BETTER TOGETHER

GUIDANCE FOR AGENCIES AND CLIENTS TO SUPPORT AND GROW INCLUSIVE TEAMS

OCTOBER 2023

ACKNOWLEDGMENTS

The guidance included in this document represents best practices culled from diversity, equity and inclusion (DEI) leaders across Member agencies for the U.S. marketplace as of October 2023. It **should not be construed as legal advice**; rather, it is for instructional purposes only. Neither the PR Council, its contributing Member agencies or their leaders, successors or assigns will be liable in whole or in part for any reliance on this guidance document.

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INTRODUCTION

Data confirms that diverse and inclusive agencies will outperform the marketplace. The PR Council is committed to helping build inclusive and equitable agencies by offering networking and knowledge-sharing sessions, designing learning workshops and providing benchmarking data.

Creating agencies where everyone feels a sense of belonging and is able to do their best work is critically important and progress takes time. In late 2022, the PR Council and FleishmanHillard convened a group of DEI leaders to explore ways to accelerate progress. Sharing a strong belief in "better together," the leaders acknowledged that while they may compete for talent, agencies share many areas for improvement and can learn from one another.

The first session focused on identifying the problems DEI leaders currently face as they work to affect change in their agencies. A need shared by many was **best practices for client and agency integration to foster inclusive teams**. A smaller group of DEI experts then identified the following recommended actions to support truly inclusive teams (on both sides) and proposed a model “accord” for agencies and clients to develop and retain diverse talent.

CREATING A WIN-WIN

Agency and client teams are interdependent. In the most successful partnerships, it can be hard to tell who is on which team. Joining forces to advance inclusion and equity is mutually beneficial, and true progress is only possible when both sides are fully committed.

THE RFP/PITCH PROCESS

The relationship begins here, so we encourage clients and agencies to agree to a set of principles from the start. Ideally, the following commitments would be shared and agreed upon as an initial step before the RFP is even issued.

The group suggested the following agreements:

1. Both the client and agency agree to the same transparency standards related to DEI metrics reporting during the pitch process.

Clients should share their own DEI-related data points to clearly communicate their priorities and commitment to transparency. "Diversity" is a broad category; therefore, clients and agencies should be clear on their priorities and why. For example, is their goal to ensure that the communications teams bring expertise in the target audience of buyers? Does the company seek to recruit and retain a more equitable and inclusive workforce?

2. We believe that qualitative data — for example, the steps that have been taken to eliminate bias and discrimination and ensure a sense of belonging — is just as insightful as quantitative data and will give equal weight to both sets for each signatory party during a respective pitch.

Demographic data can provide a broad picture of diversity, but it does not always reveal a company's overall commitment to equity and inclusion or their progress. Much can be learned by examining a company's smaller wins. Therefore, as a group, we believe additional streams of information, including more qualitative data, are an important window into a potential partner's DEI commitment.

3. We believe authentic actions — large and small — taken by both the client and agency in support of long-term sustained DEI efforts are more beneficial than performative displays of metrics that are not reflective of actual employees.

