

Diversity Equity and Inclusion in ASHRAE



February 11, 2021

ASHRAE Proactive Diversity Task Group



Charge of the Task Group

The Black Lives Matter movement and other recent events drawing attention to social inequalities in the United States and around the world has led ASHRAE leaders to consider how ASHRAE is proactively supporting its Diversity Commitment.

The Board voted on developing a Diversity and Inclusion Policy at the Winter 2018 Board Meeting. At the Orlando 2020 ASHRAE Winter Conference, the Board of Directors approved a Diversity Commitment for the Society (see sidebar).

ASHRAE's Diversity Commitment

ASHRAE is committed to providing a welcoming environment. Our culture is one of inclusiveness, acknowledging the inherent value and dignity of everyone. We proactively pursue and celebrate diverse and inclusive communities understanding that doing so fuels better, more creative, and more thoughtful ideas, solutions and strategies for the Society and the communities our Society serves. We respect and welcome all people regardless of age, gender, ethnicity, physical appearance, thought styles, religion, nationality, socio-economic status, belief systems, sexual orientation or education.

ASHRAE's Discrimination and Harassment Policy

ASHRAE has a Discrimination and Harassment Policy that strictly prohibits and does not tolerate discrimination against staff, members, or applicants for membership because of such individual's race, color, religion, age, sex, sexual orientation, national origin, physical or mental disability, pregnancy, genetic information, veteran status, uniformed service member status, or any other category protected under applicable law.

ASHRAE has also provided special attention at the prohibition of sexual harassment within the policy. This year's PAOE program encourages Chapter Board of Governors for undertaking sexual harassment prevention training by viewing a series of online videos

recommended by ASHRAE. This initiative will be extended to other ASHRAE volunteers soon.

ASHRAE Presidential Member Darryl Boyce, P.Eng., Fellow ASHRAE, and President Chuck Gullledge, P.E., Member ASHRAE, formed the Proactive Diversity Task Group in June 2020 to develop detailed programs and initiatives that will seek to eliminate all forms of discrimination and social injustice, and proactively drive diversity, through all levels within ASHRAE. The formation of the Task Group is in response to the Board of Directors motion passed January 24, 2018 to develop a Diversity and Inclusion Policy for Society. The Task Group's efforts will build on ASHRAE's current commitments to diversity and inclusion by exploring when and why the ASHRAE culture may be marginalizing underrepresented groups and reexamining our policies, programs and procedures against current law and best practices.

The Task Group's efforts build on ASHRAE's current commitments to diversity and inclusion. The Group is composed of the following Full Members: Tim McGinn (Chair), Robin Bryant, Sheila Hayter, Russell Lavitt, Dunstan Macauley, Andres Sepulveda and Staff Member Tanisha Myers-Lisle. The Task Group includes members from groups underrepresented in the Society as well as members involved in previous diversity and inclusion work undertaken at the senior leadership level.

The Task Group has also considered recent work on this issue by reviewing the **Member's Council Diversity Initiative Report** dated June 2017. This report's recommendations address all the recommendations from the Member's Council Diversity Initiative Report Recommendations.

The **Member's Council Diversity Initiative Report Summary Recommendations** are:

1. The Society shall include Diversity as one of the pillars of the Society's core values.
2. The Society shall update the Rules of the Board to include a detailed Diversity and Inclusion (D&I) Policy.
3. The Society shall implement an Action Plan to promote diversity at all levels of the society, including Chapter and Regional Officers, Society Committees, Technical Committees, Councils, and Board of Directors.

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4. The Society shall develop and maintain a database on race, gender, etc. to allow the Society to generate the necessary metrics on diversity and inclusion in ASHRAE.

Task Group Goals

The Task Group established five goals for the initiative (following a facilitated work session with the Board of Directors in August 2020):

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| Goal 1 | Communicate a compelling rationale for diversity, equity and inclusion (DEI) in engineering, the HVAC&R industry and ASHRAE. |
| Goal 2 | Develop an understanding of the diversity profile of those in engineering, the HVAC&R industry and ASHRAE relating to education, training, employment, and membership. |
| Goal 3 | Understand and remove barriers to equity and inclusion through programs, education, and advocacy. |
| Goal 4 | Identify metrics to measure and report on impact. |
| Goal 5 | That ASHRAE leads the way in demonstrating good diversity, equity and inclusion in practice. |

What do we mean by Diversity, Equity, and Inclusion - **DEI**?

