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**Human resource management —  
Diversity and inclusion**

*Management des ressources humaines — Diversité et inclusion*

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ISO copyright office  
CP 401 • Ch. de Blandonnet 8  
CH-1214 Vernier, Geneva  
Phone: +41 22 749 01 11  
Email: [copyright@iso.org](mailto:copyright@iso.org)  
Website: [www.iso.org](http://www.iso.org)

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## Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see [www.iso.org/directives](http://www.iso.org/directives)).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see [www.iso.org/patents](http://www.iso.org/patents)).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see [www.iso.org/iso/foreword.html](http://www.iso.org/iso/foreword.html).

This document was prepared by Technical Committee ISO/TC 260, *Human resource management*.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at [www.iso.org/members.html](http://www.iso.org/members.html).

## Introduction

Developing an inclusive workplace requires an ongoing commitment to diversity and inclusion (D&I) to address inequalities in organizational systems, policies, processes and practices, as well as people's conscious and unconscious biases and behaviours.

In today's increasingly interconnected world, recognizing and leveraging D&I can be critical for organizations seeking to increase innovation, and enhance their resilience, sustainability and reputation. Each organization is different and decision makers need to determine the most appropriate approach for integrating D&I into their strategy and business processes, based on their organizational context. To achieve D&I objectives, organizations need to be brave and committed to actively tackling sensitive issues and addressing non-inclusive behaviours and cultural norms, and unfair and discriminatory organizational practices, whether these are developed by people or associated with technologies.

Fostering a diverse and inclusive organizational culture can enable individuals and teams to thrive and do their best in conditions that enable effective collaboration and participation. Building fairer, more inclusive, socially responsible organizations can help people, regardless of identity, background or circumstance, to access work and develop knowledge, skills and abilities critical to their personal development and well-being.

This document is relevant to the following United Nations Sustainable Development Goals: (5) Gender Equality; (8) Decent Work and Economic Growth; (9) Industry, Innovation and Infrastructure; and (10) Reduced Inequality, and is guided by the principles of human rights at work.<sup>[1]</sup> Additionally, it is linked to ISO 30408.

This document supports organizations to embed D&I in their workplaces (see [Figure 1](#)) by providing guidance and methods on:

- a) prerequisites for demonstrating ongoing commitment to D&I;
- b) accountabilities and responsibilities for D&I;
- c) approaches to valuing diversity and fostering development of an inclusive workplace; and
- d) identifying D&I objectives, opportunities and risks, actions, measures, outcomes and impacts.

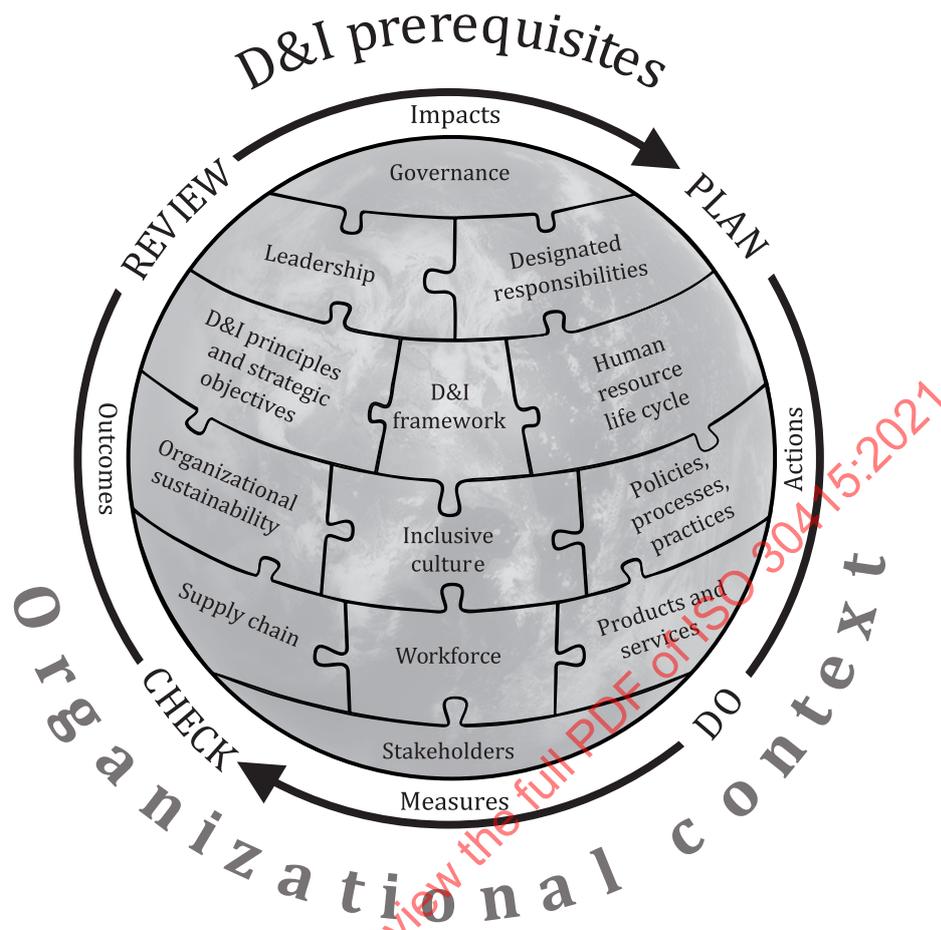


Figure 1 — Organizational diversity and inclusion

This document applies to the human resource management life cycle, delivery of products and services, supply chain relationships, and relationships with external stakeholders to ensure equity, fairness and equality. It encourages organizations to use a continual improvement plan, do, check and review approach. It is intended to help organizations achieve D&I objectives, evaluate the impact on people, communities and society, and meet sustainable development goals. It can also support independent and external validation of organizational approaches to embedding D&I in the workplace. To facilitate the use of this document by organizations, a checklist of the document's D&I actions is included in [Annex A](#).

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# Human resource management — Diversity and inclusion

## 1 Scope

This document provides guidance on D&I for organizations, including their governance body, leaders, workforce and recognized representatives, and other stakeholders. It is intended to be scalable to the needs of all types of organizations in different sectors, whether in public, private, government or non-governmental organizations (NGO), regardless of size, type, activity, industry or sector, growth phase, external influences and country-specific requirements.

This document presents fundamental prerequisites for D&I, associated accountabilities and responsibilities, recommended actions, suggested measures and potential outcomes. It recognizes that each organization is different and that decision makers need to determine the most appropriate approach to embedding D&I in their organization, based on the organization's context and any disruptive challenges that emerge.

This document does not address the specific aspects of relations with labour unions or work councils, or country-specific compliance, legal requirements or litigation.

## 2 Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes requirements of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 30400, *Human resource management — Vocabulary*

## 3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 30400 and the following apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <http://www.electropedia.org/>

### 3.1

#### **accessibility**

extent to which workplace environments, systems, and organizational products and services are accessible and can be used by the broadest range of people

### 3.2

#### **accommodate**

adapt to or adjust to

Note 1 to entry: The aim of accommodating specific needs is to enable people with differing abilities to gain access to work and contribute to the organization.

Note 2 to entry: Adjustments can vary according to differing abilities, specific individual needs and circumstances. For example, having organizational policies that cover making adjustments to premises, working hours, job responsibilities and equipment, and providing accessible information and assistive technologies, as well as time for treatment and rehabilitation, when applicable.

### 3.3

#### **accountability**

obligation of a person or organization to account for their activities or accept responsibility for those activities

Note 1 to entry: The activities can, for example, include the completion of a deliverable or task, and accepting responsibility can involve disclosing the results of the activities in a transparent manner.

[SOURCE: ISO/TS 21089:2018, 3.3.1, modified — Variable characteristics of the concept moved to Note 1 to entry.]

### 3.4

#### **adverse impact**

outcome that is disadvantageous and potentially discriminatory for individuals and groups of people

### 3.5

#### **bias**

tendency, inclination or opinion that is preconceived or unreasoned that hinders impartial judgement

Note 1 to entry: Bias can be unconscious, conscious or systematic.

[SOURCE: ISO 30400:2016, 9.2, modified]

### 3.6

#### **decent work**

work performed in conditions of freedom, equity, security and human dignity

[SOURCE: ISO 26000:2010, 6.4.1.1, Box 8, modified]

### 3.7

#### **diversity**

characteristics of differences and similarities between people

Note 1 to entry: Diversity includes factors that influence the identities and perspectives that people bring when interacting at work.

Note 2 to entry: Diversity can support the development of workplace environments and practices that foster learning from others to gain diverse perspectives on *inclusiveness* (3.12).

Note 3 to entry: Diversity dimensions include the demographic and other personal characteristics of the workforce, for example age, disability, sex, sexual orientation, gender, gender identity, race, colour, nationality, ethnic or national origin, religion or belief, as well as characteristics related to socio-economic context. These are often identified and agreed upon dimensions, which can be associated with legal requirements in different jurisdictions.

[SOURCE: ISO 30400:2016, 9.1, modified — Note 2 to entry modified and Note 3 to entry added.]

### 3.8

#### **employee resource group**

#### **ERG**

people with shared demographic and other *diversity* (3.7) dimensions, and their allies

Note 1 to entry: An ERG generally consists of people who join together in a network to share experiences and beliefs, and to promote diversity and *inclusion* (3.12) in the workplace.

