The Forum of Executive Women

DEI COMMITTEE • WHITE PAPER

Culture Under Pressure.

Lessons from The Forum's Forging the Path Forward: Workplace Inclusion Innovation Hackathon on advancing women through moments of institutional risk.

INTRODUCTION

In today's cultural climate, women are facing a critical moment and unprecedented challenges. Cultural headwinds are stronger than ever — shaping careers, challenging equity, and influencing workplace culture across every sector.

In Philadelphia, members of the Forum of Executive Women have a unique responsibility to advocate for advancing diversity, equity, and inclusion (DEI) in the workplace and to use our voices to foster a positive culture to ensure all women continue to forge ahead.

With this charge at the forefront, the Forum's DEI Committee created a solutions-driven Workplace Inclusion Innovation Hackathon designed to spark bold thinking and generate real, implementable strategies that elevate women in the workplace. Over the course of two days, both in-person and virtually, over 50 women came together to address the most pressing issues facing women in the workplace today:

- Topic One: Women's Representation, Retention and Exodus from the Workplace
- Topic Two: Taking It to the C-Suite: Culture Commitment and Risk
- Topic Three: Culture Redefined: Policies, Processes and Systems

Using these topics as a springboard, participants in small groups considered real-world, hypothetical scenarios, analyzed relevant issues, and created actionable strategies. Those scenarios, and the questions considered, are set forth in the Appendix.

This white paper compiles and captures the thoughtful, expert contributions of those discussions.

With this shared insight, we hope to equip you with new tools and strategies to build cultures of inclusion, equity, and access for women. Together, we are a force to advance conversations and tackle challenges, both inside the workplace and outside in the community, and continue to forge the path forward.

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FOUNDATION

3x

Men entered the workforce at triple the rate of women in 2025 (572,000 vs. 184,000)

91,000

Women aged 20 and over exited the labor force in 2025, while 10,000 men joined

7.3%

Unemployment rate for Black women by early 2026, nearly double the rate of white men

The landscape of the American workforce has undergone a seismic shift since January 2025. After a period of steady progress, women have been met with a sharp, systemic reversal. The data is sobering. Throughout 2025, men entered the workforce at triple the rate of women.

According to the U.S. Bureau of Labor Statistics data analyzed by the National Women's Law Center, in December 2025 alone, 91,000 women aged 20 and over exited the labor force while 10,000 men joined. During the same period, women, and in particular women of color, accounted for the overwhelming majority of job losses. Bureau of Labor Statistics data analyzed by the Economic Policy Institute reveals that by early 2026, the unemployment rate for Black women climbed to 7.3%, nearly double the rate of white men. Also during this period, more than 100,000 Black women were pushed out of the labor market due to a combination of federal layoffs and the dismantling of DEI initiatives. Consistent with these changes, a 2025 Women in the Workplace survey of more than 400 women found that 79% believed that federal attacks on DEI negatively impacted their career opportunities. These trends signal more than just a temporary setback; they represent a deepening structural vulnerability for women, particularly those at the intersection of multiple marginalized identities.

Research shows that attention to DEI in policy and practice pays dividends to employees, profit, and the public good, and supports women and other marginalized groups. Studies show that organizations with more gender diversity in leadership are better for employees, better for customers, and better for society. According to the Human Rights Campaign's Corporate Equality Index data, companies leading on LGBTQ+ inclusion consistently outperform their peers, reporting net income more than eight times higher than companies with lower scores. Successful efforts require leadership commitment, transparency, clear communication, and consistent policies that set clear goals for representation, recruitment, mentoring, skills training, promotion, and retention. Companies that retain DEI teams consistently hire a workforce that reflects the demographic changes in the United States. This commitment is crucial for long-term growth. It also leads to higher employee satisfaction, especially among women and employees of color. In spite of this, many organizations have been adjusting their programs to avoid litigation and have dropped long-term investments in programs that research demonstrates promote substantive equity.

Even though DEI programs can make a difference and have led to forward momentum in the workforce, even before 2025, DEI initiatives offered only limited progress. Recent articles in the Wall Street Journal highlight the performative nature of corporate DEI policies at some S&P 500 companies over the past 10 years. As of 2023, gains in board representation by women and people of color had reverted to 2016 levels, while the representation of women and people of color in senior management roles remained stagnant or barely increased between 2020 and 2023. A Stanford Report study of 315 public companies that faced DEI controversies between 2008 and 2022 found a similar lack of upward pipeline and significant churn — a gap between what companies say and do that researchers called "DEI washing." In light of the stark changes since 2025, it is likely that the gap is growing. DEI alone is not the answer.