Diversity within the context of this report, we will be referring to diversity of identities, such as race and gender and, in some cases ethnicity, religion, nationality, physical or mental disability, and sexual orientation. Some may think of these identities as protected classes — identities that have received (and still receive) systemic discriminatory treatment and create disadvantages and barriers to opportunity and resources.

Equity is an approach or process to ensure everyone has access to the same opportunities. It recognizes that disadvantages and barriers exist and that all members

do not start at the same place. Equity is the process that acknowledges that unequal starting place and introduces corrections to address the imbalance.

Inclusion is about a group (our membership) with different identities perceiving being valued, leveraged, and welcomed within a given setting (our Society or Industry). ASHRAE can have a diverse membership but it does not mean that members with marginalized identities such as women or people of color feel welcome or valued as they may not be given equal opportunities to participate and grow.

What Does the Membership Say?

The Task Group engaged the general membership in the discussion about DEI in two ways. An article was published in the November 2020 Insights on November 18, 2020 ([Read more](#)). At the end of the article were two links. The first link was to an anonymous nine-question survey on DEI, the second link was to an online form where members could anonymously submit comments and suggestions and share their aspirations on how ASHRAE and the industry can advance toward a more equitable model where people are treated fairly.

A more general and brief email was sent to membership on December 4, 2020 again providing the two links described above. The members generated 885 survey responses and the separate online form generated an additional 23 responses.

The survey included two opportunities to provide comments, the first in response to a few questions, and the second as an opportunity for final open thoughts.

It is important to understand how the membership currently views DEI and how ASHRAE supports DEI.

- Fifty-six percent of respondents feels ASHRAE's demographics fairly represent the industry, about half feel women and people of color are underrepresented in the industry.
- Respondents are split equally on whether Chapter and Regions need to improve DEI efforts with 20% not knowing one way or the other.

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- Half of respondents did not know if ASHRAE publicly communicates its goals on diversity, and of those who did have an opinion, most felt that ASHRAE does communicate adequately.
 - Half of the respondents felt ASHRAE should be doing more to promote diversity, equity and inclusion in the HVAC&R Industry, 37% indicated ASHRAE should not be doing more and 12% did not know.

When asked “What, if anything, could ASHRAE be doing more of to promote diversity, equity, and inclusion in the Society? Please share your thoughts.”, 484 or 54% of respondents provided comments and of those 73% of the comments were supportive of ASHRAE taking further action with respect to DEI.

When asked at the end of the survey to provide additional comments, 327 or 37% of respondents provided comments and of those 63% of the comments were supportive of ASHRAE, taking further action with respect to DEI.

The separate online comment form generated 23 responses, 16 were negative.

Many of the positive online and survey comments provided detailed suggestions of issues and opportunities experienced, recommended new programs, or initiatives or provided encouragement to continue development of DEI within ASHRAE and the Industry.

The negative responses both online and with the survey were generally shorter and blunt and can mostly be characterized as: a) why fix a problem that does not exist within ASHRAE or b) stick to our mission as a technical society

The member survey feedback reveals that about half of the membership who responded by answering the questions feel that DEI efforts should be further developed within ASHRAE. Of those that chose to comment within the survey, about two-thirds was positive feedback. The negative comments reveal valuable information that the Task Group has considered as part of this report and their recommendations, such as ...

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1. ASHRAE must be focused in advancing DEI
 2. Education of what DEI is and how it can or does affect ASHRAE is critical in having as many well informed and supportive members as possible.
 3. Our DEI efforts must support our core Mission and Values.

Task Group Research

The Task Group conducted focused research to help determine an approach of advancing DEI as is appropriate for ASHRAE. There are many organizations that are well advanced in their development of DEI programs and policies. Many of these organizations were identified and researched by members of the Task Group. Each organization's programs and policies were reviewed and summaries highlighting the most compelling takeaways were prepared for discussion with the rest of the Task Group members. Successful programs effectively highlight the rationale for having DEI programs to their membership or employees. In some cases, contacts within the organizations were interviewed for further understanding. Some of the organization the Task Group researched include:

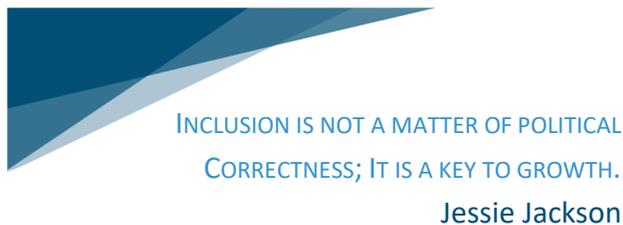
- Accenture
- AIA
- ASME
- CIBSE
- IEEE
- Trane
- USGBC
- National Society of Professional Engineers
- National Council of Non-Profits
- NIBS – National Institute of Building Sciences
- Royal Academy of Engineers
- SWE – Society of Women Engineers
- Infectious Diseases Society of America
- YMCA

Research revealed best practices as well as common features and characteristics of successful DEI Initiatives. The Task Group discussed ways that other organizations effectively tailored DEI programs to best suit their needs and selectively adapted those approaches to develop the recommendations contained within this report.