Note 2 to entry: ERGs can contribute to an organization's approach to D&I, and promote, lead and provide support for D&I objectives.

Note 3 to entry: Organizations can support the role and contribution of an ERG by allocating a budget and identifying a leadership team sponsor.

**3.9****equality**

state of being equal, especially in status, rights, opportunities or outcomes

**3.10****equity**

principle that policies, processes and practices should be fairly applied and individual needs recognized

**3.11****fairness**

principle that everyone should be subject to procedures that are equitable and, as far as possible, free from systematic *bias* (3.5)

**3.12****inclusion****inclusiveness**

practice of including all stakeholders in organizational contexts

Note 1 to entry: Inclusion can involve stakeholders from different groups being accepted, welcomed, and enabled to have a *voice* (3.19) and develop a sense of belonging.

Note 2 to entry: Inclusion can also involve offering opportunities to people on the basis of their knowledge, skills and abilities, as well as providing access to resources that enable their participation.

[SOURCE: ISO 30400:2016, 9.5, modified —Note 1 to entry revised and Note 2 to entry added.]

**3.13****inclusive culture**

values, beliefs and practices that influence the conduct and behaviour of people and organizations by including and valuing the perspectives and contributions of the broadest range of stakeholders

**3.14****inclusive behaviour**

conduct that promotes *inclusion* (3.12)

Note 1 to entry: Organizations can enable conditions that encourage inclusive behaviour.

Note 2 to entry: Individuals within an organization demonstrate inclusive behaviour when they enable everyone to have a *voice* (3.19) and accept and value the perspectives and contributions of every stakeholder.

**3.15****intersectionality**

combination of one or more *diversity* (3.7) dimensions and other personal characteristics that are part of a person's identity

Note 1 to entry: These diversity dimensions and personal characteristics intersect, such that each is linked to the other, and influence a person's life and work experiences.

**3.16****onboarding**

process of welcoming people into the organization, its culture, expectations, policies, people and their roles

Note 1 to entry: The approach to onboarding can depend on the type and size of the organization, complexity of the job, and the knowledge, skills and abilities of the person.

Note 2 to entry: Onboarding can help people adjust or acclimatize to a new work environment, role and responsibility, and also help the workforce and the organization to adjust to its new members.

3.17

**organizational governance**

system by which an organization makes and implements decisions in pursuit of its objectives

[SOURCE: ISO 26000:2010, 2.13]

3.18

**outreach**

activities undertaken by an organization to engage with a broader group of stakeholders

3.19

**voice**

way people communicate their views and influence matters that affect them

Note 1 to entry: Voice can include workforce views on employment and organizational issues, which can enable participation and involvement of people in influencing organizational decision-making.

Note 2 to entry: Voice can be evident through formal and informal mechanisms, including engagement surveys, *employee resource groups* (3.8), and consultations and negotiations that involve workforce representatives, labour unions or work councils where they exist.

Note 3 to entry: Voice can include communications from customers, people in the supply chain and other external stakeholders, expressing expectations and concerns.

**4 Fundamental D&I prerequisites**

Collectively, the following prerequisites are fundamental to implementing the guidance in this document, demonstrating commitment to D&I and developing an inclusive organization:

- **Recognizing diversity:** valuing all people intrinsically, individually and as groups, appreciating how different diversity dimensions intersect, and acknowledging that demographic and other personal characteristics can possibly be protected by law and regulation.
- **Governing effectively:** exemplifying and promoting leadership commitment to D&I through the use of inclusive organizational governance systems, policies, processes, practices and operations.
- **Acting accountably:** acting in an ethical and socially responsible manner, promoting productive employment and decent work for all.
- **Working inclusively:** enabling and developing an accessible and respectful workplace environment that fosters inclusion and a sense of belonging.
- **Communicating inclusively:** recognizing and responding to the needs of people who access, understand and relate to communications in different ways.
- **Advocating and championing D&I:** actively influencing and promoting inclusive organizational practices and stakeholder relationships.

**5 Accountabilities and responsibilities**

**5.1 General**

The organization's governing body and senior leadership are accountable for developing D&I principles and objectives, which should be delivered through a D&I framework. The principles and objectives should be aligned with [Clause 4](#) prerequisites, and integrated into the organization's policies, processes and practices, for human resource management, products and services, and supply chain and external stakeholder relationships. They are also accountable for ensuring that resources, time, support and adequate funding is available for D&I initiatives and activities.

D&I responsibility should be delegated to people with expertise and understanding of D&I. People who have delegated responsibilities for D&I, people management and stakeholder relationships are accountable for planning, implementing and monitoring policies, processes and practices, and reviewing their effectiveness in achieving D&I objectives.

Everyone in the organization has a role and responsibility in the realization of D&I principles, and in establishing and maintaining an inclusive culture at work. When people work inclusively, ideas and contributions of all stakeholders are welcomed and respected, which can result in a competitive advantage for the organization.

## 5.2 Organizational governance

To ensure that the organization's D&I principles and objectives are aligned with its vision, mission, values and strategy, its governing body should have accountability for:

- directing senior leaders to establish D&I principles and objectives, and allocation of resources to achieve them;
- demonstrating commitment to D&I and role modelling behaviours that are consistent with D&I principles, shared values and beliefs;
- challenging and addressing behaviour that is inconsistent with D&I principles and ensuring that people who challenge inappropriate behaviour, and those who are affected by it, are protected and supported; and
- holding senior leaders to account when evaluating the organization's D&I opportunities and risks, and reviewing performance and progress in achieving D&I objectives and the impact of their outcomes.

## 5.3 Organizational leadership

The organization's leaders should be active advocates and champions of D&I and have accountability and responsibility for:

- establishing D&I principles and objectives and a supporting framework to realize these;
- facilitating an inclusive organizational culture by establishing D&I expectations and accountabilities, communicating these to all stakeholders, and fostering inclusive relationships and shared values with them;
- demonstrating their commitment by role modelling inclusive behaviour, setting behavioural expectations for the workforce, challenging and addressing inappropriate behaviour, and recognizing and rewarding D&I inclusive practices and behaviours;
- designating responsibility for achieving D&I objectives to those who lead functional areas in the organization;
- ensuring that the organization's systems, policies, processes and practices across all functional areas align with its D&I principles and objectives;
- allocating resources to achieve D&I objectives, for example sponsoring initiatives, ERGs and steering committees, including allocation of time and support for participating and contributing to the achievement of D&I objectives;
- reviewing the outcome and impact of their products and services on market segments and the broadest range of stakeholders; and
- ensuring that the organization's annual report includes a clear narrative description of its D&I opportunities and risks, and progress on achieving D&I objectives, supported by robust evidence and demographic data of its workforce (see ISO 30414 for guidance on human capital reporting).

#### 5.4 Organizational delegated responsibilities for D&I

People who are accountable for managing functional areas of the organization should have delegated responsibility for:

- ensuring that D&I principles are embedded in functional systems, policies, processes and practices;
- sharing D&I knowledge, skills and expertise, and providing advocacy and guidance on policies, processes and practices that promote a diverse and inclusive organizational culture;
- demonstrating and role modelling inclusive behaviours;
- deploying resources to respond to opportunities, risks, constraints and challenges in order to achieve D&I objectives;
- fostering an inclusive and diverse workplace by enabling access and adjustments to increase participation of demographically under-represented groups;
- ensuring policies, processes, practices and decisions about people, as they move into, through and out of the organization, are evidence-based and supported by checks and balances to mitigate the effects of bias, including any in existing and emerging technologies;
- promoting the organization's D&I principles and objectives through all stages of the human resource management life cycle;
- facilitating open channels of communication so that diverse perspectives are received with respect and without prejudice;
- enabling a safe environment for D&I issues, concerns and complaints to be raised, and ensuring policies, processes and practices are fairly applied for all stakeholders, including whistle-blowers;
- ensuring that stakeholder feedback is considered when monitoring the implementation of policies, processes and practices to identify D&I impacts, outcomes, challenges, constraints and trends;
- promoting the organization's D&I principles and objectives through contracting arrangements with the supply chain, relationships with customers and communities, and other external stakeholders;
- identifying and analysing diversity data to measure impacts;
- identifying the criteria and associated measures for D&I that are material to the organization;
- evaluating the impact of policies, processes and practices on the development of an inclusive workplace, including the movement of people into, through and out of the organization, and other stakeholders; and
- reviewing and reporting the status and progress against identified D&I objectives, including the assessment of risk and opportunities, and any recommendations for change and inclusion in the organization's annual report.

#### 5.5 Individual responsibilities

Everyone has responsibility for:

- treating colleagues, customers, suppliers and other stakeholders with respect and fairness;
- meeting expectations of the organization's D&I principles and objectives;
- behaving inclusively, actively fostering inclusion, trust and a sense of belonging; and
- voicing concerns and challenging inappropriate behaviour.

## 6 D&I framework

### 6.1 General

A D&I framework is a supporting structure of interrelated components, which organizations can employ to contextualize, manage and promote inclusion strategically and cross-functionally. An illustration of organizational D&I ([Figure 1](#)), which is used to structure this document, presents a D&I framework as a central component, emphasizing its coordinating function in the context of a plan, do, check, review approach. The D&I prerequisites in [Clause 4](#) are fundamental to the development of an organization's D&I framework, which recognizes its organizational context and the need for alignment with its vision, mission, values, objectives and systems.

