

Opportunity Enterprises, Inc.
UNIVERSAL POLICIES AND PROCEDURES
HUMAN RESOURCES
POLICY#: 2024— DIVERSITY, EQUITY AND INCLUSION

POLICY

Opportunity Enterprises, Inc. (OE) is committed to fostering, cultivating and preserving a culture of diversity, equity and inclusion. OE's employees are their most valuable asset. The collective sum of the individual knowledge, unique capabilities and talent that our employees invest in their work represents a significant part of our culture and reputation.

We embrace and value our employees' differences in age, color, disability, ethnicity, family or marital status, gender identity or expression, language, national origin, physical and mental ability, political affiliation, race, religion, sexual orientation, socio-economic status, veteran status and other characteristics that make our employees unique.

PROCEDURE

1. OE's diversity initiatives are applicable—but not limited—to our practices and policies on recruitment and selection; compensation and benefits; professional development and training; promotions; transfers; social and recreational programs; layoffs; terminations; and the ongoing development of a work environment built on the premise of gender and diversity equity that encourages and enforces:
 - a. Respectful communication and cooperation between all employees;
 - b. Teamwork and employee participation, permitting the representation of all groups and perspectives;
 - c. Work/life balance through flexible work schedules to accommodate employees varying needs; and
 - d. Employer and employee community involvement which promotes greater understanding and respect for diversity.
2. All OE employees have a responsibility to treat others with dignity and respect. All employees must exhibit conduct that reflects inclusion during work, at all work functions, and at all OE sponsored events.
3. Any employee found to have exhibited any inappropriate conduct or behavior against others may be subject to immediate disciplinary action.
4. Employees who believe they have been subjected to discrimination or harassment and conflict with OE's diversity policy and OE initiatives should seek assistance from OE's Human Resources department.

Opportunity Enterprises, Inc.
UNIVERSAL POLICIES AND PROCEDURES
HUMAN RESOURCES
POLICY#: 2024— DIVERSITY, EQUITY AND INCLUSION

Signatures of Approval:

| | | | |
|---|----------------------------|-------|-----------------------|
| CARF Controller: | <u><i>Jim Roblin</i></u> | Date: | <u><i>7/20/22</i></u> |
| Chief Human Resources Officer: | <u><i>Sanderson</i></u> | Date: | <u><i>7.19.22</i></u> |
| Chief Financial Officer: | <u><i>Wm Fong</i></u> | Date: | <u><i>7/19/22</i></u> |
| Chief Program Officer: | <u><i>Yolanda Hill</i></u> | Date: | <u><i>7.19.22</i></u> |
| Chief Development & Communications Officer: | <u><i>Racie Ensign</i></u> | Date: | <u><i>7.19.22</i></u> |
| President/CEO: | <u><i>[Signature]</i></u> | Date: | <u><i>7.20.22</i></u> |

Cultural Competence and Diversity Plan

Policy:

Corvilla is committed to creating and maintaining an environment that supports “Cultural Competence” by promoting respect and understanding of diverse cultures, social groups, and individuals. Corvilla does not discriminate in its admission, hiring, or business dealings based on race, cultures, age, gender, sexual orientation, spiritual beliefs, socioeconomic status, languages, ethnic backgrounds, and religions in a manner. Corvilla recognizes, values, affirms, and respects the worth of the individuals and protects and preserves the dignity of each person served, employee, and stakeholder. Corvilla adheres to the equal employment opportunity policy and non-discrimination practices.

PURPOSE:

The Corvillla Cultural Competency and Diversity Plan will help ensure that clients receive care that is delivered in a culturally sensitive manner. The Cultural Competency and Diversity Plan incorporates all clients, staff, and stakeholders. Corvillla recognizes that respecting the diversity of our clients, staff, and stakeholders has a significant and positive effect on outcomes of care.

DEFINITION:

Cultural Competence is an awareness of, respect for, and attention to the diversity of the people with whom it interacts (persons served, personnel, and other stakeholders) that are reflected in attitudes, organizational structures, policies, and services.

GUIDING PRINCIPLE:

The purpose of the DIVERSITY philosophy is to facilitate an active and purposeful initiative to educate, train and recruit people in a way that strengthens the diversity and inclusion efforts at Corvillla. We recognize and acknowledge that our world does not currently provide that kind of enrichment for all. DIVERSITY exists to intentionally address the concerns of our employees and supporters regarding inclusion, accessibility, and diversity.

