



Diversity, Equity and Inclusion

Timeline



My experience and credentials

- My passion!
- 12+ years in Human Resources
- SHRM-SCP
- Certified Diversity Executive (CDE, through IDC)
- Certified D&I Professional in ISO 30415

Strategic Plan Execution

- Created in line with the firm's strategic priorities
- Partner approval
- Viewed as a liquid document
- Be specific with your goals
- Determine the appetite for change
- Shared only with stakeholders

Goal Examples

- Annual mandatory firm wide training (qualifies for CPE)
- Mandatory Training for all Partners and Managers
- Partner Group to Identify at least 5 Individuals from underrepresented groups within the firm for role of Partner, Director or Senior Manager
- Review job descriptions to identify potential biases. Include firm's DE&I qualifiers in all job descriptions.
- Take any corrective actions to address equitable pay and adjust associates as deemed necessary.
- Conduct facilitated small group roundtable to capture qualitative insights on Climate Survey outcomes.
- Track semi-annual analysis of firm demographics
- Make annual \$10,000 contribution to accounting programs and organizations with a focus on accounting students from diverse communities.

Road Bumps

- Partner Accountability
- Detractors
- “Too many events”
- Letting emotion get involved
- Finding a balance
- You will make mistakes
- Diversity is limited to available talent
- Change takes time and often it is not easily apparent to associates
- Political/Social Climate

Keep your eyes on the prize. Change takes time and can be scary,
especially for accountants.





Thank you!



(678)218-1313



bailey.maxwell@btcpa.net