Goal 1 Rationale for DEI in Engineering, the HVAC&R industry and ASHRAE.

While the moral and humanitarian justification for diversity equity and inclusion are well understood, building a compelling rationale for DEI in engineering starts with the basic premise that there is a predicted worldwide shortage of engineers. This premise can easily be substantiated with a Google search of “engineer shortages” which yields nearly 5,000 hits. Industry needs will not be met without innovative approaches to the attraction, education, and employment of new talent to fill the predicted skills gap.

The demand for talent is also not isolated to engineering, similar shortages and forecast demands exist for engineering technologists and HVAC&R trades and technicians. Filling the skilled labor shortage necessitates a concerted approach to more balanced recruitment from the entire potential talent pool available in society. The effort requires a wider uptake from all demographics for STEM (Science, Technology, Engineering and Mathematics) education, engineering career choices and HVAC&R Trades.



Most of ASHRAE’s sphere of influence, the engineering profession, is still overwhelmingly dominated by white men. For instance, the National Science Foundation - National Centre for Science

and Engineering Statistics (NSF 19-304, 9-13) indicates that of recent engineering bachelor’s degree recipients in 2017, almost 78% of the engineering workforce who graduated from US educational institutions were male, 64% were white, 14% Asian, and 19% were underrepresented minorities.

The rationale for inclusion within the HVAC&R industry must be equally compelling as the need for cultivating wider diversity. Retaining a diverse makeup of members can only be successful by welcoming their inclusion as active participants and by fulfilling their endeavors with personal and professional development, advancement, and fellowship.

In the past, ASHRAE was able to excel with an almost exclusively white, male membership base. This base is aging and does not reflect the changing demographics of society. A more diverse base can support ASHRAE’s goal of developing greater influence and growth through international expansion of membership, chapters, and student branches.

As stated in the Members Council report – “studies have shown that individuals from a wide array of backgrounds generally provide unique perspectives that shape, blend and influence how to advance an organization’s mission.” DEI is essential to thriving in the 21st century. Benefits include increased membership which results in increased revenue; diverse groups are more innovative and can make better decisions that align with the Society’s mission and/or find creative ways to solve problems; increases engagement and participation; and access to a vast array of knowledge. On the Staff side it improves job satisfaction and generates higher levels of trust.

Goal 2 Understanding the Diversity Profile of the HVAC&R Industry and ASHRAE

Our current Society demographics information associated with tracking diversity is limited by law, so ASHRAE really cannot fully track how diverse our membership is or is not. Currently, society tracks little relevant information on members and is limited through the application process to:

1. Age
2. Voluntary Gender (Male or Female)
3. Education/Degree
4. Country of Residence

There is some voluntarily supplied detailed member demographics currently available under the member’s biographical information (My Profile) apart from a voluntary identification under Contact Info of male vs. female members, preference of Prefix (Mr., Mrs., Miss, Ms., Dr. or Prof.) and ethnicity (Caucasian, African American, Native American, Hispanic, or Other). As of November 2020, with total members of 54,215,

97% of the membership has self-identified which has yielded a summary of women in ASHRAE.

Women in ASHRAE Demographics

This limited demographic data reveals some basic information regarding female members in ASHRAE. It shows that as the member grade represents older members, the percentage of females in the membership grade decreases, revealing it is the younger women members that are growing the ranks of women in ASHRAE. This is a positive trend. Students represent the youngest membership and show a significantly higher percentage of women. The female student membership still lags the 22% of American undergraduate engineering students that are women, but it does not seem to lag the percentage of women in mechanical engineering. In 2015, 13.2% of mechanical engineering graduates in the US were female.

ASHRAE Membership – November 2020		
Member Grade	Female Members	% of Society Totals
Affiliate	221	13.3%
Associate	1,566	8.6%
Fellow Life Member	3	1.0%
Fellow Member	9	5.3%
Life Member	34	0.5%
Life S-B-A Member	1	4.2%
Member	1,041	5.0%
Presidential Member	1	4.8%
Retired Member	7	2.4%
S-B-A Associate	6	3.8%
S-B-A Member	13	7.4%
Student	1,063	17.1%
Total	3,965	7.3%

S-B-A – Student Branch Advisor

Advancement of female student members in ASHRAE lags male students significantly (8.6% for the Associate Grade); this could reflect the difficulty the HVAC&R Industry has had in attracting the female workforce. Unique membership promotion retention strategies of female student members is necessary to improve the female membership.