Different
Individuals
Valuing
Each other
Regardless of
Skin color, gender
Intellect
Talents or
Years

GOALS:

1. Corvilla utilizes a system of care that is culturally competent. Cultural Competence is embedded in all organizational components.
2. Corvilla strives to promote inclusion, accessibility, and respecting individuality.
3. Corvilla's DIVERSITY Team will meet regularly and evaluate any needs and suggest changes as needed.
4. Corvilla recruits, retains, and develops a culturally diverse workforce at all levels of the organization.
5. Corvilla helps to assure that all employees are tolerant of all cultures by implementation of a training program that promotes cultural awareness and tolerance.
6. Corvilla promotes and supports the involvement of advocacy into clients programming.
7. Corvilla addresses identified language barriers in all stakeholders, verbal and nonverbal, with training, consultants, hiring practices, and any other needed assistance.

Origination Date: April 2016

Last Review/Revision: March 2021

Reviewed March 2022

Reviewed March 2023

Approved: Corvilla's Board of Directors

5. K. POLICY REGARDING CULTURAL COMPETENCY AND DIVERSITY

Purpose: To ensure Goodwill recognizes, embraces and values diversity in all aspects of our agency.

Responsibility: Client Services Director and Human Resources and Safety Director

Personnel Affected: All Goodwill Employees and Clients

Policy: It is the policy of Goodwill Industries to value diversity and to treat all individuals with honesty, dignity and respect while understanding and valuing their differences.

Procedures: Goodwill will provide training to all employees at new hire and annually thereafter regarding the importance of interacting appropriately with others who might have differences in not only race or culture, but also in age, education, religious beliefs, sex, sexual orientation, economic status, physical and mental abilities or others.

Goodwill will analyze both local demographics and those of our referral sources to ensure we maintain a diverse population.

Goodwill has developed a Cultural Competency and Diversity Plan, which is updated annually.

The Goodwill library has several books on diversity, and local training will be utilized as available.

Forms: R715 E.S New Hire Orientation Checklist
HR201A Orientation Checklist
E325 Cultural Competency and Diversity Plan

Date Adopted: **March 2012**

Date of Last Revision: **May 2013**

Date of Last Review: **March 2012, May 2013, May 2014, April 2015, May 2016, May 2017, April 2018, June 2019, Sept 2020, June 2021, May 2022, August 2023**

Goodwill Industries 2022 Cultural Competency, Diversity & Inclusion Plan/Outcomes

| Goal | Organizational Cornerstone | Action/Steps | Expected Outcome | Def. Sheet | Time Frame | Person Assigned | Actual Outcome |
|---|---|--|--|------------|------------|------------------------------|----------------|
| 1. Increase awareness of diversity and inclusiveness issues in the community. | Empowering Individuals; Enriching Local Communities | Participate in diversity and inclusion committee for NIHRA. | Diversity and inclusiveness events in the community. | No | Q1-4 2022 | Marita Crawfis | |
| Recommendations/Action Plan: | | | | | | | |
| 2. Ensure diversity and cultural competency training is available to staff. | Empowering Individuals; Advancing Mission-Integrated Social Enterprise; Enriching Local Communities | Provide trainings based on groups being served. | Staff who show competency working with a diverse population. | No | Q1-4 2022 | Randy Wolf Marita Crawfis | |
| Recommendations/Action Plan: | | | | | | | |
| 3. Increase the diversity of the staff. | Advancing Mission-Integrated Social Enterprise; Enriching Local Communities | Collect & analyze regional demographics and compare to workforce statistics. | A workforce that resembles our community. | No | Q1-4 2022 | Marita Crawfis | |
| Recommendations/Action Plan: | | | | | | | |

| | | | | | | | |
|---|--|---|---|----|-----------|------------------------------|---|
| 4. Provide sexual orientation/gender identity training to ES staff. | Empowering Individuals; | Obtain appropriate training materials and provide training. | Staff who show competency working with a diverse population. | No | Q1-4 2022 | Marita Crawfis Randy Wolf | Training was developed and provided to all employees. |
| Recommendations/Action Plan: | | | | | | | |
| 5. Provide disability and diversity training to the Board of Directors. | Empowering Individuals; Enriching Local Communities | Develop and provide Board training. | Board members with increased understanding of disabilities and diversity. | No | Q1-4 2022 | Randy Wolf Marita Crawfis | |
| Recommendations/Action Plan: | | | | | | | |
| 6. Develop inclusiveness training RE: LGBTQ+ for all employees. | Empowering Individuals; Enriching Local Communities | Evaluate workplace for ways to increase inclusiveness. Develop and provide training. | An inclusive workplace. | No | Q1-4 2022 | Randy Wolf Marita Crawfis | Training was developed and provided to all employees. |
| Recommendations/Action Plan: | | | | | | | |