The McKinsey "Women in the Workplace 2025" report found that only half of companies are now prioritizing women's career advancement, a multi-year low that correlates with a decline in formal sponsorship and remote work flexibility. In this climate of increased institutional resistance, and the erosion and performative nature of DEI measures, the development and promotion of new, proactive strategies to support women in the workforce is essential. Persistent inequities in hiring, promotion, and occupational segregation, particularly for women of color, underscore the need for new approaches that address structural barriers.

This moment calls for new, reimagined ways of supporting and advancing women in the workforce.

EXECUTIVE SUMMARY

This white paper examines how organizational decisions about culture, inclusion, and risk, expressed through policies, systems, and leadership behavior, shape workforce experiences and disproportionately affect women, particularly women of color, with lasting implications for performance and sustainability. Across industries and institutional contexts, it is clear that when leaders respond to uncertainty by retreating from values or narrowing inclusion efforts, the consequences overall include accelerated attrition, weakened leadership pipelines, diminished trust, and increased operational and reputational risk.

SCENARIO ONE

The Elwin Green Operations Council

Illustrates how fear-driven "compliance in advance" leads to the dismantling of inclusion infrastructure and can trigger a disproportionate exodus of women. As career pathways, mentorship, and psychological safety erode, women exit at alarming rates, weakening leadership succession, recruiting effectiveness, board diversity, and funder confidence. The scenario demonstrates that perceived short-term risk mitigation can create deeper long-term exposure, and that recovery requires visible leadership accountability, acknowledgement of missteps, re-engagement of internal champions, rebuilding promotion and advancement systems for women, and transparent communication that restores trust through action.

SCENARIO TWO

The Financial Employer Conundrum

Highlights the tension leaders face between legal risk aversion and the need to sustain inclusive culture as a business imperative. This scenario underscores the importance of clearly defining and distinguishing actual versus perceived risk, grounding decisions in data and law, and reframing inclusion as integral to performance, retention, and client trust. Organizations that frame inclusion as integral to performance and core values are better positioned to retain talent and withstand scrutiny.

SCENARIO THREE

The University Merger

Expands the definition of culture beyond norms and behaviors to include policies, benefits, processes, power dynamics, and systems that shape daily experience. The scenario illustrates that culture is expressed through tangible organizational choices — how flexibility is granted, how benefits are harmonized, how equity is safeguarded, and how tradeoffs are explained. Equity and inclusion do not happen by default; they must be intentionally designed into organizational systems to ensure everyone feels they belong.

"Culture is not a messaging exercise or a set of isolated initiatives. It is revealed in how organizations allocate resources, make tradeoffs, and act under pressure."

Taken together, this work reinforces a consistent conclusion: culture is not a messaging exercise or a set of isolated initiatives. It is revealed in how organizations allocate resources, make tradeoffs, and act under pressure. Leaders who ground decisions in mission, data, and values; invest in trust and psychological safety; and design systems that equitably support women are better positioned to retain talent, sustain performance, and build resilient organizations in an increasingly complex environment.

01

HYPOTHETICAL ONE

The Elwin Green Operations Council

How "compliance in advance" dismantles inclusion infrastructure — and what it costs.

HYPOTHETICAL ONE

"The Elwin Green Operations Council"

Across industries, organizations are experiencing a marked increase in the departure of women from the workforce, with women of color leaving at particularly high rates. These exits are rarely driven by a single factor; instead, they reflect accumulated signals about diminished opportunity, lack of psychological safety, unclear career pathways, and cultures that no longer feel equitable or supportive. When women leave, especially those in mid-career and leadership pipelines, the impact extends well beyond representation, weakening institutional knowledge, execution capacity, leadership succession, and organizational credibility.

HYPOTHETICAL SYNOPSIS

The Elwin Green Operations Council (EGO), a federally funded organization with 2,500 employees, successfully diversified its workforce and board five years ago, leading to increased productivity and influence. In 2025, however, EGO dismantled key inclusion initiatives out of fear of potential federal funding cuts — a move that has since backfired. More than one-third of women in the critical 3–8 year tenure range have resigned, with even higher attrition among women of color. Leadership is at a crossroads between perceived funding risk and the retention of women essential to its mission and future effectiveness.