MINORITY'S (SIC) DO NOT WANT CONDESCENSION; HOWEVER, SOME MEASURE OF "AFFIRMATIVE ACTION" IS NECESSARY. FOR THE INDUSTRY AS A WHOLE, ADDITIONAL RESOURCES NEED TO BE PROVIDED TO TRAIN COMPETENT TECHNICIANS. ASHRAE COULD PARTNER WITH TRADE SCHOOLS OR OFFER STANDALONE TRAINING FOR HIGH SCHOOLS IN UNDERPRIVILEGED COMMUNITIES. THERE IS GOING TO BE A SHORTAGE OF TECHS IN THE NOT TOO DISTANT FUTURE AS MANY ARE RETIRING. NEW TECHNOLOGY AND REFRIGERANT CHANGES WILL CAUSE MANY CURRENT TECHS TO JUST MOVE OUT OF THE INDUSTRY.

ASHRAE Member

Expanding Collection of Demographics

Demographic information regarding the makeup of the HVAC&R Industry in general is also lacking. Data exists to indicate projected market, job, and revenue growth. The information however stops short of characterizing the diversity or lack of diversity in the workforce.

Organizations such as The American Institute of America (AIA), conduct a

detailed voluntary membership survey every few years to collect as much data on diversity of their membership. The results of the survey are used to shape the programs offered to the membership and the strategies for attracting, supporting, and retaining members. The data is also used to track progress of their DEI initiatives and efforts.



I THINK THIS QUESTION MAY BE POPULAR AND CONFORMIST VIEW, IN MY VIEW PROGRAMS WILL NOT CHANGE UNDERLYING CAUSE(S) OF THE PROBLEM. UNLESS AND UNTIL WE CHANGE TO FOCUS PRIMARILY ON THE TRADES PEOPLE AND FIELD WORKERS AND AWAY FROM THE ADVANCED DEGREEED PROFESSORS AND SCIENTISTS, LACK OF DIVERSITY WILL PERSISTS. I DARE SAY, THE CURRENT DIVERSITY IS PERHAPS A GOOD REFLECTION OF THAT IN OUR TARGET AUDIENCE.

ASHRAE Member

ASHRAE would find it useful to know more about who our members are. Collecting and tracking of member demographics such as socio-economic and ethnic backgrounds, visible minorities, identification with LGBTQ+, HVAC&R employment, abilities, disabilities, or health care needs is, however, a tricky matter. Collecting demographic information would allow ASHRAE to assess the current membership for DEI characteristics and set



IN ALL OF THE ASHRAE CONFERENCES, SEMINARS AND COMMITTEE MEETINGS I'VE ATTENDED, I HAVE BEEN IMPRESSED WITH THE NUMBER OF CULTURES REPRESENTED FROM AROUND THE WORLD. I DON'T KNOW IF ASHRAE'S MARKETING IS SUFFICIENT IN UNIVERSITIES, BUT I FIRST LEARNED ABOUT ASHRAE FROM A COLLEGE PROFESSOR MANY YEARS AGO. IF IT HADN'T BEEN FOR HER, I WOULD NOT HAVE HEARD OF ASHRAE. DO SMALL HVAC&R BUSINESSES FEEL THEY GET ENOUGH BENEFIT FROM ASHRAE FOR THE COST? PROBABLY NOT. THAT WOULD BE THE ONLY AREA I CAN SEE FOR A WIDER SPECTRUM OF MEMBERSHIP.

ASHRAE Member

goals for improving Society diversity and inclusion but we must also respect privacy laws and our members. Tracking demographics would allow ASHRAE to assess the success and effectiveness of DEI initiatives.

Demographic data must be lawful and collected respecting member's privacy and must be voluntary given on their part. This is most easily undertaken through a periodic voluntary survey of members.

Goal 3 Understand and remove barriers to equity and inclusion through programs, education, and advocacy.

Building a stronger culture of equity, diversity, and inclusion in ASHRAE will help the Society to be more creative, innovative, and resilient, drive group performance and improve member and staff retention. The aim is to remove barriers experienced by underrepresented groups and strongly articulate the need for their participation in ASHRAE. The Society's call to action will start with ASHRAE's membership and staff, extend through the HVAC&R industry and engineering profession and finally to promoting STEM education programs to children, schools, and educators.