An organization's D&I framework can incorporate and articulate:

- D&I principles and objectives;
- accountabilities and responsibilities;
- D&I actions related to, for example, its HR management life cycle, supply chain, products and services, and relationships with external stakeholders;
- valid and reliable quantitative and qualitative measures;
- D&I opportunities and risks, including those related to the use of technologies and automated systems; and
- potential D&I outcomes and impacts on different stakeholders.

Using a framework structure can be an effective way to leverage D&I benefits and demonstrate organizational social responsibility. Designating a leader with accountability for ensuring the maintenance, continual improvement and relevance of the D&I framework is essential to promoting an inclusive organizational culture. For guidance on sustainable employability, see ISO/TR 30406.

### 6.2 Actions

To achieve D&I objectives pertaining to the D&I framework, organizations should:

- designate responsibility for ensuring that the framework is relevant, developed and maintained;
- establish the rationale for D&I;
- ensure organizational leaders articulate their commitment to sponsoring, developing and sustaining an inclusive organization;
- integrate D&I principles and objectives into organizational policies, processes and practices;
- identify D&I measures which are material to the organization and utilize aggregated and segmented workforce and other stakeholder data to assess progress;
- inform members of the workforce about the D&I objectives and opportunities to contribute to them;
- align departmental, group, team and individual objectives to D&I objectives;
- identify, monitor and address D&I risks, challenges and constraints, and optimize D&I opportunities;
- review plans, systems, technologies, policies, processes and practices to ensure that they are fair, equitable and do not adversely impact people, including those related to the use of technologies and automated systems;
- collect data on workforce and other stakeholder perceptions about the organization's commitment to D&I, such as from focus groups, surveys, interviews and external reviews;

- review D&I outcomes and impacts related to the procurement and delivery of goods and services and interactions with external stakeholders;
- regularly review D&I objectives to ensure alignment with the organization's vision, mission and strategy as well as its organizational context; and
- periodically report on progress in achieving the organization's D&I objectives, such as in an annual report. For guidance on human capital reporting, see ISO 30414.

### 6.3 Measures

Examples of measures that can be material to the organization, analysed by aggregate and segmented diversity dimension, include:

- changes in identified D&I opportunities and risk ratings;
- effectiveness of the activities in achieving D&I objectives against baseline data, resource allocation, and identified challenges and constraints;
- effectiveness of organizational involvement with all stakeholders in relation to D&I;
- impact of leadership commitment to D&I on workforce and other stakeholder awareness of D&I objectives and activities;
- accessibility of information and effectiveness of communication methods and mediums;
- trends identified from solicited and unsolicited feedback on D&I objectives and activities;
- the percentage of the workforce that state they feel valued by the organization; and
- the number of reported D&I incidents, such as complaints and grievances.

### 6.4 Outcomes

The following are examples of potential outcomes of an effective D&I framework:

- organizational governing body and leaders demonstrate commitment to D&I, and accountabilities and responsibilities are clearly defined;
- strategic opportunities and risks are identified; implementation priorities are articulated, actioned and monitored;
- individual, department and group D&I objectives support the organization's vision, mission, values and strategy;
- organizational leaders, the workforce and other stakeholders are aware of organizational expectations, participate in implementing D&I activities and support the achievement of D&I objectives;
- policies and practices are fair and equitable, consistently applied and consider the respective needs of the broadest range of people and stakeholders;
- the composition of the workforce at all levels is comparable with demographic profiles in relevant industry sectors, regions and national populations, and is representative of the communities in which the organization operates and serves;
- D&I practices within the supply chain are positively influenced;
- all members of the workforce recognize and contribute to the achievement of D&I objectives;
- evidence of progress in achieving D&I objectives is communicated to the workforce and other stakeholders on a recurring basis, such as in an annual report; and

- the D&I strategy is successfully implemented and results in positive outcomes for the organization, its workforce, customers, supply chain partners and other stakeholders.

## 7 Inclusive culture

### 7.1 General

Inclusive organizational culture is determined by the vision, mission, and strategy set by governance and leadership, and is predominantly influenced by leaders and their approach to developing a diverse and inclusive organization. It is also influenced by D&I principles, values, beliefs, behaviours and expression of the lived experience of the people working for, or on behalf of, the organization. An inclusive organization enables fair and equitable access to jobs, careers, learning and development opportunities, and, through its relations with its workforce and other stakeholders, fosters a sense of connectedness and mutual respect. It is also reinforced through the organization's D&I framework, policies, processes and practices. For guidance on human governance, see ISO 30408.

### 7.2 Actions

To achieve an inclusive culture, organizations should:

- prioritize and promote D&I principles and objectives through communications, engagement and outreach activities, HR life cycle policies, processes and practices, and relationships with all stakeholders;
- ensure ethical and regulatory considerations are applied to collecting, interpreting and using data;
- encourage people to disclose their demographic data by explaining the data will be used to improve systems, policies, processes and practices, and identify and address disparities, and that ethical and regulatory considerations are applied to its collection, interpretation and use;
- provide mechanisms for people to voice their opinions, and make suggestions for change about D&I in the organization, for example in focus groups, surveys, suggestions schemes and other stakeholder feedback methods that foster dialogue and debate;
- communicate behavioural expectations that promote the importance of inclusive, respectful behaviour;
- provide mechanisms to identify, examine and resolve workplace conflict and ensure these are used appropriately to address individual concerns, for example interpersonal interactions and outcomes, bullying, harassment and microaggression, and any form of retaliation;
- seek feedback on the culture at work from individuals, ERGs, focus groups, committees and task groups, workforce representatives, work councils and labour union representatives, where they exist;
- collect data by diversity dimension on workforce health, safety and well-being, including absence, workforce turnover and retention to identify trends and adverse impacts;
- collect data by diversity dimension relating to workplace conflict, such as incidents, disputes, discipline and grievances, complaints of bullying, harassment and microaggression, forms of retaliation as well as resolution outcomes to identify trends and adverse impacts;
- use internal and external, solicited and unsolicited feedback to gain insight into the organization's reputation as an inclusive organization; and
- report on the development of an inclusive organizational culture, workforce composition, D&I opportunities and risks, and action plans.

### 7.3 Measures

Examples of measures that can be material to the organization, analysed by aggregate and segmented diversity dimension, include:

- the effectiveness of D&I communications to determine which methods, formats and channels have the most impact and provide insightful feedback;
- the effectiveness of outreach activities with all stakeholders to ascertain the organization's awareness of its D&I principles and objectives;
- the percentage of the workforce that disclose their personal demographic data;
- changes in the composition of the organization's governance body and workforce;
- the percentage of the workforce that state that they feel valued by the organization;
- data on workforce health, safety and well-being, including absence, workforce turnover and retention to identify trends and adverse impacts;
- data relating to workplace conflict, such as incidents, disputes, discipline and grievances, complaints of bullying, harassment and microaggression, forms of retaliation, as well as resolution outcomes to identify trends and adverse impacts;
- data related to disproportionate and adverse impacts arising from the implementation of organizational policies, processes and practices;
- trends in solicited and unsolicited feedback to ascertain the organization's standing as an inclusive organization and any D&I impacts; and
- changes in the number and levels of D&I risks identified.

### 7.4 Outcomes

The following are examples of potential outcomes of an inclusive culture:

- the organization's D&I principles and strategic objectives support the organization's vision, mission, and values, resulting in positive and measurable outcomes for people and the organization;
- leadership commitment to D&I is demonstrated in behaviours that foster trust and challenge bias and discrimination;
- opportunities are made available to all members of the workforce to achieve their full potential;
- collaboration and knowledge sharing are valued as norms;
- people have a voice, dialogue is encouraged and diverse perspectives are respected and welcomed;
- intersectionality of diversity dimensions is recognized;
- people feel welcomed, have a sense of belonging, contribute and participate;
- improved organizational engagement is reflected in the way people value and respect each other;
- problem-solving and decision-making, creativity and innovation are improved;
- a safer work environment is realized, and incidences of complaints, grievances and risks are identified and addressed;
- the organization has a positive reputation as an inclusive employer and preferred place to work; and
- service provision is improved and relationships with external stakeholders are enhanced.

## 8 Human resource management life cycle

### 8.1 General

The human resource management life cycle is a concept that describes the main stages of an individual's engagement with an organization from the point of joining to leaving. It also describes the organizational responsibilities for people management at each main stage. There are D&I imperatives and implications in the human resource management life cycle, which require a continual improvement approach of planning, doing, checking and reviewing the outcomes and impacts of policies, processes and practices related to all stages of the cycle.

To foster D&I, a principled and strategic approach to human resource management should be founded on trust, fairness, respect and transparency. It should recognize digital transformation, development of algorithms and automation in HR systems, and the potential for bias.

This document identifies the following components of the main life cycle stages:

- workforce planning
- remuneration
- recruitment
- onboarding
- learning and development
- performance management
- succession planning
- workforce mobility
- cessation of employment

### 8.2 Workforce planning

#### 8.2.1 General

Every organization should have a workforce plan that identifies current and future workforce supply and demand, and makes its workforce knowledge, skill and ability requirements explicit. When organizations undertake workforce planning, demographic data are internally and externally sourced, measured and analysed. Role requirements are essential considerations that also support the identification of D&I opportunities and risks. For guidance on workforce planning, see ISO 30409 and ISO/TS 30410.

