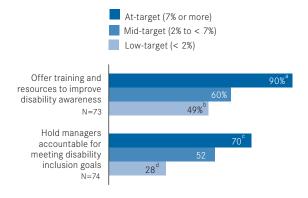
Prevalence of Practices

Two practices are more common in companies that meet or exceed the 7 percent target than in below-target companies: improving disability awareness and holding managers accountable for meeting targets.

- While 90 percent of at-target companies offer training and resources to improve disability awareness, just 49 percent of low-target companies do so.
- At-target companies (70 percent) are more than twice as likely as low-target companies (28 percent) to hold managers accountable for meeting disability inclusion goals.

Chart 7

At-target companies more likely than others to have these practices in place*



^{*} Significance at the 90% level

Source: The Conference Board, 2014

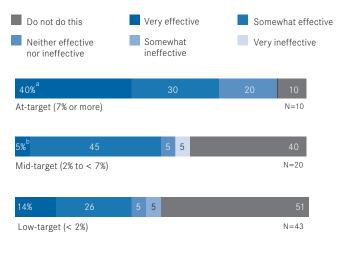
Effectiveness of Practices

At-target companies were significantly more likely to perform one practice—offering training and resources to improve disability awareness—very effectively (40 percent) than companies at the mid-target level (5 percent).

Chart 8

Offering training and resources to improve disability awareness*

This is one practice that at-target companies are more likely to perform very effectively.



^{*} Significance at the 90% level

Note: Percentages may not add up to 100 due to rounding.

^a is significantly greater than ^b

[°] is significantly greater than d

a is significantly greater than b

A Comparison of Disability Inclusion Practices by Company Characteristics

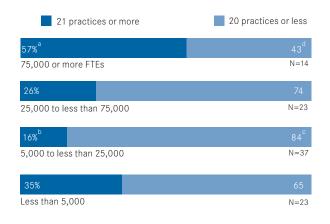
Number of Disability Inclusion Practices

Companies with 75,000 or more US employees were more likely than smaller companies to have 21 or more practices. The fact that they do, and yet are also more likely than smaller companies to have less than 2 percent of their workforce self-identified as having a disability, suggests that increasing the number of disability inclusion practices may not necessarily result in higher representation.

Prevalence of Disability Inclusion Practices

The size of the workforce was not related to what practices companies had in place. Annual revenues were, however. Companies with annual revenues of \$1 billion to less than \$10 billion (17 percent) or \$10 billion to less than \$40 billion (26 percent) were less likely than companies with \$40 billion or more (59 percent) to establish or improve access for people with disabilities to sponsors or mentors.

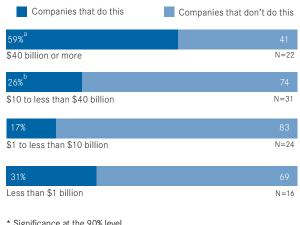
Chart A Companies with 75,000 or more FTEs more likely to have 21 or more practices*



^{*} Significance at the 90% level

Chart B

Companies with US\$40 billion or more in revenues more likely to establish or improve access for people with disabilities to sponsors*



^{*} Significance at the 90% level

^a is significantly greater than ^b

 $^{^{\}rm c}$ is significantly greater than $^{\rm d}$ Source: The Conference Board, 2014

^a is significantly greater than ^b

Manufacturing companies (69 percent) were more likely than companies in other sectors to establish targets for hiring people with disabilities.

More organizations in the government and nonprofit sector (82 percent) than in any other sector communicate to employees the benefits of self-disclosing their disabilities.