We need to support an inclusive culture that will inspire, attract, train, and retain more women, the physically and mentally challenged, LGBTQ+ and younger people from all socio-economic and ethnic backgrounds to engineering, HVAC&R employment and our ASHRAE membership. It is about equity within our industry, ensuring all who are interested (or potentially interested) in the buildings industry feel welcome and valued. Of particular importance is using our student branches to attract and retain interested and committed members through our support and retention efforts.

Creating diversity is one focus, but of equal importance is nurturing a culture of inclusion in which all members are respected and appreciated as valuable members of

ASHRAE. Achieving this will challenge everyone at all levels of ASHRAE to consider how their behavior supports this vision, and if necessary, change to become more inclusive collaborators, members, and staff. If ASHRAE’s culture is not inclusive, members will leave and discourage others from participating.

Goal 4 Identify metrics to measure and report on impact.

Collecting and tracking of current member demographics would allow the Society to set goals for improving DEI. The information would also allow ASHRAE to assess the success and effectiveness of DEI initiatives. The establishment of demographic information and the use of the data to further DEI initiatives is proposed to be one of the main responsibilities of the DEI Advisory Committee (refer to Recommended Actions, Item 1).

Recommended Actions

1. **Form a Board of Directors DEI Advisory Subcommittee** to maintain an ongoing conversation with all the different members of the Society and HVAC&R Industry – **Refer to Appendix A** for details.
2. **Develop Chapter and Society programs** on DEI through the DEI Advisory Subcommittee (webcasts, Town Halls, Insight or Journal Articles, forums, conferences, and webinars) including collaboration with other Societies.
3. **Expand ASHRAE’s Discrimination and Harassment Policy** to encompass Diversity, Equity and Inclusion. Items that are recommended to be reviewed include:
 - a. Identify more clearly the scope of the document; it applies to such as all Member grades, candidates for membership, award/grant applicants, award/grant recipients, job applicants, employees, volunteers, visitors, event participants, temporary employees, and delivery partners.
 - b. Identify the ASHRAE bodies responsible for administering, reviewing, and revising the policy.

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- c. Publish ASHRAE’s internal employee policies and procedures as part of the policy
 - d. Communication of the policy; how the policy will be communicated to the public, members, volunteers, and employees. Advocacy, education, and training efforts for both members and staff should be outlined.
 - e. Communication with outside partners by asking to see their policies and asking what they do in practice, including the monitoring of their policy
 - f. Widen the complaint procedure to identify at least two contacts to report discrimination or harassment complaints
4. **Establish a DEI Program for employees** by:
 - a. Engaging an external DEI HR Consultant to evaluate current practices and recommend best practices for DEI modernization to make certain ASHRAE attracts, develops and retains a high-performance workforce from a diverse pool of the best talent. Measure recommendations against best DEI practices such as recommended by the Forty Factors – **Refer to Appendix B.**
 - b. Reinstitute a thorough Staff Professional Development, Training and Education program with sufficient and consistent annual funding.
 - c. Identify a staff DEI group under the guidance of HR Staff and develop under their leadership a staff network or committee which host webinars, training, games, staff surveys, etc..
 5. **Institute DEI Member Survey** every 3 years to benchmark progress on DEI initiatives, membership (and industry) demographics and report to membership. Development of the survey to include external consultant to assist.
 6. **Rename and rebrand YEA** (Young Engineers in ASHRAE) and develop a mandate to advance diversity in the young membership and to extend equity to non-engineers. Deemphasizing the “engineer” in this committee to “member” would extend a more focused welcome to non-engineer members.
 7. **Increase the female membership** by developing distinct membership promotion and retention strategies for female student members.
 8. **Require demonstration of DEI initiatives** established with organizations launching or renewing MOU’s with ASHRAE.