#### 8.2.2 Actions

To achieve D&I objectives pertaining to workforce planning, organizations should:

- develop a workforce plan that incorporates D&I principles and objectives;
- identify D&I implications of organizational workforce planning strategies, including D&I opportunities and risks;
- ensure the organization's workforce plan identifies job families and roles, knowledge, skills and abilities, required now and in the future, together with identified workforce diversity dimensions;
- collect workforce composition data for comparison with demographic profiles in industries, sectors, regions and national populations;

- compare their workforce demographic profile with external workforce supply and demand data to identify demographic under-representation, D&I opportunities and risks;
- identify inclusion opportunities in the workforce plan, for example progression of people from demographically under-represented groups, flexibility and accessibility considerations, and the distribution of skills and roles; and
- review the outcomes and impacts of workforce planning strategies and activities on becoming a more inclusive organization.

### 8.2.3 Measures

Examples of measures that can be material to the organization, analysed by aggregate and segmented diversity dimension, include:

- data on available workforce supply and demand compared to role requirements and D&I opportunities and risks, including demographic over and under-representation;
- the number of job and progression opportunities identified against the number of placements of people from demographically under-represented groups within specified periods covered by the workforce plan;
- trends in adverse and disproportionate impacts; and
- the effectiveness of strategies and actions on achieving D&I objectives and in addressing opportunities and risks identified in the workforce plan.

### 8.2.4 Outcomes

The following are potential D&I outcomes for workforce planning:

- D&I objectives are articulated in the workforce plan;
- organizational D&I opportunities and risks are identified, addressed and monitored;
- gaps in knowledge, skills and abilities and demographic over- and under-representation are addressed; and
- the organization is able to assess the outcomes of workforce planning in achieving its aim to become a more inclusive organization.

## 8.3 Remuneration

### 8.3.1 General

Remuneration includes pay and benefits people receive, based on their job roles, in exchange for their time, effort and contributions to the organization. Pay can include a fixed amount, such as wages and salary, for doing work over an agreed period of time, plus variable payments such as overtime, performance-related pay, incentives, bonuses and commissions. Pay-setting can be subject to negotiation and collective participation and bargaining arrangements, where they exist. Benefits are non-monetary provisions provided by organizations, such as paid leave, time off for volunteering, retirement benefits, healthcare, flexible work time and childcare vouchers, which have financial value and cost implications. Organizations striving to foster an inclusive workplace should recognize and address pay anomalies and disparities, and implement remuneration policies, processes and practices fairly, equitably and transparently.

### 8.3.2 Actions

To achieve D&I objectives pertaining to remuneration, organizations should:

- incorporate D&I principles and objectives in policies, processes and practices that recognize the value of inclusive workforce participation and collective bargaining where it exists;
- evaluate and benchmark the relative worth and market value of job roles to ensure an equal pay for equal value approach;
- make pay and benefits decisions in a fair, inclusive, equitable and transparent manner;
- align benefits with D&I principles and objectives to foster an inclusive workplace;
- communicate information about pay and benefits in an accessible, inclusive and transparent manner;
- collect data on the outcomes of remuneration policies, processes and practices to identify gender and other diversity-related anomalies and differentials, in and across job families, geographic locations and pay structure, for example bands, grades and scales;
- collect data on the levels of satisfaction or dissatisfaction with pay and benefit processes;
- collect data on pay-decision outcomes, for example, evaluation ratings and percentage of pay change; and
- regularly review and report the outcomes of pay policies, processes and practices to identify diversity-related anomalies and differentials in pay.

### 8.3.3 Measures

Examples of measures that can be material to the organization, analysed by aggregate and segmented diversity dimension, include:

- data on pay and benefits provided to the workforce to identify anomalies and differentials in pay and benefits, in and across job families, geographic locations and pay structure, for example bands, grades and scales;
- reported levels of satisfaction or dissatisfaction about the fairness of the organization's pay and benefits policies, processes and practices;
- reported levels of satisfaction or dissatisfaction about the fairness of the organization's pay and benefits outcomes; and
- number and type of complaints and disputes related to pay and benefits.

### 8.3.4 Outcomes

The following are potential D&I outcomes of remuneration:

- related policies, processes and practices are fair, inclusive, equitable and transparent;
- people are paid based on equal pay for work of equal value;
- identified diversity dimension-related pay anomalies and disparities are addressed; and
- the organization is recognized by stakeholders as an inclusive employer, and for its fair and equitable remuneration policies, processes and practices.

## 8.4 Recruitment

### 8.4.1 General

Recruitment can involve a process of attracting, sourcing, assessing, selecting and employing people with knowledge, skills and abilities required by the organization to meet its workforce planning objectives and remuneration budget. An inclusive organization should use diverse and accessible recruitment channels and outreach activities to broaden its pool of candidates and provide a positive recruitment experience. To meet D&I objectives, various forms of employment opportunities should be offered, such as full-time, part-time, flexible work arrangements, temporary assignments, apprenticeships and internships or contingent work. To attract a diverse workforce, accommodate diverse needs and address socio-economic disparities, organizations should also provide opportunities for demographically under-represented groups and people seeking to return to work after periods of non-working or who need additional flexibility. When deciding which screening, assessment and selection systems to use, organizations should be aware of the potential for bias, including in algorithms and machine learning programmes in automated HR systems. For guidance on assessment service delivery, see the ISO 10667 series; for guidance on recruitment, see ISO 30405.

### 8.4.2 Actions

To achieve D&I objectives pertaining to recruitment, organizations should:

- ensure recruitment strategies and activities align with its workforce plan and D&I principles;
- develop and use transparent, fair and non-discriminatory practices and tools, such as automated HR system algorithms, in recruitment processes, recognizing the potential for conscious and unconscious bias in people and automated systems;
- use outreach activities and diverse and accessible recruitment channels to encourage interest from the broadest pool of people in the communities in which the organization operates and serves;
- use positive images of people from diverse backgrounds and inclusive language in job promotion and advertising communications;
- specify their D&I principles and objectives in contractual relationships with recruitment organizations and other suppliers;
- identify inclusion opportunities in recruitment strategies and activities, such as progression of people from demographically under-represented groups, flexibility and accessibility considerations and the distribution of skills and roles;
- design jobs to include consideration of flexibility, accessibility or adjustments that accommodate specific individual needs;
- ensure job descriptions state the work to be performed and the knowledge, skills, abilities and inclusive behaviours required, or that need to be developed or updated;
- recruit, welcome and be receptive of a diverse pool of people with relevant knowledge, skills and abilities and with different characteristics and identities from various cultural backgrounds;
- provide opportunities for candidates to demonstrate the knowledge, skills and abilities they have and their potential to meet job requirements using valid, reliable and fair selection and assessment methods, which include adjustments that accommodate specific individual needs;
- collect data on each stage of the recruitment process, including outreach and outsourced activities, to identify which sources and channels provide the broadest pool of people to fill positions;
- collect data on the numbers and diversity of people progressing through each stage of the recruitment process, to identify progress made against the objectives;

- collect data to identify opportunities and risks at each stage of the recruitment process to identify bias or discrimination; and
- review the outcomes and impacts of recruitment strategies and activities on becoming a more inclusive organization.

### 8.4.3 Measures

Examples of measures that can be material to the organization, analysed by aggregate and segmented diversity dimension, include:

- the number of people expressing interest in working for the organization resulting from outreach activities;
- the number of people progressing through each stage of the recruitment process, including outsourced activities;
- the number and type of adjustments requested and accommodated;
- the number of complaints, incidents and allegations relating to bias or discrimination;
- the number of offers made compared with the number of acceptances and reasons for non-acceptance; and
- the effectiveness of recruitment strategies, sources, channels, methods and activities at different periods, including workforce turnover and retention data.

### 8.4.4 Outcomes

The following are potential D&I outcomes of recruitment:

- objectives and workforce planning priorities are met;
- the organization recruits and employs people from the communities in which it operates and serves, including those from demographically under-represented groups;
- risks of bias and discrimination in all stages of recruitment, and including the use of automated HR systems, are identified and addressed; and
- people recognize the organization as a fair and inclusive workplace where everyone is valued.

## 8.5 Onboarding

### 8.5.1 General

Onboarding can involve a process of welcoming people recruited into the organization and its culture. It starts when employment commences and continues for a period of time specified by the organization, and includes planned review phases. The purpose is to help people become successful in their roles and teams, address their needs and requirements, and encourage inclusive behaviours. This includes introducing the organization's D&I principles and objectives, people and their roles, and policies, processes and practices. It is a shared responsibility between people with designated responsibilities for D&I and hiring managers. For guidance on quality of hire, see ISO/TS 30410.

### 8.5.2 Actions

To achieve D&I objectives pertaining to onboarding, organizations should:

- design a structured process that incorporates both standard and job-specific requirements, which provides opportunities for open communication and feedback;

- recognize individual requirements regarding work environment, facilities and technologies, and make adjustments that accommodate specific individual needs, for example the needs arising from long-term health conditions and impairment;
- identify and respond to individual learning and development needs, opportunities for progression, and coaching and mentoring requests, for example to address demographic under-representation;
- communicate that everyone has a responsibility in making the organization inclusive, and clarify behavioural expectations that promote the importance of inclusive, respectful behaviour;
- emphasize the importance of the D&I principles and objectives, and how they are integrated into the policies, processes and practices;
- provide information on resources, including how to access helplines, employee assistance provisions and ERGs, where they exist, and where and who to go to for help and support on resolving D&I issues or complaints;
- collect data on the levels of engagement and satisfaction with onboarding;
- collect data to identify and address bias or discrimination;
- collect data on development opportunities offered, for example coaching and mentoring; and
- review the outcomes and impacts of onboarding activities on becoming a more inclusive organization.