Chart C

Manufacturing sector more likely than other sectors to establish targets for hiring people with disabilities*

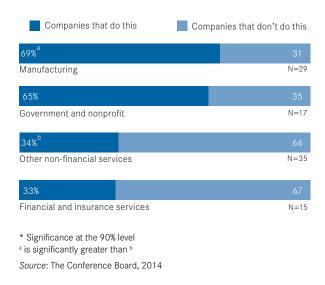
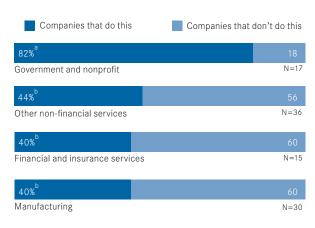


Chart D

Government and nonprofit sector more likely to communicate the benefits of self-identification*



- * Significance at the 90% level
- $^{\rm a}$ is significantly greater than $^{\rm b}$

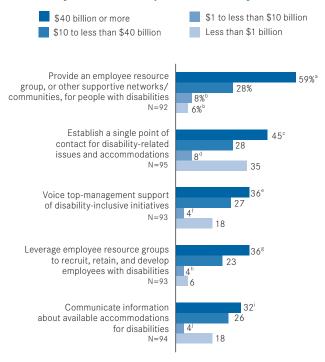
Source: The Conference Board, 2014

Effectiveness of Disability Inclusion Practices

The following charts compare the percentage of companies, based on revenue, number of full-time employees, and industry sector that rated particular practices as *very effective*.

Chart E

Companies with US\$40 billion or more in revenues more likely to rate these practices as *very effective**

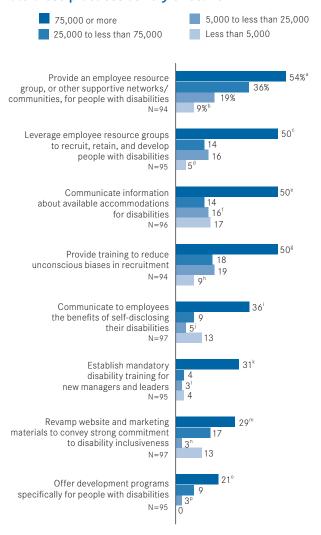


- * Significance at the 90% level
- ^a is significantly greater than ^b
- $^{\mbox{\tiny c}}$ is significantly greater than $^{\mbox{\tiny d}}$

- ^e is significantly greater than ^f
- g is significantly greater than h
- i is significantly greater than j

Chart F

Companies with 75,000 or more FTEs more likely to rate these practices as *very effective**



 $^{\rm i}$ is significantly greater than $^{\rm j}$ $^{\rm k}$ is significantly greater than $^{\rm l}$

m is significantly greater than n

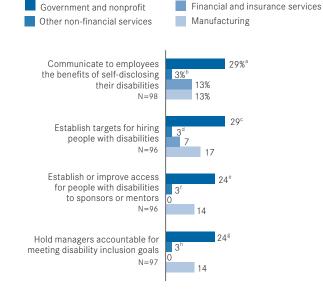
° is significantly greater than °

- * Significance at the 90% level
- ^a is significantly greater than ^b
- ° is significantly greater than d
- e is significantly greater than f
- $^{\rm g}$ is significantly greater than $^{\rm h}$

Source: The Conference Board, 2014

Chart G

Organizations in the government and nonprofit sector more likely to rate these practices *very effective**



- * Significance at the 90% level
- ^a is significantly greater than ^b
- ° is significantly greater than d
- Source: The Conference Board, 2014
- e is significantly greater than f
- g is significantly greater than h

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Appendix II

Voluntary Self-Identification of Disability Form CC-305

The federal regulation requires that employees identify by name and also work group. However, in companies that allow both anonymous and confidential options, employees might choose to self-identify anonymously but not self-identify on the government form.