Discussion Points and Considerations

Advance Capitulation Undermines Trust:

"Complying in advance" creates more harm than protection. Retreating before being legally required to do so signals fear-based leadership and gives implicit permission for behaviors and attitudes misaligned with organizational values.

Leadership Failure and Performative Action:

When an organization is quick to retreat from culture work, prior inclusion efforts are viewed as performative, rather than deeply held values.

Leadership and Board Accountability Are Central:

Trust repair cannot occur without visible accountability at the highest levels. In some cases, leadership change may be necessary to signal seriousness.

Culture Is Defined by Actions, Not Statements:

Rebranding language, scrubbing websites, or changing terminology without substantive change is experienced as disingenuous.

Talent Loss Has Long-Term Consequences:

Departure of women and underrepresented leaders weakens recruiting pipelines, reduces institutional knowledge, and damages an organization's brand.

Risk Is Multi-Dimensional:

It is problematic when legal and funding risks are weighed more heavily than cultural, reputational, and operational risks. Retention, productivity, engagement, and long-term performance risks are equally real, and measurable, even if they are less immediate.

Trust Repair Requires More Than Listening:

Listening sessions, surveys, and focus groups are insufficient without visible action. Employees are watching for concrete signals such as changes in leadership behavior, decision-making, and power structures, not just renewed messaging.

Economic vs. Moral Case:

While DEI is "good business," there is exhaustion over having to make an economic case for what is essentially a matter of human dignity and ethics.

Strategies / Actions to Implement

RE-ANCHOR IN MISSION AND VALUES

- Recommit clearly to the organization's mission and values, explicitly acknowledging where actions fell short, particularly with respect to women and women of color.
- Name the misalignment between stated values and fear-based decisions, and outline a principled course correction.
- Reinforce that inclusion and equity are not discretionary initiatives, but core to mission execution, credibility, and long-term success.

ESTABLISH VISIBLE LEADERSHIP ACCOUNTABILITY

- Start at the top: trust cannot be restored without visible, impactful changes in senior leadership.
- Ensure senior leadership and the Board model the behaviors and commitments expected across the organization.
- Where necessary, implement leadership changes or public accountability mechanisms tied to culture and inclusion outcomes.

REPAIR INTERNAL AND EXTERNAL TRUST

- Acknowledge the mistake openly through an "engagement tour" with live, facilitated meetings.
- Engage remaining DEI talent and internal "champions" as ambassadors to help lead the rebuild.
- Recognize that trust repair requires sustained action, not one-time messaging or listening exercises.

REBUILD CREDIBILITY THROUGH ACTION, NOT REBRANDING

- Avoid superficial language changes or rebranding that dilute intent or signal retreat.
- Demonstrate commitment through tangible actions, including restoring promotion pathways for women, ensuring diverse leadership representation, and embedding inclusion into core business practices.
- Make visible, operational changes that employees can experience, not just statements they are asked to believe.

RE-ENGAGE AND SUPPORT REMAINING TALENT

- Provide targeted support and recognition to those continuing to carry cultural and operational load.
- Address burnout and disengagement risks among those who stayed.

ADDRESS TALENT LOSS DIRECTLY

- Make amends with women who have left through outreach, career counseling, or targeted re-recruitment.
- Treat reengagement as a ROI decision, recognizing the cost of lost institutional knowledge, leadership pipeline erosion, and weakened employer brand.

STRENGTHEN RECRUITING AND ADVANCEMENT SYSTEMS

- Modernize recruiting with AI tools to ensure inclusive language and salary transparency.
- Broaden candidate profiles by focusing on transferable skills.
- Review job descriptions, hiring criteria, promotion pathways, and performance systems to ensure they expand access to opportunity.

FOCUS ON WOMEN OF COLOR WITHOUT RAMIFICATIONS

- Move beyond representation to power-sharing.
- Address middle-management issues through targeted training and competency development to ensure equitable promotion and evaluation practices.
- Undergird DEI talent by standing firm against pushback.

SHIFT FROM FEAR-BASED TO VALUES-BASED RISK MANAGEMENT

- Define risk holistically, balancing legal and funding considerations with cultural and performance impacts.
- Avoid “compliance in advance” by grounding decisions in data, law, and mission alignment rather than speculation or fear.