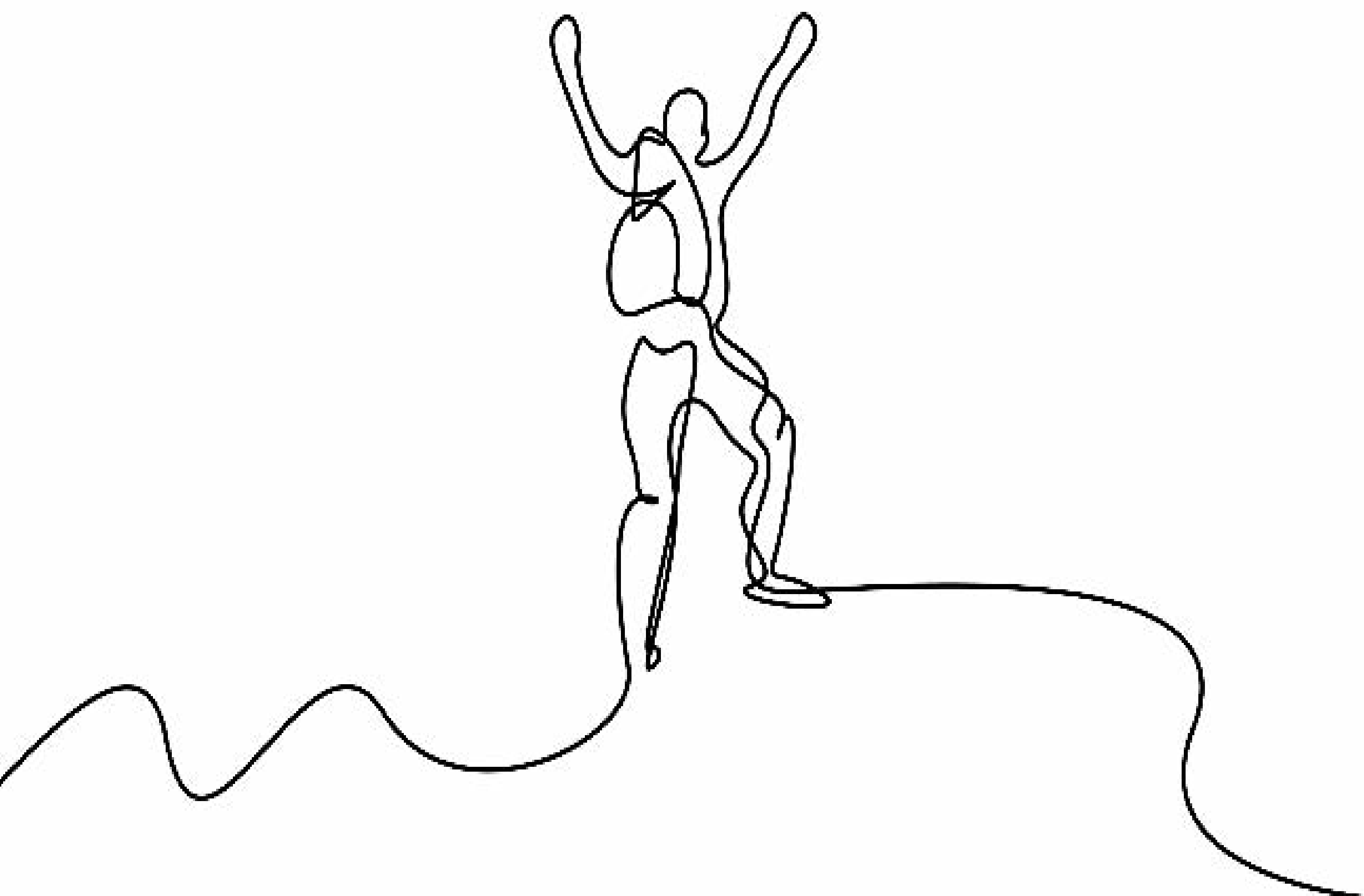
Again, numbers and data points are important, but they can be manipulated in numerous ways to tell different stories, none of which are reliable indicators of the *actual experience* of all talent at an agency. We care deeply about whether people can be themselves, do their best work and grow their careers.

4. We will neither engage in tokenism by placing employees who represent a particular demographic on pitch teams if they will have no actual role in pitch processes, nor will we ask these representatives to "sit in" on pitch meetings solely for show from the agency side or the client side.

We are committed to thoughtful partnerships with clients to achieve goals. Can we work together to determine the ideal team for the client business? If it is not possible for the agency to present the ideal team with audience expertise for the pitch, how can we build it together, and what is the timeline? Partnering to identify and develop talent with the right expertise will lead to a much better outcome for the agency-client relationship.

5. Requests for identifiable information on an account team that will jeopardize the privacy of talent should not occur. Instead, request the client team's plan for diversifying the team to bring the right marketplace expertise.

Recommend that a client share their three most important business strategies to achieve DEI and invite the agency to provide information on how their strategies align and/or ways they can provide support. For example, if the client has supplier diversity goals, they might ask the agency to provide tangible information on how they can achieve these goals.