Voluntary Self-Identification of Disability Form CC-305 OMB Control Number 1250-0005 Expires 1/31/2017 Page 1 of 2 Why are you being asked to complete this form? Because we do business with the government, we must reach out to, hire, and provide equal opportunity to qualified people with disabilities. To help us measure how well we are doing, we are asking you to tell us if you have a disability or if you ever had a disability. Completing this form is voluntary, but we hope that you will choose to fill it out. If you are applying for a job, any answer you give will be kept private and will not be used against you in any way. If you already work for us, your answer will not be used against you in any way. Because a person may become disabled at any time, we are required to ask all of our employees to update their information every five years. You may voluntarily self-identify as having a disability on this form without fear of any punishment because you did not identify as having a disability earlier. How do I know if I have a disability? You are considered to have a disability if you have a physical or mental impairment or medical condition that substantially limits a major life activity, or if you have a history or record of such an impairment or medical condition. Disabilities include, but are not limited to: Blindness Autism Bipolar disorder Post-traumatic stress disorder Deafness Cerebral palsy Major depression (PTSD) HIV/AIDS Multiple sclerosis (MS) Cancer Obsessive compulsive disorder Schizophrenia Missing limbs or • Impairments requiring the use Diabetes Epilepsy Muscular partially missing limbs of a wheelchair dystrophy Intellectual disability (previously) called mental retardation) Please check one of the boxes below: ☐ YES, I HAVE A DISABILITY (or previously had a disability) ☐ NO, I DON'T HAVE A DISABILITY ☐ I DON'T WISH TO ANSWER

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Today's Date

Your Name

Voluntary Self-Identification of Disability Form CC-305 (continued)

Voluntary Self-Identification of Disability

Form CC-305 OMB Control Number 1250-0005 Expires 1/31/2017 Page 2 of 2

Reasonable Accommodation Notice

Federal law requires employers to provide reasonable accommodation to qualified individuals with disabilities. Please tell us if you require a reasonable accommodation to apply for a job or to perform your job. Examples of reasonable accommodation include making a change to the application process or work procedures, providing documents in an alternate format, using a sign language interpreter, or using specialized equipment.

i Section 503 of the Rehabilitation Act of 1973, as amended. For more information about this form or the equal employment obligations of Federal contractors, visit the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) website at www.dol.gov/ofccp.

PUBLIC BURDEN STATEMENT: According to the Paperwork Reduction Act of 1995 no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. This survey should take about 5 minutes to complete.

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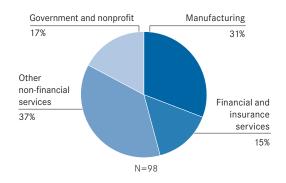
Research Methodology

In July 2014, The Conference Board distributed an online survey to individuals based in the United States who had attended or accessed one or more of its diversity & inclusion (D&I) offerings. Senior executives who participate in one of The Conference Board councils on diversity and inclusion were also invited to complete the survey. The survey generated responses from 98 organizations with US operations. The following charts illustrate the range of industries and size in terms of headcount and US annual revenues. Most organizations are in other non-financial services (37 percent) and manufacturing (31 percent). More than half of the organizations (61 percent) have \$10 billion and over in annual US revenues and 38 percent have 25,000 or more employees.

The roles of individual respondents were varied and in several functions: human resources, talent management, D&I, equal employment opportunity (EEO), and affirmative action (AA). Their job levels ranged from HR generalist to chief diversity officer.

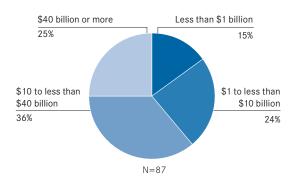
In addition, the authors interviewed disability leaders at six member companies as well as three disability experts to understand their experiences and insights about effective practices and the challenges of developing a disability-inclusive workplace.

Primary business



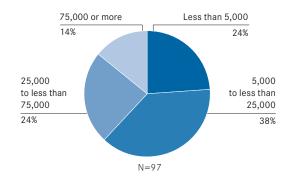
Source: The Conference Board, 2014

Total US FY13 revenues



Source: The Conference Board, 2014

Total US headcount (FTE) on December 31, 2013



Source: The Conference Board, 2014

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Additional Resources

Related Research

Opening the Doors of Small Business to Employees with Disabilities: Critical Concerns and Strategies for Success The Conference Board and EARN, August 2014

