

## Case 7: Diversity, Equity & Inclusion Metrics

Aalia identifies as a Canadian, Black, Muslim woman. She has worked as a senior accountant for the past ten years and has recently quit her job as manager at a large accounting firm because she was constantly experiencing microaggressions that affected her mental health. She made a formal complaint to Human Resources about a situation with a manager that resulted in no change. This negative experience left her feeling isolated. After suffering a year of anxiety, she decided to quit and find a more inclusive work environment.

In today's job market, more and more employers are showing their dedication to diversity, equity, and inclusion, and Aalia is certain that she can find a workplace that will be conducive to supporting her mental health. She spent a lot of time updating her résumé, applying for jobs, and researching companies of interest. She wanted to be sure she was applying to companies that were truly equitable and put their people first. She went to company websites to learn about their core values, look for diverse representation at the leadership level, and see what initiatives they posted.

During this process, Aalia didn't consider job postings that had non-inclusive language. She even refused to apply to a company that asked her to disclose where she attended university. After applying to many job openings, she received calls from three potential employers. Thrilled, she accepted interviews with all three organizations.

The first interview was for a senior accountant position at a mid-sized accounting firm called Da Silva Capital Advisory. They asked her if she would be comfortable with an in-person interview. She agreed, and went to the office for an interview with a man named Ryan. At the end of the interview, Aalia asked Ryan about the firm's inclusion initiatives. Ryan told her that having an inclusive workplace is Da Silva's top priority. He told her about their employee engagement surveys and a yearly training seminar for diversity awareness. "We also have employee resource groups like the Working Group on Indigenous Initiatives."

The second interview was for a senior accountant position at a small-sized accounting firm called BWP Accounting. Aalia spoke with two people, Alyssa and Connor, over Zoom. Once they had gone through the interview questions, they asked her if she had any questions for them. Aalia asked how the firm supports an inclusive workplace. Alyssa and Connor tell her that BWP has an equity group and that approaching their work through an equity perspective is one of this year's priorities. They also tell Aalia that the firm brings in a monthly guest speaker to speak to employees about different social matters. "For example," says Alyssa, "this month we had someone come in to speak about intersectionality in the workplace." "Once a month we also have a team building activity during our update meeting," says Connor. "I find this helps foster a more inclusive work environment." Aalia learns that all town halls start with a land acknowledgement and team leaders are very involved in employee engagement.

The third interview was also over Zoom for a senior accountant position at a mid-sized accounting firm called Underwood Tax & Accounting. Aalia was interviewed by Grace (an Asian woman who would be her supervisor), Matt (a Black man who would be her manager), and Amber (a white

woman who is the HR representative for the firm). They ask Aalia all of their questions and then ask her if she has any for them. Again, Aalia asks about the firm's inclusion initiatives. "We have mandatory diversity training," says Amber, "and quiet spaces at the office that can be used by any employee." "We are also working on a 2SLGBTQI+ initiative to implement gender-inclusive washrooms," says Grace, "and we're in the midst of ensuring that all our workplace policies are inclusive." "What you would see on my team," says Matt, "is that we work to have strong, trusting relationships. We do a lot of team building exercises and have a monthly draw for a new restaurant we all try out together."

Questions:

- (1) What are the strengths and weaknesses of each interview? Who had the most attractive recruitment process for Aalia? Which position should she select based on the interview process?
- (2) What makes a recruitment process inclusive? What aspects of these interview processes may have been exclusive? What does an interview process say about the way an organization manages its recruitment?
- (3) Which firm had the strongest inclusive initiatives? What initiatives could have been improved? Why did Aalia ask about each company's inclusion initiatives?
- (4) Why are employees prioritizing DEI? Could an organization have a strong company culture without DEI? What are some negative outcomes of senior leaders not seeing DEI as one of their core values?
- (5) What is the connection between DEI and organizational values? Why does representation matter? What are some steps a company could take to make DEI a bigger part of their culture?

Additional Resources for Case 7:

- To Build a DEI Program That Works, You Need Metrics (article by Harvard Business Review), [here](#)
- Corporate diversity: If you don't measure it, it won't get done (podcast transcript by McKinsey & Co.), [here](#)
- 9 metrics to help you understand (and prioritize) DEI (blog by Culture Amp), [here](#)
- What Are DEI Metrics? A Look Beyond the Numbers (article by Rasmussen University), [here](#)
- Seven Sets Of Metrics That Will Help You Define And Achieve DEI Goals (article by Forbes), [here](#)

**Source: DEI Case Collection for Professional Accountants, University of Toronto Professional Accounting Centre, 2023, PAC website <https://www.utm.utoronto.ca/pac/case-collections/dei-case-collection-professional-accountants>.**