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9. **Establish requirements for bidders** on research to demonstrate DEI initiatives as part of qualification for bidding and/or award criteria
 10. **Enact a purchasing policy** to target a percentage increase of services contracted or purchased from majority owned Black or Ethnic Minority businesses. Determine a baseline by conducting an internal audit of the ownership of vendors that are normally engaged by ASHRAE.
 - a. Catering
 - b. Professional Services
 - c. Office Supplies
 - d. Security, landscape and maintenance services
 - e. Meeting arrangements such as temporary workforce, catering, venues etc.
 11. **Incentivize DEI Chapter and Regional Programs through extra points in PAOE** program for:
 - a. STEM activities undertaken in poor and racially diverse K-12 schools
 - b. Showcasing LGBTQ+, Black and Minority Ethnic role models to inspire STEM school visits and student activity initiatives for students in engineering study
 - c. Establishment of Student Branch supported programs for underrepresented groups.
 - d. Development of student branches in American Historically Black Colleges and Universities and similar institutions
 - e. Successful drives for membership prospects from underrepresented socio-economic and ethnic backgrounds or conversion of student members to associate members from underrepresented socio-economic and ethnic backgrounds
 - f. Bursaries and scholarships developed and/or awarded to students attending American Historically Black Colleges and Universities and similar institutions
 - g. Bursaries, grants-in-aids and scholarships awarded to students of disadvantaged socio-economic and ethnic backgrounds
 - h. Host Chapter events such as Town Halls or panel discussions on DEI
 - i. Sponsor activities in supporting various women in engineering organizations and activities such as National Women in Engineering Day.

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- j. DEI Articles and/or discussions published in the Chapter Newsletter or on the Chapter Website

12. Develop partnerships with others to further ASHRAE’s reach and effectiveness in promoting DEI;

- a. Work with industry organizations such as AIA and CIBSE in a plan to source, collect and share global industry demographics
- b. Develop and partner with likeminded organizations that Regions and Chapters can collaborate when implementing the programs and opportunities identified in the PAOE items mentioned above

13. Form an Industry DEI Leadership Group composed of progressive leader within the industry to:

- a. Provide a work placement program and focus these for a more diverse student cohort
- b. Financially support or sponsor initiatives in bursaries, grants-in-aids and scholarships targeted to students of disadvantaged socio-economic and ethnic backgrounds
- c. Encourage companies to supply diverse industry speakers for ASHRAE school visit programs – young, successful female and Black and Minority Ethnic role models



THERE IS A LACK OF MINORITY PARTICIPATION IN ENGINEERING PROGRAMS. I THINK IT STARTS AT HIGH SCHOOL AND JUNIOR HIGH. IF STUDENTS ARE NOT INTERESTED IN MATH AND SCIENCE THEY WILL NOT GO INTO ENGINEERING. IF THEIR SCHOOL DOES NOT HAVE GOOD SCIENCE AND MATH PROGRAMS AND THEY CHOOSE ENGINEERING THEY WILL HAVE A HARD TIME AND FLUNK OUT. I AM ALSO A UNION CONTRACTOR AND WE HAVE PROBLEMS GETTING MINORITY APPRENTICES. THE SCHOOL SYSTEM IS NOT GIVING THEM THE NECESSARY EDUCATION.
ASHRAE Member

- d. Collaborate with ASHRAE on gathering and reporting industry demographics
- e. Promote DEI in the HVAC&R Industry, increasing the pace with which companies acknowledge and rise to the cultural challenge that must be overcome to create a more inclusive environment
- f. Promote a program such as The 10 Steps (a ten-point action plan increase the number of women in STEM) . The aim is to

capture the focus of executives in the HVAC&R Industry and, as part of a public commitment, encourage them to act in increasing their adoption and use of DEI best practices.

The 10 Steps are:

- 1. Understand the starting point and describe a measurable endpoint.*
- 2. Explain the business benefits to managers and give them accountability for change.*
- 3. Change mindsets by challenging bias and sexism whenever and wherever it occurs.*
- 4. Be creative in designing jobs*
- 5. Make flexible working a reality for all employees.*
- 6. Increase the transparency of opportunities for progression.*
- 7. Sponsor female talent, paying attention to career development and giving women the same exposure as men.*
- 8. Demonstrate commitment to retaining and developing talent during and after a career break.*
- 9. Take a structured approach as you would for any other business improvement project.*
- 10. Do not go it alone: work with your employees, supply chain and partners to make a bigger difference.*

Source: <https://www.wisecampaign.org.uk/what-we-do/expertise/industry-led-ten-steps/what-is-the-ten-steps/>

- 14. Expand the ASHRAE Nominating Committee's role and responsibilities** to act as a Leadership Development Committee for the Society by:
- a. Identifying, mentoring, and nurturing upcoming leaders through Coaching and Mentorship programs.
 - b. Hosting regular events such as Town Halls, Social Events or seminars at the Society and Chapter levels on how to Become a Leader in ASHRAE.
 - c. Identifying streamlined processes for advancement in ASHRAE such as appointments of Grassroot Committee Members and Board Members.