### 8.5.3 Measures

Examples of measures that can be material to the organization, analysed by aggregate and segmented diversity dimension, include:

- number of people completing onboarding activities, and their levels of satisfaction;
- number and type of adjustments made that accommodate specific individual needs;
- number of occasions and types of D&I support resources people use, including helplines, employee assistance provisions and ERGs, where they exist;
- number of development opportunities offered and accepted, including coaching and mentoring;
- survey data, or data from other feedback methods, relating to awareness and understanding of the organization's D&I principles, policies, processes and practices;
- number of complaints of bias and discrimination received and addressed;
- the number and reasons for people leaving and staying with the organization, during onboarding and within 6 months of completing it; and
- number of people stating in surveys, or through other feedback methods, that they feel welcomed and included into the organization.

### 8.5.4 Outcomes

The following are potential D&I outcomes of onboarding:

- people feel welcomed, included and valued;
- people's needs and requirements are identified and adjustments that accommodate specific individual needs are met;
- people are aware and understand the importance of the organization's D&I principles and objectives;
- people know how to access policies and resources, including where to go for help and support on harassment, discrimination, retaliation, and whistle-blowing; and

- people demonstrate inclusive behaviour and contribute to achieving the organization's D&I objectives.

## 8.6 Learning and development

### 8.6.1 General

Organizational learning and development activities focus on improving individual, team and organizational performance through enhancing knowledge, skills and abilities. Inclusion should be a core principle of all learning and development. Organizational learning needs can be identified in the workforce plan; individual learning needs can be identified during recruitment, onboarding and performance management reviews. Providing development opportunities in an equitable manner can increase participation, challenge and mitigate bias and prevent discrimination, and enhance individual potential. To foster inclusive behaviour, D&I-focused learning and development should raise awareness of the organization's D&I principles and objectives and lived experiences of others. Formal and informal approaches can include participating in a blend of in-person and online individual, group and on-the-job training, coaching, mentoring, temporary assignments and secondments. For guidance on assessment service delivery, see the ISO 10667 series.

### 8.6.2 Actions

To achieve D&I objectives pertaining to learning and development, organizations should:

- make learning and development available and accessible to all members of the workforce, providing adjustments that accommodate specific individual needs, as required;
- make resources available, for example adequate funding for the use of accessible venues and learning platforms;
- analyse individual and organizational learning and development needs;
- establish programmes that address individual development needs, such as coaching and mentoring;
- integrate D&I principles into learning and development policies, processes, practices and programmes;
- design learning and development activities to increase awareness of D&I principles and foster insight into the benefits of having a range of perspectives, abilities, values and beliefs, and understand the importance of behaving inclusively and respectfully;
- use inclusive imagery, phrasing and examples, and avoid stereotypical language, cultural presumptions and references in learning content and its delivery;
- use inclusive, knowledgeable and experienced trainers, coaches and mentors who reflect a diverse range of perspectives, abilities, values and beliefs, and undertake periodic observations of their practice;
- enable people to develop confidence, courage and intervention skills to challenge and address bias and discrimination;
- provide leadership development on inclusive people management practices; and
- collect data to evaluate the effectiveness and impact of learning and development on individual and organizational outcomes.

### 8.6.3 Measures

Examples of measures that can be material to the organization, analysed by aggregate and segmented diversity dimension, include:

- number of people participating in learning and development activities;
- evaluations of post-activity feedback and levels of satisfaction;
- ratings from independent observations of learning and development activities and people delivering them;
- number and type of adjustments made that accommodate specific individual needs;
- self-reported, peer-reported and line-manager-reported changes in understanding, awareness and behaviour related to D&I principles and objectives;
- data on the effectiveness of learning and development activities and impact on individual performance and inclusive behaviours; and
- evaluations of learning and development activities and their impact on organizational outcomes.

### 8.6.4 Outcomes

The following are potential D&I outcomes for learning and development:

- people understand why the organization's D&I principles and objectives are important;
- inclusion is designed into all programmes, resources, interventions and events;
- people have equal access and opportunity to develop their potential;
- people develop skills and knowledge required to communicate, build relationships and collaborate effectively;
- people develop skills and confidence to recognize, challenge and address bias and discrimination;
- people feel included, demonstrate inclusive behaviour and are empathetic to the lived experiences of others; and
- individual, team and organizational performance is enhanced, and competitive advantage is optimized.

## 8.7 Performance management

### 8.7.1 General

Performance management involves establishing individual performance and behavioural expectations, holding people to account for achieving them, and identifying learning needs and areas for personal development through timely, fair and constructive feedback conversations. When D&I principles and objectives are incorporated into performance management processes, organizations can foster a culture of shared accountability and responsibility. People with management responsibilities should demonstrate inclusive leadership and ensure that team and individual objectives for D&I are identified and met, in the context of continual improvement. Ongoing performance management should encompass recognizing and rewarding inclusive behaviour and addressing biased and discriminatory behaviour. For guidance on assessment service delivery, see the ISO 10667 series.

### 8.7.2 Actions

To achieve D&I objectives pertaining to performance management, organizations should:

- communicate D&I principles and behavioural expectations in performance management policies, processes and practices, to enable people to contribute to developing an inclusive workplace;
- establish performance management criteria to minimize bias in evaluations;
- define performance management objectives for individuals, teams, people managers and those with D&I accountabilities that are aligned with D&I principles and objectives;
- provide constructive feedback on D&I-related performance outcomes, including recognizing inclusive behaviour and challenging and addressing non-inclusive behaviour;
- identify areas for improvement and behaviour that contravenes the D&I principles and objectives and, if necessary, implement progressive and proportionate disciplinary action;
- provide mechanisms for people to express satisfaction or dissatisfaction with the performance management process and its outcomes;
- monitor performance management outcomes to identify potential rater-bias and disparity in the assessment processes;
- collect data on the levels of satisfaction or dissatisfaction with the performance management process;
- collect data on performance management outcomes, for example evaluation ratings, personal development plans for potential advancement and action plans for improvement;
- record and celebrate examples of inclusive behaviour demonstrated by the workforce and communicate them;
- collect data on workplace behaviour that is contrary to the D&I principles and objectives, such as discrimination, bullying, harassment, microaggression and retaliation, and how this is resolved; and
- review performance management processes to ensure that the organization's D&I principles and objectives are embedded, and are fair, impartial, constructive and inclusive.

### 8.7.3 Measures

Examples of measures that can be material to the organization, analysed by aggregate and segmented diversity dimension, include:

- the number of people participating in performance management processes;
- trends in performance management ratings and outcomes, and any adverse and disproportionate impacts;
- reported levels of satisfaction or dissatisfaction about the performance management process;
- reported levels of satisfaction or dissatisfaction with performance management outcomes;
- the number of reported examples of inclusive behaviour; and
- the number of reported examples of behaviour that is contrary to the D&I principles and objectives.

### 8.7.4 Outcomes

The following are potential D&I outcomes of performance management:

- D&I principles and objectives are incorporated into each stage of the process;

- people managers demonstrate inclusive leadership in the development and retention of talent;
- objectives linked to D&I are met, fostering a culture of shared accountability and responsibility among everyone in the organization;
- relationships and experiences between people managers and individuals during evaluations of performance are fair, impartial, constructive and inclusive;
- D&I learning and development needs are identified and addressed;
- bias and discrimination in the performance management process are challenged and addressed;
- behaviours that contravene the D&I principles and objectives are challenged and addressed;
- a sense of belonging and engagement is fostered, and job satisfaction and retention are improved; and
- individual, team and organizational performance is enhanced, and competitive advantage is optimized.

## **8.8 Succession planning**

### **8.8.1 General**

Succession planning is a systematic process that involves considering, selecting, developing and placing individuals in identified job positions that have a direct and significant impact on organizational performance. It involves identifying individuals, either internally or externally sourced, who can demonstrate the requisite knowledge, skills and abilities, as well as inclusive behaviour, needed to fill those positions. A strategic succession plan, based on D&I principles and objectives, should identify a diverse pool of potential successors, ready now or in the future, to assume leadership roles and critical positions. An inclusive succession planning process should also ensure that an internal and diverse pool of people has access to development opportunities to prepare for these positions and expanded responsibilities as they become available.

### **8.8.2 Actions**

To achieve D&I objectives pertaining to succession planning, organizations should:

- incorporate D&I principles in succession planning policies, processes and practices;
- communicate information about succession policies, processes and practices in an accessible, inclusive and transparent manner;
- identify D&I opportunities in succession planning processes and practices, such as evaluating performance management outcomes against succession job opportunities to identify people who are ready for development and succession, or to ameliorate any pay gaps;
- identify D&I risks in succession planning processes and practices, such as the potential for bias when identifying and considering individuals for development;
- enable people to prepare for potential succession into leadership roles or critical positions by promoting opportunities to develop knowledge, skills, abilities and inclusive behaviours;
- ensure that people from demographically under-represented groups are aware of, and have access to, succession opportunities and their development is fostered and supported, for example through mentoring;
- collect data on the levels of satisfaction or dissatisfaction with the succession planning process;
- collect data on each stage of the succession planning process and its outcomes; and
- review succession planning decisions to identify and address any potential bias.