Tapping Hidden Talent Pools: Recruiting, Developing, and Retaining Veterans and People with Disabilities The Conference Board, June 2014

Perspectives on Disability Disclosure: The Importance of Employer Practices and Workplace Climate Sarah von Schrader, Valerie Malzer, Susanne M. Bruyère, Cornell University Employment and Disability Institute, July 2013

Leveling the Playing Field: Attracting, Engaging, and Advancing People with Disabilities The Conference Board, February 2013

Moving from Disability Accommodation to Inclusion Patrick Hyland and Pete Rutigliano, Sirota, *Diversity Executive*, January/ February 2013, pp. 16-18

Business Strategies that Work: A Framework for Disability Inclusion US Department of Labor Office of Disability Employment Policy, 2012

Implementing Inclusive Employment Policies and Practices EARN and NETAC, 2010

Disability Is Diversity: Effective Hiring Practices for Federal Employers EARN and NETAC, 2010

Fitting the Work to the Worker: Recruiting, Engaging, and Retaining Employees with Disabilities The Conference Board, August 2010

Disability in the Workplace: Company Practices International Labour Organization (ILO), Bureau for Employers' Activities and Sk ills and Employability Department, 2010

Survey of Employer Perspectives on the Employment of People with Disabilities: Technical Report Christine Domzal, Andrew Houtenville, and Ravi Sharma, CESSI (Prepared under contract to the Office of Disability and Employment Policy, US Department of Labor), 2008

Corporate Culture and the Employment of Persons with Disabilities Lisa Schur, Douglas Kruse, and Peter Blanck, Rutgers University, Labor Program, 2005

Disability Employment Policies and Practices in Private and Federal Sector Organizations Susanne M. Bruyère, Cornell University Employment and Disability Institute, 2000

Briefs and Presentations

Research Brief: Disability Inclusive Recruitment and Hiring Practices and Policies: Who Has Them and What Difference Does it Really Make? William Erickson, Cornell Employment and Disability Institute, 2014

Research Brief: Inside the Workplace: Case Studies of Factors Influencing Engagement of People with Disabilities Lisa H. Nishii and Susanne M. Bruyère, Cornell Employment and Disability Institute, 2014

Employees With Disabilities Section 503 Changes: Implications and Recommendations, Symposium presented in May 2014 at The 29th Annual Conference of The Society for Industrial and Organizational Psychology (SIOP) in Honolulu, Hawaii by Scott Gebhardt (Hofstra University and Sirota); Tania Lavin (Allegis); Lisa H. Nishii, Susanne M. Bruyère, and Sarah von Schrader (Cornell University); Meg O'Connell (National Organization on Disability); and moderator Pete Rutigliano (Sirota)

Disability Disclosure and Self-identification: Benefits, Barriers and Implementable Solutions EARN, NETAC, and Cornell University Employment and Disability Institute, 2013

Employing People With Disabilities: Practices and Policies Related to Retention and Advancement SHRM and Cornell Employment and Disability Institute, May 2012

Employing People With Disabilities: Practices and Policies Related to Accessibility and Accommodation SHRM and Cornell Employment and Disability Institute, May 2012

Employing People With Disabilities: Practices and Policies Related to Recruiting and Hiring Employees With Disabilities SHRM and Cornell Employment and Disability Institute, April 2012

Employment of persons with disabilities and 'inclusive corporate culture' Yuliya Kuznetsova, Norwegian Social Research, 2012

Employees with Disabilities: The Forgotten Diversity Segment (Slides PDF) (Infographic) (Webinar), Pete Rutigliano (Sirota), Meg O'Connell (National Organization in Disability), training webinar September 27, 2011

What Is an Inclusive Culture? Syracuse University Burton Blatt Institute, March 2011

Diverse Perspectives: People with Disabilities Fulfilling Your Business Goals Office of Disability Employment Policy (ODEP)

Talent to Drive Your Business' Success (Business Case Interactive Visualization), EARN

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Additional Resources (continued)