Creating a Pipeline of Leadership Talent

Source: The State of Diversity in Nonprofit and Foundation Leadership. Battalia Winston

Of course, creating sustained diversity at the leadership level is easier said than done. While diversity of the population is increasing across the country, the representation of people of color in C-suites is decreasing. If organizations want to leverage, not export, the diverse talent in their communities, they need to invest in diversity initiatives, create inclusive cultures, and foster a pipeline of leadership talent.

To create enduring diversity, organizations must implement strategies that span the talent management cycle:

Embedding diversity organization-wide

Nonprofits and foundations should aim to create diversity in all aspects of the organization, from their employee bases to their vendors and suppliers to the community should engage in a succession management process—sponsoring and mentoring future leaders, preparing them for a potential promotion, and encouraging diverse candidates to express their interest. Don't wait until there is an actual vacancy. Begin the grooming process early and implement professional development programs.

Fostering a culture of inclusion.

If organizations want to attract and retain diverse talent, they must create a culture that truly embraces diverse opinions, perspectives and lifestyles. There are a number of ways to achieve this: creating diversity committees with representatives from all levels and making diversity goals a transparent part of the overall strategic plan, for example. Organizations can also offer flexible working schedules, accommodations for all religious holidays and diversity-friendly dress codes.

Creating clear career paths

If an employee cannot see their career path within the company or easily identify an opportunity to advance, he or she is less likely to stay for the long haul. Establishing professional development and inclusive leadership training programs can help diverse employees see the organization as a place to grow, not a stepping-stone to something bigger and better. It is also important to create mentorship programs that intentionally include diverse employees, who—in a mostly white environment, especially—are less likely to receive organic mentorship and networking opportunities than their white counterparts.

Proactively identifying high-potential diverse talent

Employers should also be aware that, as baby boomers retire, they can add diversity on the tail end of the employee lifecycle. Leadership.

Conclusion

Without a focused effort on retention of employees from diverse backgrounds at mid and senior levels, companies risk becoming revolving doors for entry-level talent, with plenty of diversity in their junior ranks but with little at the mid and senior level. A concerted retention program will perpetuate diversity and help employees see the appeal of remaining in a diverse community, despite attractive offers from competitors. organizations they partner with and support.

Anticipated Fiscal Impact

The goal of DEI efforts is to improve society. Understanding and removing barriers to equity and inclusion through programs, education, and advocacy will ultimately widen and increase membership. The fiscal impact of additional members and a more engaged volunteer base has not been quantified.

The following table indicates that an investment over the next 3 years should be sufficient to permanently move the yardsticks within the society with the development and implementation of a robust and progressive DEI program. Ongoing costs after the first three years will need to be assessed following the second year of program implementation.

	Recommendation	Yr. 1	Yr. 2	Yr. 3	Total	Notes
1	Form a Board of Director DEI Advisory Subcommittee					Absorbed under existing budget
2	Develop Chapter and Society Programs	\$12,500	\$12,500	\$5,000	\$30,000	Phased rollout of programs
3	Expand ASHRAE's Discrimination and Harassment Policy					Volunteer time
4	Establish a DEI Program for Employees	\$15,000	\$5,000	\$5,000	\$25,000	Outside consultant fees only
5	Institute DEI Member Survey	\$15,000			\$15,000	Outside consultant fees only
6	Rename and Rebrand YEA	\$3,000	\$2,000		\$5,000	Allowance for reprinting select materials
7	Increase the Female Membership					Initiatives funded through existing MP budgets; positive revenue anticipated
8	Require Demonstration of DEI initiatives for MOU Partners					Cost to implement anticipated to be negligible
9	Establish Requirements for ASHRAE Research Bidders					Cost to implement anticipated to be negligible
10	Enact a Purchasing Policy	\$3,000			\$3,000	Staff time to initiate, competitive process expected to render cost neutral results
11	Incentivize DEI Chapter and Regional Programs through PAOE					Volunteer time
12	Develop Partnerships with Other Organizations					Volunteer time
13	Form an Industry DEI Leadership Group					Volunteer time
14	Expand ASHRAE Nominating Committee's Role and Responsibilities	\$5,000	\$5,000	\$5,000	\$15,000	Budget to deliver programs
	Total	\$53,500	\$24,500	\$15,000	\$93,000	

Appendix A – Board DEI Advisory Subcommittee

Purpose

To advise and engage the Board of Directors on:

- all matters relating to diversity, equity and inclusion - with a view to improving organizational awareness and performance in these areas amongst both staff and the Society membership.
- Establish annual budgets for DEI program and ongoing initiatives.
- the prioritization of inclusivity issues which have relevance to ASHRAE, together with plans for addressing these issues.