### 8.8.3 Measures

Examples of measures that can be material to the organization, analysed by aggregate and segmented diversity dimension, include:

- the number of people engaged in each stage of succession planning processes;
- the percentage of the workforce identified as potential successors;
- the percentage of the workforce placed in succession positions;
- reported levels of satisfaction or dissatisfaction about fairness in the organization's succession planning policies, processes and practices;
- reported levels of satisfaction or dissatisfaction about fairness in the organization's succession planning outcomes;
- number and type of complaints about the succession planning process; and
- trends in succession ratings and outcomes, and any adverse and disproportionate impacts.

### 8.8.4 Outcomes

The following are potential D&I outcomes pertaining to succession planning:

- succession planning policies, processes and practices are transparent, fair and inclusive;
- a systematic, periodic review process identifies job positions in the succession plan, a diverse pool of internally sourced potential successors, or the need to externally source candidates;
- everyone in the organization is made aware of succession processes and given opportunities to develop their knowledge, skills, abilities and inclusive behaviours;
- personal development plans for people identified as potential successors are effective;
- a diverse pool of potential successors is ready to assume leadership roles or critical positions as they become available; and
- the broadest range of people are represented in succession planning outcomes.

## 8.9 Workforce mobility

### 8.9.1 General

Workforce mobility refers to the policies, processes and practices involved with transferring individuals from one location to another, regionally, nationally or internationally. Work assignments can include temporary assignment projects, secondments and expatriation, inpatriation and repatriation. It is an integral part of workforce planning, recruitment, performance management, learning and development and succession planning. When evaluating such work assignments and potential relocation, organizations should consider the position role, an individual's development and whether the role can be fulfilled remotely because of digital transformation and advances in automation. When the role or individual development necessitates relocation, organizations should ensure that an inclusive, proactive and systematic risk-management approach includes consideration of related flexibility, health, safety, well-being, immigration and other factors.

### 8.9.2 Actions

To achieve D&I objectives pertaining to workforce mobility, organizations should:

- prioritize D&I principles in the design and implementation of policies, processes and practices;

- identify and monitor D&I opportunities and risks involved with periodic work assignments, and projects and secondments that require relocation, such as expatriation, inpatriation and repatriation;
- align work assignments with performance management outcomes and succession plans to develop individual knowledge, skills and abilities and strengthen organizational performance;
- use an inclusive approach to workforce mobility by ensuring that assignments are communicated, accessible and offered fairly based on skills, knowledge and abilities;
- consider the resources and support required to meet potentially challenging aspects of work assignments and relocation;
- recognize and respond to individual and family circumstances that can influence decisions to accept or decline the work assignments and relocation;
- ensure that individuals who decline a workforce mobility offer are considered for future assignments or alternative methods of undertaking and completing work assignments without detriment;
- consider alternative methods of undertaking and completing work assignments without relocation, for example by working remotely and using technology;
- assess the return on investment of either relocating individuals or deploying alternative methods to undertake and complete work assignments;
- collect data on the levels of satisfaction or dissatisfaction with workforce mobility policies, processes, practices and outcomes; and
- review workforce mobility decisions to identify and address any potential bias and demographic under-representation.

### 8.9.3 Measures

Examples of measures that can be material to the organization, analysed by aggregate and segmented diversity dimension, include:

- the percentage of the workforce who accepted or declined workforce mobility opportunities, including reasons for declining;
- the impact and effectiveness of work assignments with and without relocation;
- trends in workforce mobility outcomes and any adverse and disproportionate impacts;
- number and type of complaints about workforce mobility processes; and
- reported levels of satisfaction or dissatisfaction about fairness in the organization's workforce mobility policies, processes, practices and outcomes.

### 8.9.4 Outcomes

The following are potential D&I outcomes of workforce mobility:

- policies, processes, practices and work assignment outcomes are transparent, fair and inclusive;
- everyone in the organization is made aware of workforce mobility policies and opportunities;
- work assignments enable individuals to develop knowledge, skills, abilities and inclusive behaviours to progress;
- individual and organizational opportunities and risks related to workforce mobility and work assignments are identified and addressed; and
- the broadest range of people are represented in work assignment outcomes.

## 8.10 Cessation of employment

### 8.10.1 General

Cessation of employment refers to the end of an individual's employment with an organization, either voluntarily or involuntarily, through resignation, retirement, redundancy or severance, performance-related or conduct reasons, and ill health or death. Organizations should adopt a structured approach to ending employment, for example, by providing information, access to support services and resources, consultation and appeal mechanisms, and feedback channels. Recognizing that the end of employment can be challenging and stressful for some individuals, policies, processes and practices that end employment should be transparent, implemented impartially, sensitively and respectfully, and with due regard to confidentiality, health and well-being.

### 8.10.2 Actions

To achieve D&I objectives, the organization's approach to cessation of employment should include:

- incorporating D&I principles in cessation of employment policies, processes and practices;
- ensuring that the end of employment is managed with due care and attention, taking into consideration the potential impact on people, for example their health, safety and well-being;
- considering adjustments that accommodate specific individual needs, for example redeployment to alternative work or flexible working arrangements, before terminating employment due to ill health or capability;
- ensuring criteria for redundancy and severance are non-discriminatory;
- providing access to information, support services, opportunities to discuss concerns, consultation and appeal mechanisms, and, where they exist, support from workforce representatives and unions;
- collecting data by diversity dimension on workforce turnover and attrition, resulting from resignation, retirement, redundancies and dismissals;
- collecting solicited and unsolicited feedback, for example exit interview data, social media and other external media, to ascertain the organization's reputation as an inclusive employer and identify potential bias and discrimination;
- recognizing the contributions people have made to the organization, for example by advocating for D&I, role modelling inclusive behaviour, and service milestones and achievements;
- providing channels that enable people to remain connected to the organization and maintain relationships with colleagues after their employment is ended;
- investigating and resolving complaints of bias and discrimination in decision-making processes; and
- evaluating the impact of cessation of employment policies, processes and practices on workforce diversity to identify any disproportionate and adverse impact.

### 8.10.3 Measures

Examples of measures that can be material to the organization, analysed by aggregate and segmented diversity dimension, include:

- trends in turnover and retention data;
- trends in solicited and unsolicited feedback on cessation of employment processes;
- exit interview data to ascertain positive outcomes and adverse impacts resulting from cessation of employment processes;

- the number of requests for alternative or flexible working arrangements, or other adjustments, and how they were addressed and accommodated; and
- the number of, and reasons for, complaints and appeals against termination decisions, including cases referred to an external party for resolution.

#### 8.10.4 Outcomes

The following are potential D&I outcomes related to cessation of employment:

- policies, processes and practices that end employment are transparent, implemented impartially, minimize biases and prevent discrimination;
- consultation mechanisms with individuals and, where they exist, workforce representatives and unions are valued and respected by all stakeholders;
- individuals are treated with dignity and respect, and with due regard to their health and well-being; their personal data is secured;
- people, including those from demographically under-represented groups, are aware of cessation of employment policies, processes and practices, and are not adversely affected by them; and
- the organization has a reputation as an inclusive employer.

## 9 Products and services — design, development and delivery

### 9.1 General

The purpose of most organizations is to provide products or services to a variety of stakeholders. Generally, a product is a physical item that an organization produces, while a service is a non-physical item that an organization provides. Through effective HR management, people involved in all stages of design, development and delivery of products and services should experience decent work, safe and secure working conditions, and fair and respectful treatment. By leveraging diverse perspectives, products and services can be more inclusive and innovative and meet the needs of a broader base of customers, clients and users. The production, marketing and advertising of an organization's products and services should align with its D&I principles, for example by using inclusive wording and imagery. In response to shifting demographics and evolving demands, as well as advances in science and technology, organizations should adopt a continual improvement approach to product and service design, development and delivery. This approach can increase the diversity of their customers, clients and users, and support expansion into new markets and revenue sources to improve organizational sustainability.

### 9.2 Actions

To achieve D&I objectives related to products and services, organizations should:

- integrate D&I principles into the design, development and delivery of products and services, and promote inclusive and respectful customer service;
- advocate inclusive working practices, safe working conditions, and fair and respectful treatment of the workforce, contingent workers and those in the supply chain;
- investigate current and emerging markets to understand the unique requirements of a variety of customers, clients and users, and identify any unmet demands;
- use perspectives from the broadest range of stakeholders, including the workforce, in the design, development and delivery of products and services;

- use positive images of people from diverse backgrounds and inclusive language in product and service marketing and advertising communication;
- solicit feedback from the broadest range of stakeholders about the quality of their customer service experience, including the behaviour of the organization's representatives;
- solicit feedback from the broadest range of stakeholders about their satisfaction and dissatisfaction with the organization's products and services;
- collect data on market opportunities and risks to evaluate the relevance and impact of products and services on diverse market segments; and
- collect information from people about the work environment and their treatment at work.

### 9.3 Measures

Examples of measures that can be material to the organization, analysed by aggregate and segmented diversity dimension, include:

- trends, either positive or negative, in product and service use;
- the number of reported examples of positive customer service, in particular those citing inclusive behaviour by a member of the workforce;
- the number of reported examples of negative customer service, in particular those citing non-inclusive behaviour by a member of the workforce; and
- trends in feedback about the work environment, including how people are treated at work.