On-Demand Webcasts from The Conference Board

Do Ask, Do Tell: Encouraging Disability Self-ID in an Inclusive Workplace September 2014

Achieving Results with the Disability Employment Tracker September 2014

From Application to Onboarding: Accommodations Make a Difference September 2014

Opening the Doors of Small Business to People with Disabilities, Part 1 April 2014

Opening the Doors of Small Business to People with Disabilities, Part 2 April 2014

Emerging Lessons from the Disability Employment Tracker March 2014

Book Discussion: Employment and Work September 2013

New OFCCP Regulations on Employing People with Disabilities August 2013

Improving the Employment Outcomes for People with Disabilities April 2013

Leveling the Playing Field for Employees with Disabilities July 2012

Maximizing Human Capital: Employees with Disabilities: Building Your Leadership Pipeline April 2009

Useful Links for More Information

Employer Assistance and Resource Network (EARN)

Cornell Online Repository of Related Publications

Department of Labor (DOL) Resources for Employers

Disability and Employment Community of Practice (sponsored by the US Department of Labor, Employment and Training Administration)

Disability.gov Blog

Job Accommodation Network (JAN)

International Labor Organization (ILO)—Disability and Work

ILO Global Business and Disability Network

National Council on Disability (NCD) Employment Publications

National Organization on Disability (NOD) Research Publications

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About the Authors

Mary Young, principal researcher, human capital, leads The Conference Board program of research on strategic workforce planning (SWP) and has been a major contributor to the company's research on human capital risk and human capital analytics. She has studied strategic workforce planning's emergence and evolution as a business process in more than 70 companies.

Her research on SWP is available in 20 research publications from The Conference Board, including Nobody's Perfect:

Overcoming the Limitations of External Labor Market Data to Make Better Business Decisions (2014), Human Rights Risk (2013), Managing the Total Workforce: Bringing Contingent Workers inside the Strategic Workforce Planning Tent (2013), Strategic Workforce Planning across National Borders (2012), Managing Human Capital Risk (2011), Strategic Workforce Planning in Global Organizations (2010), Implementing Strategic Workforce Planning (2009), Gray Skies, Silver Linings (2007), and Strategic Workforce Planning (2006).

Young received her doctorate in organizational behavior from Boston University's Graduate School of Management. She earned a M.Ed. in organizational development at the University of Massachusetts at Amherst and a BA in English from Case Western Reserve University.

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Related Resources from The Conference Board

Additional publications

The Conference Board Human Capital in Review™:

Focus on Diversity and Inclusion (bi-annual)

Vets Returning to the Workforce Executive Action 415, October 2013

The Pillars of Employee Resource Group Success

Council Perspectives 48, August 2013

Better Together: Advancing Diversity & Inclusion through

Analytics and Strategic Workforce Planning

Executive Action 403, June 2013

New Career Models That Can Support Your Diversity and

Inclusion Program

Council Perspectives 47, June 2013

Councils and Academies

Asia-Pacific Human Resources Council

Asia-Pacific Talent & Diversity Council

Chief Human Resources Officers Council I/II

Corporate Well-Being & Strategic Health Leadership Council

China Human Resources Council

Council for Diversity in Business

Council for Division HR Leaders

Council for Mid-Market Human Resources Executives

Council of Global Diversity & Inclusion Executives

Council of Human Resources Executives

Council of Talent Acquisition Executives

Council of Talent Management Executives I/II

Council of US Diversity & Inclusion Executives

Diversity & Inclusion Leadership Council

Emerging Markets Human Resources Council

Executive Council for Talent and Organization Development

Global Human Resources Council

Global Social Investing Council

HR Operations Council I/II

Human Resources Council - Mexico

Onboarding Talent Council

South Asia Human Resources Leadership Council

Talent Management Leaders Council

The Diversity & Inclusion Academy

Conferences

The Annual Corporate Diversity and Inclusion Conference
The Annual Talent Management Strategies Conference

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