CHALLENGES OF REPORTING DATA

Sometimes misconceptions of basic DEI principles, especially when it comes to reporting on workforce data, exist on the client or agency side. The following aims to eliminate confusion:

- Requirements for reporting workforce diversity data vary across countries, and in some cases, the act of data collection is illegal.
    - If there are country requirements, not all dimensions may be counted, which is why most global DEI reports disclose the following data points:
        - Gender — Male/Female
        - Board Representation — Gender/Race
        - Senior Leadership Team — most likely Male/Female breakout, occasionally with racial ethnicity breakout (U.S. only)
        - Racial/ethnic diversity breakdown for U.S. employees only
- Companies that have a U.S. presence are required by law to report on the diversity of U.S. employees via the EEO-1 form under these circumstances:
    - *"Employers who have at least 100 employees and federal contractors who have at least 50 employees are required to complete and submit an EEO-1 Report (a government form that requests information about employees' job categories, ethnicity, race and gender) to the U.S. Equal Employment Opportunity Commission (EEOC) and the U.S. Department of Labor (DOL) every year."*
        - It is important to note companies do not have to disclose this information beyond reporting to the U.S. Department of Labor via the EEO-1 form.

Sometimes requests sent to agencies for data for the global workforce have included:

- Women employees

- LGBTQ employees
- Disabled employees
- Minority employees (no request for breakdown of this category or definition was provided)

Asking for this type of data suggests that agencies are expected to make employment-related decisions, such as assignment of accounts and projects, based on protected characteristics, which would run afoul of Title VII. Further, these types of requests do not recognize that most companies encourage people to self-identify sexual orientation, disability or veteran status because these categories are not tracked via EEO-1 requirements in the U.S. or globally.

These requests create a situation in which agencies might feel inclined to go against DEI best practices by taking it upon themselves to “count” people based on their perceptions of a person’s visual identity or behaviors, which can harm people who fall into these communities and perpetuate bias. This can be considered unethical and even illegal in certain regions.

ONBOARDING, RECRUITING AND STAFFING PLANS TO PROMOTE EQUITY AND INCLUSION

ONBOARDING

The best time to conduct a DEI onboarding questionnaire is when entering a new relationship with a client as part of the onboarding process. This is the time when teams begin to agree on the norms of decision-making and ways of working.

Onboarding a new client can be a formal or informal process depending on the relationship, the PR agency culture and the client's internal culture. It may take more effort to interrupt the habits and norms of engaging with an existing client.

FORMAL CLIENT PROCESS

Some clients expect a formal key stakeholder interview, presentation and onboarding process. These clients have more training and higher expectations for team norms and feedback. They are ideal for this template of questions. Embedding the appropriate approach and questions demonstrates to the client the priority of building a long-term, proactive, people-first approach to the relationship.

INFORMAL CLIENT PROCESS

Other client relationships are fast-moving and feature informal relationship-building, with less of an emphasis on the people-focused dynamics in the partnership. Onboarding these clients through the lens of DEI will take a less formal and more artful dance to achieve the same impact. There are two types of clients in the informal group:

a. "Get to know you" to establish norms — some clients place a high value on relationship-building and expect an agency partnership that is cohesive and thoughtful from the start and will appreciate a thoughtful kickoff to establish team norms.

b. "Just start the work" — other clients are more focused on just getting the work started. These questions may be asked in key moments in the first six months or at a milestone review moment.

Ideally, the client contact will take the lead in the new relationship and can set the expectations for the team. This client lead will provide an overview of the agency's DEI expectations. Some questions to consider:

1. On a scale of 1-5, how would you rate your company's DEI journey? Why?
2. May we walk you through our DEI strategy and goals to ensure we are aligned on our priorities?
3. On a scale of 1-5, how important is it to have a team with expertise targeting the same customer demographic?
4. How can we hold ourselves accountable for respect and inclusion?
5. How can all voices be heard? Are there communication styles, personality types or other context to be taken into consideration so that everyone can contribute to the conversation?
6. How might we agree to quickly address bias and subtle acts of exclusion?
7. What is our norm for rules of engagement? Helpful topics for discussion include receiving feedback, who runs the agenda, how might we brainstorm to hear all voices.
8. How might we create an environment that supports empathetic feedback?
9. How often might we do a check-in on our norms? Do all participants feel heard?
10. How might we check in to align around our DEI values as partners? What do we need to adjust?
11. Do you employ any assessments or tools designed to get the most from the team's work and communication style that we should be aware of?

STAFFING PLANS FOR INCLUSION

Getting the staffing right to ensure that inclusive communications and bias mitigation are at the forefront starts at the beginning of the client engagement. Identifying the right team is not only looking at skills (which are varied) but also diverse cultural identities and experiences, cultural competence and more. Thus, we suggest an intake template to help teams ensure they are staffing inclusively and managing biases with the following:

1. Are we aligned to the clients' DEI goals and priorities?

2. Are we providing expertise and experience in targeting the customer demographic? (age, race/ethnicity, sexual orientation, ability, etc.)?