SUSTAIN AND DIVERSIFY FUNDING SOURCES

- Stay anchored to the organization’s core mission, which naturally attracts funders who share those goals.
- Reduce over-reliance on federal funding by strategically expanding state, local, and private funding sources.
- Update storytelling to demonstrate how a diverse and inclusive workforce directly drives mission impact, performance, and success.

CONTROL THE NARRATIVE THROUGH TRANSPARENCY

- Develop a clear, honest communication strategy explaining what happened and how the organization is moving forward.
- Highlight past successes achieved during periods of stronger inclusion as evidence of effectiveness.
- Normalize resistance and create a cultural movement that encourages core values and marginalizes bad behaviors, effectively "bringing shame back" for those who dismiss or devalue colleagues.

CONCLUSION — HYPOTHETICAL ONE

> Culture is not tested when it is easy; it is revealed under pressure, particularly in how organizations support and retain women. When fear drives decisions that erode opportunity, safety, and fairness, women, especially women of color, are often the first to disengage or leave, creating damage that far outlasts the moment of risk. Sustainable recovery requires courage, accountability, and a recommitment to inclusion as a core driver of performance, trust, and long-term success, recognizing that retaining women is not only a values issue but a critical determinant of organizational resilience and leadership continuity.

02

HYPOTHETICAL TWO

The Financial Employer Conundrum

Balancing legal risk aversion against inclusion as a business imperative.

HYPOTHETICAL TWO

"The Financial Employer Conundrum"

Organizations, particularly in regulated and high-scrutiny industries, are navigating a complex and evolving landscape around inclusion, equity, and culture initiatives. As legal, political, and reputational pressures increase, leadership teams often face internal tension between risk aversion and the desire to maintain inclusive practices that support performance, retention, and long-term value.

HYPOTHETICAL SYNOPSIS

The leader is responsible for DEI efforts for a large, national organization in the finance industry with over 20,000 employees. The organization faces a complex challenge as it re-evaluates its inclusion, equity, and diversity practices amid heightened legal, regulatory, and cultural scrutiny. Leadership is divided between risk-averse stakeholders advocating for a pullback in DEI investment and those who view these efforts as essential to business performance, talent retention, and alignment with the company's mission and values. The central issues include assessing and defining actual versus perceived legal and reputational risk, determining how to sustain inclusive practices without increasing exposure, maintaining employee trust and engagement during uncertainty, and balancing the expectations of multiple stakeholders, including employees, clients, regulators, and the Board, while ensuring that culture initiatives remain credible, compliant, and strategically aligned with long-term business objectives.

Discussion Points and Considerations

Risk Must Be Clearly Defined and Shared:

Risk is not singular; it may include legal exposure, regulatory compliance, reputational harm, employee retention, productivity, and cultural erosion. Organizations must distinguish between perceived risk and actual risk.

Business Justification Is Critical:

Culture and inclusion initiatives are most defensible when clearly connected to business outcomes such as revenue, recruitment, retention, engagement, and client trust.

Language, Naming, and Framing Matter:

While rebranding or shifting terminology may reduce scrutiny, leaders must be deliberate in ensuring shifts in language do not signal retreat or erode trust.

Employees Are Key Stakeholders:

Employees closely watch how organizations respond to uncertainty. Pullbacks, silence, or unclear messaging can create disengagement and attrition.

Leadership Courage and Consistency Are Tested:

Leadership credibility is built not just on compliance, but on consistency between stated values and observed behavior.

Stakeholder Complexity Requires Thoughtful Navigation:

Boards, regulators, clients, employees, and the public may hold differing expectations. Collaboration with peer organizations can help reduce isolation.

Strategies / Actions to Implement

GROUND DECISIONS IN DATA AND LAW

- Assess legal requirements and intent, not just surface-level interpretations.
- Use data from comparable organizations, industry benchmarks, and internal metrics (assessment data, retention, engagement, productivity) to inform decisions.
- Clearly define organizational risk tolerance across legal, financial, and reputational dimensions.

REFRAME INCLUSION AS BUSINESS NECESSITY

- Tie inclusion efforts directly to revenue, client outcomes, retention, and performance.
- Position initiatives as supporting the organization's mission, values, and strategic objectives, not as standalone programs.
- Ensure leaders can articulate the "why" in business terms.