### 9.4 Outcomes

The following are potential D&I outcomes related to products and services:

- products and services meet the needs of a broad range of customers, clients and users, and foster improved organizational sustainability;
- marketing and advertising initiatives are effective in reaching the broadest range of potential customers, clients and users;
- feedback from a broad range of stakeholders fosters innovation and enhancement of products and services;
- people involved in their design, development and delivery, including contingent workers and those in the supply chain, experience decent work, safe and secure working conditions, and fair and respectful treatment;
- communication, teamwork, and productivity are enhanced; and
- the organization has a reputation as a provider of inclusive products and services.

## 10 Procurement and supply chain relationships

### 10.1 General

Organizations use procurement to purchase goods or services. Generally, the procurement process includes tendering, supplier selection, contracting and contract management stages. The organization's D&I principles should be integrated into each stage of the process. Collectively, the suppliers of an organization form its supply chain, which can comprise vendors or subcontractors of different sizes, sectors and locations. Supplier diversity is a business strategy used to broaden the range of suppliers, including businesses owned by demographically under-represented individuals or groups, and improve

organizational resilience. Supply chain partners should demonstrate a continual commitment to D&I and their effective HR management practices to ensure the provision of decent work, safe and secure working conditions, and fair and respectful treatment of people.

## **10.2 Actions**

To achieve D&I objectives for procurement and supply chain relationships, organizations should:

- integrate and communicate their D&I principles, objectives and expectations into each stage of the procurement process;
- engage in supplier outreach activities to identify a variety of potential suppliers, create opportunities for businesses owned by demographically under-represented individuals or groups, expand stakeholder relationships and improve organizational resilience;
- simplify procurement processes, for example accessibility of documentation, use of supplier diversity portals and adoption of pre-qualification systems to provide procurement opportunities to the broadest range of suppliers;
- in the supplier selection stage, assess how the HR management practices of potential supply chain partners align with the organization's D&I principles;
- incorporate D&I contractual clauses that require supply chain partners to provide decent work, safe and secure working conditions, and fair and respectful treatment of people;
- monitor supply chain partner performance against D&I contractual clauses;
- engage with supply chain partners through, for example, supplier forums and feedback mechanisms, to share and exchange D&I experience and expertise, strengthen stakeholder and community relationships, and develop economic opportunities;
- collect data on the activities related to procurement and supply chain relationships, such as the number of, and spend with, organizations owned by demographically under-represented individuals or groups; and
- periodically review the D&I provisions in procurement policies, processes and practices, and performance of their supply chain partners.

## **10.3 Measures**

Examples of measures that can be material to procurement and supply chain relationships, analysed by aggregate and segmented diversity dimension, include:

- the number of organizations, by ownership, progressing through each stage of the procurement process, including those registering an interest in contract opportunities;
- the amount of spend with organizations in the supply chain;
- the number of people working for supply chain partners;
- the number of complaints, incidents and allegations relating to bias or discrimination to determine breaches in D&I contractual clauses; and
- the effectiveness of procurement and supply chain activities at different stages.

## **10.4 Outcomes**

The following are potential D&I outcomes of procurement and supply chain relationships:

- the organization's supplier diversity strategy is effective in broadening its range of suppliers;

- supply chain partners continually demonstrate commitment to D&I principles;
- suppliers' HR management policies, processes and practices are aligned to, and influenced by, the contracting organization's D&I principles;
- supply chain partners are recognized for providing decent work, safe and secure working conditions, and fair and respectful treatment of people; and
- the organization's reputation for promoting D&I in its supply chain is recognized.

## 11 External stakeholder relationships

### 11.1 General

Each organization's external stakeholder network will vary according to its organizational context but can include a variety of individuals or groups that can be affected by the organization's operations and activities. This can include investors and shareholders, communities and community organizations, educational institutions, regulatory bodies, advocacy groups and non-profit associations, in addition to customers, clients and supply chain partners discussed in [Clauses 9](#) and [10](#). It is important for organizations to recognize the needs, expectations and interests of these stakeholders, as they can impact D&I outcomes positively or negatively. A proactive, inclusive and collaborative approach to external stakeholder engagement can be used by an organization to demonstrate leadership and commitment to D&I, promote positive D&I perspectives, influence the adoption of inclusive behaviours and practices among stakeholders, and build the organization's reputation for social responsibility.

### 11.2 Actions

To achieve D&I objectives for relationships with external stakeholders, organizations should:

- recognize the needs, expectations and interests of external stakeholders, as they relate to the organization's D&I principles and objectives;
- assess the importance, relative power and influence of external stakeholders, to identify opportunities and risks that can impact the organization's D&I objectives;
- develop external stakeholder engagement strategies based on prioritization of their relevance, needs, interests and power;
- engage in external stakeholder outreach activities to promote the organization's D&I objectives and identify opportunities to support their D&I initiatives;
- communicate D&I principles and objectives when establishing, supporting, promoting and maintaining external stakeholder relationships;
- collect, document and review D&I-related media reports involving external stakeholders;
- document examples of sharing D&I experiences and expertise between the organization and its external stakeholders;
- monitor the influence and impacts of external stakeholders on the organization's D&I objectives and outcomes;
- review the influence and impacts of external stakeholders on D&I outcomes; and
- evaluate and report progress on achieving D&I objectives, for example in annual reports, website communication and other media channels.

### 11.3 Measures

Examples of measures that can be material to relationships with the organization's external stakeholders include:

- changes in external stakeholder needs, expectations, interests, power and influence over time;
- the effectiveness of outreach activities with external stakeholders, based on positive and negative feedback;
- the number of D&I initiatives undertaken with external stakeholders and the effectiveness of their outcomes; and
- external stakeholder perceptions about the organization's commitment to D&I and social responsibility, as reported in news stories and social media.

### 11.4 Outcomes

The following are potential D&I outcomes of external stakeholder relationships:

- the organization engages with the broadest range of relevant external stakeholders;
- the organization's D&I principles and objectives are publicly supported by external stakeholders;
- D&I knowledge and good practice is shared between the organization and its external stakeholders; and
- the organization is recognized for its commitment to D&I and social responsibility.

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## Annex A (informative)

### Self-assessment checklist

[Table A.1](#) provides a collated list of all D&I actions included in [Clauses 5](#) to [11](#). Organizations can use this self-assessment checklist to internally assess their current status compared with this document's recommended D&I actions. Organizations using this document should also refer to the example measures and potential outcomes in each clause to identify the means by which they can evidence achievement of these actions, based on their context and size. Each organization is different in how they demonstrate meeting or not meeting the document's recommended actions, supported with evidence. [Table A.1](#) can assist in identifying D&I opportunities and risks, how they can be optimized and mitigated, and the development of gap closure strategies.

**Table A.1 — Self-assessment checklist**

| <b>Clause 5 Accountabilities and responsibilities</b> |  |                            |
|---|--|----------------------------|
| <b>5.2 Organizational governance</b>                  |  |                            |
| <b>D&amp;I actions</b>                                |  | <b>Supporting evidence</b> |
| 1   | Directing senior leaders to establish D&I principles and objectives, and allocation of resources to achieve them.  |                            |
| 2   | Demonstrating commitment to D&I and role modelling behaviours that are consistent with D&I principles, shared values and beliefs.  |                            |
| 3   | Challenging and addressing behaviour that is inconsistent with D&I principles and ensuring that people who challenge inappropriate behaviour, and those who are affected by it, are protected and supported. |                            |
| 4   | Holding senior leaders to account when evaluating the organization's D&I opportunities and risks, and reviewing performance and progress in achieving D&I objectives and the impact of their outcomes.       |                            |

| <b>Clause 5 Accountabilities and responsibilities</b> |   |                            |
|---|---|----------------------------|
| <b>5.3 Organizational leadership</b>                  |   |                            |
| <b>D&amp;I actions</b>                                |   | <b>Supporting evidence</b> |
| 1   | Establishing D&I principles and objectives and a supporting framework to realize these.   |                            |
| 2   | Facilitating an inclusive organizational culture by establishing D&I expectations and accountabilities, communicating these to all stakeholders, and fostering inclusive relationships and shared values with them.                                 |                            |
| 3   | Demonstrating their commitment by role modelling inclusive behaviour, setting behavioural expectations for the workforce, challenging and addressing inappropriate behaviour, and recognizing and rewarding D&I inclusive practices and behaviours. |                            |
| 4   | Designating responsibility for achieving D&I objectives to those who lead functional areas in the organization.   |                            |

| <b>Clause 5 Accountabilities and responsibilities</b> |   |                            |
|---|---|----------------------------|
| <b>5.3 Organizational leadership</b>                  |   |                            |
| <b>D&amp;I actions</b>                                |   | <b>Supporting evidence</b> |
| 5   | Ensuring that the organization's systems, policies, processes and practices across all functional areas align with its D&I principles and objectives.   |                            |
| 6   | Allocating resources to achieve D&I objectives, for example sponsoring initiatives, ERGs and steering committees, including allocation of time and support for participating and contributing to the achievement of D&I objectives.   |                            |
| 7   | Reviewing the outcome and impact of their products and services on market segments and the broadest range of stakeholders.  |                            |
| 8   | Ensuring that the organization's annual report includes a clear narrative description of its D&I opportunities and risks, and progress on achieving D&I objectives, supported by robust evidence and demographic data of its workforce (see ISO 30414 for guidance on human capital reporting). |                            |