Subcommittee Makeup

- Chair and Vice Chair appointed annually by the President Elect
- Up to six Board members appointed for a term of up to three years, members to include as many past members of CEC, Membership Promotion, YEA and Student Activities as practical.
- Up to two consultants with specialist knowledge and expertise who are not Board members may be appointed to the panel at any one time.
- Membership shall be reviewed yearly, with a view to striking a balance between expertise/experience and optimizing turnover of membership for continuity and fresh ideas.

Terms of Reference

1. To report to the Board twice a year.
2. To recommend to the BOD actions to increase and improve inclusion within ASHRAE and the HVAC&R Industry and help the Society meets its commitments to fairness and equal opportunities. Recommendations would be expected to apply to
 - Appointments
 - Honors and Awards
 - Technical Group Membership
 - Volunteer Engagement
 - Chapter programs and initiatives
3. To monitor inclusion within the Society and assist the BOD by advising on policies and initiatives to improve inclusion amongst the membership.
4. To keep under review the Society's policy and practices relating to equity and diversity.
5. To set and publish goals based on our gaps and missing indicators

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6. Advise the BOD on the nature of the data to be collected from current members and applicants that may improve inclusion.
 7. To facilitate communications between ASHRAE and other relevant organizations, and to work in collaboration with them, to promote and embed inclusion and diversity in the engineering, construction, and related sectors.
 8. To recommend Chapter and Society programs on DEI (webcasts, training and education program, Insight Articles, forums, conferences, and webinars)
 9. To publish and regularly showcase the work of inspirational HVAC&R engineers from under-represented groups.
 10. Develop/source society training programs to members on DEI including, but not limited to;
 - sexual harassment
 - high performance team building
 - recognizing and avoiding unconscious bias

Appendix B – The Forty Factors

Adapted from; Accenture Culture Report; <https://www.accenture.com/ca-en/about/inclusion-diversity/acnmedia/Thought-Leadership-Assets/PDF-2/Accenture-Getting-To-Equal-2020-Research-Report.pdf>

40 FACTORS THAT INFLUENCE ADVANCEMENT AND CHARACTERIZE A CULTURE OF EQUITY FOR EMPLOYEES

BOLD LEADERSHIP

1. Gender diversity is a priority for leadership
2. A diversity target or goal is shared publicly
3. The Society clearly states gender pay gap goals and ambitions to staff
4. Progress on gender diversity is measured and shared publicly
5. Management is held accountable for improving employee gender diversity
6. Diversity targets or goals for employees is shared inside the Society
7. The leadership and management teams are diverse

COMPREHENSIVE ACTION

8. Progress has been made in attracting, retaining, and progressing women
9. Employees have women's network open only to women
10. Employees have a women's network that is open to all
11. Employees are encouraged to take parental leave
12. Employees trust that the Society pays all equally for the same work
13. The proportion of women in senior leadership and management has increased over the last five years
14. Management is fully committed to hiring, progressing, and retaining women
15. Progress has been made in improving gender equity in senior management and leadership
16. There is a clear maternity policy in place for employees
17. Women employees are encouraged to take maternity leave
18. There is a clear parental policy in place
19. The Society hires people from a variety of backgrounds
20. Leaders and management take action to get more women into senior roles

EMPOWERING ENVIRONMENT FOR EMPLOYEES

21. Employees have never been asked to change their appearance to conform to company culture
22. Employees have the freedom to be creative and innovative
23. Virtual/remote working is widely available and is common practice
24. The Society provides and supports training to keep its employees' skills relevant
25. Employees can avoid overseas or long-distance travel via virtual meetings
26. Employees can work from home on a day when they have a personal commitment
27. Employees are comfortable reporting sexual discrimination/harassment incident(s) to management
28. Employees feel trusted and are given responsibility
29. Employees have the freedom to be themselves at work
30. Leaders has a positive attitude toward failure
31. Leaders set a positive example around work-life balance
32. Networking events with leaders take place during office hours
33. Employees can decline a request to work late without negative consequences
34. Employees can decline a request to attend early-morning/late-evening meetings without negative consequences
35. Sexual discrimination/harassment is not tolerated
36. The Society has made progress in reducing tolerance of sex discrimination or gender-biased language
37. Society training times and formats are flexible
38. Leaders and management respond favorably to flexible working requests
39. Leaders and management respects employees' needs to balance work with other commitments
40. Leaders and management has made progress on building a workplace where no one feels excluded