MAINTAIN THE WORK WHILE ADJUSTING THE FORM

- Where needed, adapt language or structure without abandoning substance.
- Ensure programs remain accessible and inclusive to all employees, even if terminology evolves.
- Avoid symbolic rollbacks that undermine trust while providing little actual risk reduction.

STRENGTHEN COMMUNICATION AND TRANSPARENCY

- Communicate early, clearly, and consistently, especially during periods of uncertainty.
- Explain decisions, tradeoffs, and rationale to employees to reduce speculation and cynicism.
- Reinforce that culture work is ongoing, even as the organization adapts.

BUILD INTERNAL ADVOCACY AND SPONSORSHIP

- Identify executive sponsors and cross-functional allies across legal, HR, and compliance.
- Equip advocates with data, legal grounding, and business-aligned messaging to reduce personal and professional risk.

COLLABORATION WITH LIKE-MINDED COMPANIES

- No company should navigate the DEI landscape solo — peer collaboration is both a risk management and a momentum strategy.
- Identify similarly situated organizations and build informal peer networks to share approaches.
- Engage relevant industry associations and coalitions.

INVEST IN TRUST AND PSYCHOLOGICAL SAFETY

- Create mechanisms for employee feedback, including anonymous channels where appropriate.
- Ensure concerns raised lead to visible action or explanation.
- Reinforce that speaking up is safe and valued, especially during change.

CONCLUSION — HYPOTHETICAL TWO

> Inaction, over-correction, or silence carries its own measurable risks. Leadership requires doing the right thing, not simply the politically convenient thing. The goal is not to abandon DEI programs but to sustain and evolve them intelligently, anchoring every decision in data, mission alignment, and measurable outcomes. Organizations that take a deliberate, values-aligned, and business-grounded approach that integrates legal compliance and cultural integrity are better positioned to navigate uncertainty, retain talent, and sustain long-term performance, regardless of how external conditions evolve.

03

HYPOTHETICAL THREE

The University Merger

Culture lives in policies, benefits, and systems — not just stated values.

HYPOTHETICAL THREE

"The University Merger"

Organizational culture is often narrowly defined as shared norms, behaviors, or "how things feel," but in practice it is shaped just as much by policies, benefits, decision-making processes, leadership behaviors, and the systems that determine who has access, flexibility, and opportunity.

The scenario below demonstrates that culture is embedded in the tangible (and intangible) systems, processes, and policies that create employee experience in an organization.

HYPOTHETICAL SYNOPSIS

The merger of two regional universities, while strategically sound from an academic and financial perspective, has created significant cultural, policy, and operational disruption across faculty, staff, and students. Long-standing differences in institutional norms, particularly around flexibility, benefits, decision-making, and inclusion, have generated uncertainty, loss of identity, and perceptions of winners and losers, creating cultural fault lines. The core challenge is not structural integration, but cultural integration: how to create a shared set of values and equitable ways of working without defaulting to one legacy institution's norms or erasing the identities that drew people to each institution in the first place. Without intentional intervention, these dynamics threaten trust, retention, belonging, and ultimately the success of the merger itself.

Discussion Points and Considerations

Culture Is Central to Identity:

Faculty, staff, and students chose their institutions based in part on culture, autonomy, and values. When changes are experienced as losses, trust erodes quickly.

Power Imbalances Must Be Acknowledged:

In mergers, one institution is often perceived as more dominant. If left unaddressed, these perceptions fuel resentment and resistance.

Flexibility Is a Defining Flashpoint:

Remote and hybrid work policies are interpreted as signals of respect and equity. Equity must be framed as role-based fairness rather than sameness.

Benefits and Performance Systems Signal Value:

Healthcare, caregiver leave, pay, and performance frameworks are tangible expressions of institutional priorities.

Inclusion Cannot Be Delayed:

Uncertainty around student affinity groups and belonging initiatives communicates that inclusion is negotiable. Delays, especially when driven by donor or administrative hesitation, damage trust and student retention.

Listening Without Action Creates Cynicism:

Surveys and town halls only build trust if feedback clearly informs decisions. Transparency about what cannot change is as important as responsiveness to what can.

Leadership and Board Behavior Shape Culture:

Culture is formed more by leadership actions than by strategy documents. Board alignment, particularly around whether the merger is financially or mission driven, directly influences how decisions are interpreted and received.