| <b>Clause 5 Accountabilities and responsibilities</b>            |   |                            |
|--|---|----------------------------|
| <b>5.4 Organizational delegated responsibilities for D&amp;I</b> |   |                            |
| <b>D&amp;I actions</b>   |   | <b>Supporting evidence</b> |
| 1  | Ensuring that D&I principles are embedded in functional systems, policies, processes and practices.   |                            |
| 2  | Sharing D&I knowledge, skills and expertise, and providing advocacy and guidance on policies, processes and practices that promote a diverse and inclusive organizational culture.  |                            |
| 3  | Demonstrating and role modelling inclusive behaviours.  |                            |
| 4  | Deploying resources to respond to opportunities, risks, constraints and challenges in order to achieve D&I objectives.  |                            |
| 5  | Fostering an inclusive and diverse workplace by enabling access and adjustments to increase participation of demographically under-represented groups.  |                            |
| 6  | Ensuring policies, processes, practices and decisions about people, as they move into, through and out of the organization, are evidence-based and supported by checks and balances to mitigate the effects of bias, including any in existing and emerging technologies. |                            |
| 7  | Promoting the organization's D&I principles and objectives through all stages of the human resource management life cycle.  |                            |
| 8  | Facilitating open channels of communication so that diverse perspectives are received with respect and without prejudice.   |                            |
| 9  | Enabling a safe environment for D&I issues, concerns and complaints to be raised, and ensuring policies, processes and practices are fairly applied for all stakeholders, including whistle-blowers.  |                            |
| 10   | Ensuring that stakeholder feedback is considered when monitoring the implementation of policies, processes and practices to identify D&I impacts, outcomes, challenges, constraints and trends.   |                            |

| <b>Clause 5 Accountabilities and responsibilities</b>            |   |                            |
|--|---|----------------------------|
| <b>5.4 Organizational delegated responsibilities for D&amp;I</b> |   |                            |
| <b>D&amp;I actions</b>   |   | <b>Supporting evidence</b> |
| 11   | Promoting the organization's D&I principles and objectives through contracting arrangements with the supply chain, relationships with customers and communities, and other external stakeholders.                         |                            |
| 12   | Identifying and analysing diversity data to measure impacts.  |                            |
| 13   | Identifying the criteria and associated measures for D&I that are material to the organization.   |                            |
| 14   | Evaluating the impact of policies, processes and practices on the development of an inclusive workplace (including the movement of people into, through and out of the organization) and other stakeholders.              |                            |
| 15   | Reviewing and reporting the status and progress against identified D&I objectives (including the assessment of risk and opportunities), any recommendations for change and inclusion in the organization's annual report. |                            |

| <b>Clause 5 Accountabilities and responsibilities</b> |   |                            |
|---|---|----------------------------|
| <b>5.5 Individual responsibilities</b>                |   |                            |
| <b>D&amp;I actions</b>                                |   | <b>Supporting evidence</b> |
| 1   | Treating colleagues, customers, suppliers and other stakeholders with respect and fairness. |                            |
| 2   | Meeting expectations of the organization's D&I principles and objectives.                   |                            |
| 3   | Behaving inclusively, actively fostering inclusion, trust and a sense of belonging.         |                            |
| 4   | Voicing concerns and challenging inappropriate behaviour.                                   |                            |

| <b>Clause 6 D&amp;I framework</b> |  |                            |
|-----------------------------------|--|----------------------------|
| <b>D&amp;I actions</b>            |  | <b>Supporting evidence</b> |
| 1                                 | Designate responsibility for ensuring that the framework is relevant, developed and maintained.  |                            |
| 2                                 | Establish the rationale for D&I.   |                            |
| 3                                 | Ensure organizational leaders articulate their commitment to sponsoring, developing and sustaining an inclusive organization.                                |                            |
| 4                                 | Integrate D&I principles and objectives into organizational policies, processes and practices.   |                            |
| 5                                 | Identify D&I measures, which are material to the organization and utilize aggregated and segmented workforce and other stakeholder data, to assess progress. |                            |
| 6                                 | Inform members of the workforce about the D&I objectives, and opportunities to contribute to them.   |                            |
| 7                                 | Align departmental, group, team and individual objectives to D&I objectives.   |                            |
| 8                                 | Identify, monitor and address D&I risks, challenges and constraints, and optimize D&I opportunities.   |                            |

| <b>Clause 6 D&amp;I framework</b> |  |                            |
|-----------------------------------|--|----------------------------|
| <b>D&amp;I actions</b>            |  | <b>Supporting evidence</b> |
| 9                                 | Review plans, systems, technologies, policies, processes and practices to ensure that they are fair, equitable and do not adversely impact people, including those related to the use of technologies and automated systems. |                            |
| 10                                | Collect data on workforce and other stakeholder perceptions about the organization's commitment to D&I, such as from focus groups, surveys, interviews and external reviews.   |                            |
| 11                                | Review D&I outcomes and impacts related to the procurement and delivery of goods and services and interactions with external stakeholders.   |                            |
| 12                                | Regularly review D&I objectives to ensure alignment with the organization's vision, mission and strategy as well as its organizational context.  |                            |
| 13                                | Periodically report on progress in achieving the organization's D&I objectives, such as in an annual report. For guidance on human capital reporting, see ISO 30414.   |                            |

| <b>Clause 7 Inclusive culture</b> |  |                            |
|-----------------------------------|--|----------------------------|
| <b>D&amp;I actions</b>            |  | <b>Supporting evidence</b> |
| 1                                 | Prioritize and promote D&I principles and objectives through communications, engagement and outreach activities, HR lifecycle policies, processes and practices, and relationships with all stakeholders.  |                            |
| 2                                 | Ensure ethical and regulatory considerations are applied to collecting, interpreting and using data.   |                            |
| 3                                 | Encourage people to disclose their demographic data by explaining the data will be used to improve systems, policies, processes and practices, identify and address disparities, and that ethical and regulatory considerations are applied to its collection, interpretation and use. |                            |
| 4                                 | Provide mechanisms for people to voice their opinions and make suggestions for change about D&I in the organization, for example in focus groups, surveys, suggestions schemes and other stakeholder feedback methods that foster dialogue and debate.                                 |                            |
| 5                                 | Communicate behavioural expectations that promote the importance of inclusive, respectful behaviour.   |                            |
| 6                                 | Provide mechanisms to identify, examine and resolve workplace conflict and ensure these are used appropriately to address individual concerns, for example interpersonal interactions and outcomes, bullying, harassment and microaggression, and any form of retaliation.             |                            |
| 7                                 | Seek feedback on the culture at work from individuals, ERGs, focus groups, committees and task groups, workforce representatives, work councils and labour union representatives, where they exist.  |                            |
| 8                                 | Collect data by diversity dimension on workforce health, safety and well-being, including absence, workforce turnover and retention to identify trends and adverse impacts.  |                            |

| <b>Clause 7 Inclusive culture</b> |   |                            |
|-----------------------------------|---|----------------------------|
| <b>D&amp;I actions</b>            |   | <b>Supporting evidence</b> |
| 9                                 | Collect data by diversity dimension relating to workplace conflict, such as incidents, disputes, discipline and grievances, complaints of bullying, harassment and microaggression, forms of retaliation as well as resolution outcomes to identify trends and adverse impacts. |                            |
| 10                                | Use internal and external, solicited and unsolicited feedback to gain insight into the organization's reputation as an inclusive organization.  |                            |
| 11                                | Report on the development of an inclusive organizational culture, workforce composition, D&I opportunities and risks, and action plans.   |                            |

| <b>Clause 8 Human resource management life cycle</b> |   |                            |
|--|---|----------------------------|
| <b>8.2. Workforce planning</b>                       |   |                            |
| <b>D&amp;I Actions</b>                               |   | <b>Supporting evidence</b> |
| 1  | Develop a workforce plan that incorporates D&I principles and objectives.   |                            |
| 2  | Identify D&I implications of organizational workforce planning strategies, including D&I opportunities and risks.   |                            |
| 3  | Ensure the organization's workforce plan identifies job families and roles, knowledge, skills and abilities, required now and in the future, together with identified workforce diversity dimensions.                             |                            |
| 4  | Collect workforce composition data for comparison with demographic profiles in industries, sectors, regions and national populations.   |                            |
| 5  | Compare the workforce demographic profile with external workforce supply and demand data to identify demographic under-representation, D&I opportunities and risks.   |                            |
| 6  | Identify inclusion opportunities in the workforce plan, for example, progression of people from demographically under-represented groups, flexibility and accessibility considerations, and the distribution of skills and roles. |                            |
| 7  | Review the outcomes and impacts of workforce planning strategies and activities on becoming a more inclusive organization.  |                            |

| <b>Clause 8 Human resource management life cycle</b> |  |                            |
|--|--|----------------------------|
| <b>8.3. Remuneration</b>                             |  |                            |
| <b>D&amp;I actions</b>                               |  | <b>Supporting evidence</b> |
| 1  | Incorporate D&I principles and objectives in policies, processes and practices that recognize the value of inclusive workforce participation, and collective bargaining where it exists. |                            |
| 2  | Evaluate and benchmark the relative worth and market value of job roles to ensure an equal pay for equal value approach.   |                            |
| 3  | Make pay and benefits decisions in a fair, inclusive, equitable and transparent manner.  |                            |