3. Is there high potential from diversified backgrounds who should be on the team for succession planning and development?

4. Are we creating accounts led by a diversified talent group with advancement and retention in mind?

5. Have we brought in talent development to connect the work with people development processes and tools?

6. Have we considered the work style, communication style and strengths to complement the team? What accommodations can we make to add cultural competency and flexibility to the team?

7. Will there be opportunities for strategic recruiting of a diversified talent population in the near term (e.g., six months) we should consider for our pipelining?

8. Is the current lead prepared to support, mentor and champion talent from a diversity of backgrounds?

A SHARED COMMITMENT TO COUNTERACTING BIAS

A SHARED COMMITMENT TO MANAGING BIAS

The following is an agreement that is intended to be signed by client and agency — CEOs and CCOs, agency's client lead and senior client appointed to lead agency relationship, or every person on the collective team. We offer this as an ideal accord that can be customized as needed.

ACCORD

Producing innovative, compelling and effective work requires intentionality and communication. Discrimination and bias are hindrances to productivity and go against our shared mission, values and goals as partners. We are committed to building and nurturing a high-performing, inclusive and equitable team. We aim to maintain a healthy relationship that supports and grows all talent. To that end, we agree to the following shared commitments during our engagement together.

1. Language and Storytelling

- We believe that language is powerful. We embrace a people-first approach to language in order to be respectful and inclusive of the experiences of all communities and cultures.

- We know that language is ever-evolving and will remain open to change in how we describe and talk about all communities.

- We will try our best to use asset-based language instead of deficit language to describe people and communities. Asset framing is a narrative model that defines people by their aspirations and contributions before exploring their deficits or problems.

- Examples of asset language: global majority, young people living in challenging circumstances

- Examples of deficit language: minority, at-risk youth

- We know that visual language can be just as — or even more — powerful as written and spoken language, especially in the digital age. We will consider the importance of representing all differences through images and art as part of our storytelling process and will be as fair and accurate as possible in our depictions.

- We will always strive to create content that is ADA compliant (or compliant with the relevant governing body in non-U.S. jurisdictions) to develop stories that can be consumed by all people, including those with a visual or aural disability.

- We are fully committed to diversity, equity and inclusion both internally by creating and maintaining an inclusive work culture with safe spaces for our staff to grow and thrive and externally in how we serve our clients and customers. As such, we will share with each other our DEI statement that enshrines our belief in the power of DEI to learn, work and build community. This is one way for our organizations to show our commitment to these ideals. The other will be through our actions.

2. Learning and Development

- We commit all team members from the agency team and the client team to completing a minimum of four hours of DEI workshops over the course of one fiscal year, during an agency/client contractual period. Said L&D topics may cover: Inclusive/Empathetic Leadership; Unconscious Bias; Relational Health; Allyship; Anti-X racism — such as Anti-Black racism or Anti-Asian racism, focusing on any racially marginalized class of individuals; Understanding and support for the LGBTQIA+ community; Understanding and support for disabled/differently-abled persons; Understanding and support for mental health wellness; Understanding and support for individuals as caretakers (for children, parents and family members).

    - A DEI practitioner resource guide endorsed by the PR Council will be included in the contract appendix. The most beneficial DEI workshops include interactive components for the trainees to engage in listening to one another, storytelling and active role-playing — our shared goal is for employees to adopt lasting practices that will aid them in their journey to become perpetual bias-interrupters and allies.

- We commit to an open-invitation policy for co-team L&D, to invite client team members to any planned agency DEI events and vice-versa.

- We encourage all agency and client team members to self-educate on an ongoing basis and include DEI goals within their annual key performance metrics, striving for one self-education goal per quarter, which may include: leading a courageous conversation, helping to organize an employee DEI session, reading an article, listening to a podcast, watching a video or film, etc.

3. Style Guide for Content Creation

- We commit to adhering to a mutually approved DEI style guide at the start of the contractual period as a guiding tool for content creation. Successful DEI guides should address language to avoid that creates bias and language to use as an alternative.