Strategies / Actions to Implement

CO-CREATE SHARED CORE VALUES

- Conduct structured listening with faculty, staff, students, and leadership from both institutions.
- Develop 3–5 shared core values that honor legacy strengths and position the merger as the creation of a new institution.

DEFINE AND MEASURE SUCCESS AT 12 MONTHS

- Establish baseline metrics for enrollment, retention, engagement, and belonging.
- Implement short feedback loops and publicly share key themes, actions taken, and constraints to demonstrate follow-through and accountability.

BUILD EQUITY SAFEGUARDS AROUND FLEXIBILITY

- Assess flexibility on a role-based basis, tied to outcomes and operational needs.
- Where remote work is not feasible, provide alternative forms of flexibility through scheduling, benefits, or workload adjustments.
- Benchmark flexibility decisions against peer institutions to ensure competitiveness and fairness.

PROTECT ACCESS TO AFFINITY GROUPS

- Standardize funding, advising, and governance for student organizations early in the integration process.
- Separate donor influence from identity-based programming to prevent erosion of belonging and trust.

USE LISTENING AS A TRUST-BUILDING TOOL

- Deploy a mix of town halls, focus groups, and anonymous feedback mechanisms.
- Close the loop consistently by communicating what was heard, what actions are being taken, and why some changes are not possible.

LEVERAGE NARRATIVE AND STORYTELLING

- Honor legacy traditions and publicly acknowledge the contributions of both institutions.
- Use storytelling to connect past identities to a shared future purpose, providing emotional continuity alongside structural change.

CONCLUSION — HYPOTHETICAL THREE

> There is an overarching need to expand how we define and manage culture, moving beyond surface-level norms or messaging to include the policies, benefits, processes, power dynamics, and systems that shape everyday experience. In moments of significant change, these formal structures become the most visible and consequential expressions of culture, determining whether people feel valued, treated fairly, and able to belong. Organizations that recognize culture as something embedded in how decisions are made, resources are allocated, and tradeoffs are explained are better positioned to build trust, sustain engagement, and create a shared future.

This white paper represents the collective wisdom of over 50 highly experienced executive women business leaders in Philadelphia. We are most grateful for everyone's participation and the leadership of the DEI Committee in creating and guiding the robust and thoughtful conversations that led to the output of this resource.

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APPENDIX

<u>**"The Elwin Green Operations Council"**</u>

The Elwin Green Operations Council ("EGO") is an organization with 2500 employees working to promote and expand the use of green energy throughout the United States. After many years of effort and with the help of its DEI consultant, about 5 years ago EGO successfully diversified its board and workforce. EGO credits this work for its increased productivity, greater influence and new funding sources. Although it has a large endowment, it relies mostly on the federal government for its day-to-day operations.

Because leadership feared the federal government would cut funding, early in 2025, EGO considered internal changes to avoid getting in the crosshairs of the Feds. Arguments over these changes were heated and caused significant internal dissention. Ultimately, EGO took action to eliminate all DEI roles internally and externally, dissolve its employee resource groups, end its mentorship programs for emerging leaders, cease outreach for Board roles, and stop on-campus recruiting for new talent.

EGO has continued to receive federal funding. However, in the last 6 months, several problems have emerged, specifically with respect to women at the company:

> 1. Its overall turnover has increased substantially and 35% of women in the 3–8 year tenure range have resigned – nearly triple the rate of male colleagues. Women of color are leaving at even higher rates.
>
> 2. Departing women consistently report themes such as: Lack of a career ladder; Absence of clarity around promotion pathways; A perception that many men are celebrating the change and are openly dismissive and more demanding of their female colleagues; and; Microaggressions and subtle bias in meetings and evaluations.
>
> 3. Recruitment efforts are not yielding interest from high caliber of talent as in the past.
>
> 4. EGO has also been unable to recruit women for the 3 vacant seats on its Board. These seats were vacated last spring when 3 women left in protest to the changes, leaving the board overwhelmingly male.
>
> 5. Due to division within leadership, decision making is much more challenging at EGO, limiting expansion potential.

Recently, state and private funders have suggested that if these problems are not addressed, funding will be discontinued. Employees are calling for a reversal of the last year's changes.

Leadership must decide how to respond. They face conflicting considerations:

- Preserving federal funding so that EGO can continue to expand its influence and avoid job cuts;
- Diversifying and expanding its funding among state and local governments and private corporations and foundations;
- Fear of media scrutiny and loss of reputation;
- Continued loss of talent;
- Dissention among leadership who are divided about how it should be run.

They are revisiting the changes they made, knowing their decisions could shape EGO's reputation, ability to fulfill its mission, and future workforce over the next decade.

Using the Scenario Specific Questions below, draft the strategy you will deploy. Be sure to include specific actions to take, ways to measure success (quantitative and/or qualitative), methods to balance competing interests, and how you will assess and manage risk.

Scenario Specific Questions to Address:

- What does the company do to recruit and retain women from all backgrounds?
- What, if any, support should EGO offer to women who have left the company, taking ROI into account?
- How can the company repair trust internally and externally?
- How can EGO utilize its recent successes to get in front of media scrutiny and control the company's narrative as it works to fulfill its mission and sustain its reputation into the future?
- In light of the company's competing priorities around women how do they sustain and/or diversify funding sources?
- Regarding competing priorities how does the company focus on women of color without ramifications?

"The Elwin Green Operations Council"

You are on the executive leadership team and responsible for DEI for a private, nationwide company in the finance industry with over 20,000 employees. The company's executive team is re-evaluating its Inclusion, Equity, & Diversity ("IE&D") compliance in light of the evolving legal and cultural landscape. It wants to maintain its core mission of "helping people make confident financial decisions through thoughtful, personalized advice, while fostering a culture of integrity, collaboration, and accountability," while navigating heightened scrutiny around IE&D. However, there is a disconnect within the leadership team between those who are risk averse and want to pull back in investment in IE&D and those who understand its importance to business performance and want to push forward.

The employer's IE&D policies and practices currently include the following:

- Affinity Groups
- Implicit Bias Training
- Mentorship Program
- Cultural Heritage Celebrations
- Recruitment and Hiring Practices

Using the Scenario Specific Questions below, draft the strategy you will deploy. Be sure to include specific actions to take, ways to measure success (quantitative and/or qualitative), methods to balance competing interests, and how you will assess and manage risk.

Scenario Specific Questions to Address:

- What are the risks, business justifications, and data points you need to consider regarding the IE&D programs and how to move forward?
- How can the company collaborate with other companies with similar goals to drive progress and success (think Target vs. Costco)?
- You believe there are things you should be doing that the company is not currently engaged in – how can you get buy-in for expanding the focus on IE&D?
- Given your role, how do you best position yourself so that you personally – and your influence at the company – is not in jeopardy by advocating for IE&D?

Scenario Specific Questions to Address (cont'd):

- How will you communicate to employees regarding the company's position on culture? Consider how the core mission is exemplified through the culture work (i.e., affinity groups, implicit bias training, mentoring program).
- What other considerations are relevant – think about employees; customers/clients/reputation; the Board of Directors; compliance/regulators?

<u>"The University Merger"</u>

Two regional universities have merged to strengthen academic offerings and financial sustainability. While the merger promises expanded programs and resources, it has created cultural friction among faculty, staff, and students. You are tasked with helping the leadership of the new, combined university define its culture (each had its own identity and traditions) and design the strategy for structuring and supporting ways of working – and thinking. Complicating matters is that the culture, policies, benefits, and operational processes of each university are not aligned and differ significantly. Some considerations include:

- One campus had flexible remote work policies; the other required on-site presence.
- The performance review processes differ, creating perceptions of inequity.
- Health coverage, tuition remission, and parental leave policies vary widely.
- There are different student advising models, procurement processes and decision-making mechanisms.
- One school values varied student affinity organizations and clubs, the other limits such groups based on administration and donor preferences.

Using the Scenario Specific Questions below, draft the strategy you will deploy. Be sure to include specific actions to take, ways to measure success (quantitative and/or qualitative), methods to balance competing interests, and how you will assess and manage risk.

Scenario Specific Questions to Address:

- How can we create 3–5 combined core values that honor both cultural legacies while setting a new shared identity?
- What does "success" look like 12 months post-merger in terms of belonging and trust?
- What safeguards ensure equity for roles requiring physical presence versus remote-eligible roles?
- Which policies can be phased in or out, and which must be unified immediately, to avoid inequities?
- What funding and advising structures ensure equitable access to affinity organizations and clubs?

ENDNOTES

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