Examples include:

- Avoid: Grandfathered In
  Instead use: Exempted
  Why: Post Civil War, only White persons were grandfathered in to vote.

- Avoid: Spirit Animal
  Instead use: Like Minds
  Why: Cultural appropriation by non-indigenous persons is discriminatory.
  (The AP style guide section on inclusive storytelling is an excellent reference, along with the DEI style guides developed by Diversity Style Guide and GLAAD.)

  - We understand that content creators have the power to give marginalized voices agency and create implicit associations of consumers in the marketplace.

- DEI style guides often create rules of engagement for a client/agency team to utilize at the start of a project, such as: Define, Redefine, Audit, Repeat. Such rules entail making sure the right expertise to reach target audiences is represented on both teams, a co-commitment to examining the target audience, and assessing whether "aspirational" goals should become "essential." Additionally, it is paramount that client/agency teams build in focus groups and checkpoints throughout the development of a project to check for hidden biases as they prepare to launch.

4. Accountability

- We commit to encouraging each team member to take ownership of their personal behaviors and actions, which include verbal, written and unspoken interpersonal communications that may have unrealized negative connotations. We advocate for the adoption of a successful communications tool, such as "OTFD (Open The Front Door) — Observe, Think, Feel, Desire" (from the Learning Forum).

    - When a team member feels as though a bias is at play, or a micro-aggression has been committed against them or against another, we encourage all team members to immediately alert the pre-determined team leader to create learning and coaching moments with one another, on a consistent basis.

- We understand that the road to a successful DEI working relationship will not be without bumps, but we agree to share the responsibility of working together to address concerns candidly and quickly as they arise. A point person, typically the team leader, will be designated for both the client and the agency to address concerns in the moment. In the event of a potential misstep, that point person will:

    - Listen to the team member's concerns and gather relevant information.

    - Involve HR and DEI professionals to ensure the situation is appropriately handled and to protect both entities and the people involved.

    - Ask questions:

    - What happened? What was the behavior? What were the words?
    - What was done?
    - What impact did it have on you?
    - Is this an ongoing concern or a single incident?
    - When did this occur?
    - Have you addressed this concern directly with the individual(s)? If so, what did you say and what was the response?
    - Do you think there remains a lack of understanding about what was said?
    - What follow-up or next step would make you comfortable in your work on this team?
- Raise, investigate and address issues in a candid and timely fashion. Remind the individual about the shared DEI working commitments and individual expectations. Offer education if appropriate.
  - Without judgment, explain the behavior of concern.
  - Clarify and explore how that behavior impacted the ability of another person to be their best and most authentic self while working on this engagement.
  - Get input on what this individual thinks might be done together to address this issue and move forward.
- Document the incident(s) for both agency and client team leads.
- If the issue is not resolved or a pattern continues, escalate to internal management or education.
- If initial discussions and education fail to correct the situation, a decision

should be made about temporarily or permanently removing an offending team member from the joint work.

- Review: Once the matter at hand has been addressed, agency and client team leads will discuss measures that should be added moving forward, and any other potential changes needed to inter-team communications. If appropriate, a joint workshop or adjustments to working relationship agreement may be put into place.

5. Evaluation

- As with regular program reviews, we commit to periodic review of our joint DEI efforts and our alignment with the above four commitments.
- We will jointly share and celebrate successes and help each other where progress has stalled.
- A data-driven approach, coupled with transparency and accountability, sets the stage for meaningful DEI change. Where possible, expectations will be established early in an engagement, and specific annual targets will be agreed to and reported against.
    - Quantitative data may include team diversity makeup, retention and advancement.
    - Qualitative evaluation may include team surveys examining integration, psychological safety, sense of belonging, trust, opportunities for growth and other metrics important to both organizations.
- We will also share progress against evolving client and agency DEI efforts, particularly where those initiatives might be adopted in some way by the partner organization.
- Metrics may be used to individually and jointly identify risk areas, prioritize efforts, set goals and determine impact of initiatives.

Agency partner commits to public recognition on website and in appropriate marketing materials of clients that agree to this set of shared PR Council commitments.

Agency:

Signatory:

Agency DEI Statement:

Client:

Signatory:

Client DEI Statement:

PR COUNCIL

THANK YOU

The PR Council is a trade association focused on helping grow Member agencies and the overall industry through education, events, thought leadership and industry resources.

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