CULTURAL COMPETENCY AND DIVERSITY PLAN 2020-2023

I. VISION AND INTENT

LOGAN puts a priority on ensuring that people with intellectual and developmental disabilities can live lives of choice and independence. We provide opportunities so that they may achieve their desired quality of life. LOGAN's roots are grounded in fighting social injustice, specifically for people with disabilities. 70 years ago, LOGAN was founded by a group of parents opposed to institutionalization for their children but rather wanted an education and a life for them in their home community. Today, LOGAN continues its advocacy to provide a higher quality of life for people with intellectual and developmental disabilities.

The reality is that the people LOGAN supports and serves extend well beyond those who receive LOGAN services. We have always been an organization that cares for the surrounding community. The people affected by our services also include the staff who provide those services, the families of those who receive those services, and the community in which those services are provided. To ensure that we demonstrate awareness of and respect for all whom we interact with, LOGAN has formed the **I.D.E.A. Focus and Planning Group (or, for short, I.D.E.A.)**

The purpose of I.D.E.A. is to focus on a more **Inclusive, Diverse, Equitable, and Accessible** application of LOGAN's mission, vision, and values. **LOGAN's values are respect, kindness, honesty, loyalty, and quality.** Our vision statement says that we strive to help create a community where kindness and dignity enrich the lives of everyone. The values and vision statement cannot be served if we do not begin the work to involve everyone, regardless of race, gender, sexual orientation, religion, socio-economic status, or any other cultural difference that exists in a company as large as LOGAN.

We recognize and acknowledge that our world does not currently provide that kind of enrichment for all. We acknowledge that individuals of different races, genders, sexualities, socio-economic statuses, and other cultures are greatly affected by the lack of inclusion, diversity, equity, and access today. I.D.E.A. exists to intentionally address the concerns of our employees, our clients, and our community regarding inclusion (who is invited), diversity (who is participating), equity (who is thriving), and access (whom we are serving). It is the job of the I.D.E.A. Focus and Planning Group to begin doing the work, seeking input and feedback from all those impacted by LOGAN along the way.

Guiding questions of the I.D.E.A. Focus and Planning Group are:

I – Inclusive: Is everyone's voice being heard and considered?

D – Diverse: Do we represent people with diverse characteristics, social backgrounds, genders, disabilities, and religious beliefs?

E – Equitable: Do our persons served, staff, and stakeholders have access to resources and opportunities?

A – Accessible: Have we reduced or eliminated barriers and created accommodations for persons served, staff, and stakeholders?

Over time, we will develop an ongoing learning process that positively effects issues related to culture, age, gender, sexual orientation, spiritual beliefs, socioeconomic status, language, and other areas of



discrimination. In doing so, we will strive to develop an environment that fosters inclusion, tolerance and respect for diversity in all forms.

II. STAKEHOLDER SURVEY

Stakeholders will be surveyed annually to gauge their perceptions of inclusion, diversity, equity, and accessibility at LOGAN.

In the survey for calendar year 2021, survey participants included LOGAN staff (161), clients (11), family members (29), and board/community members (8).

Respondent Break Down- 2021

- 52 people reported as Black/African American
- 1 person reported as American Indian or Alaskan Native
- 2 people reported as Asian
- 10 people reported as Hispanic/Latino
- 0 people reported as Native Hawaiian or Other Pacific Islander
- 198 people reported as White
- 18 people selected prefer not to say
- 1 person selected other

In the survey for calendar year 2022, survey participants included LOGAN staff (291), clients (7), family members (43), and board/community members (17).

Respondent Break Down- 2022

- 74 people reported as Black/African American
- 2 people reported as American Indian or Alaskan Native
- 2 people reported as Asian
- 7 people reported as Hispanic/Latino
- 0 people reported as Native Hawaiian or Other Pacific Islander
- 240 people reported as White
- 18 people selected prefer not to say
- 0 person selected other

In the survey for calendar year 2023, survey participants included LOGAN staff (71), clients (1), family members (1), and board/community members (0).

Respondent Break Down- 2023

- 4 people reported as Black/African American
- 0 person reported as American Indian or Alaskan Native
- 2 people reported as Asian



- 6 people reported as Hispanic/Latino
- 0 people reported as Native Hawaiian or Other Pacific Islander
- 55 people reported as White
- 0 people selected prefer not to say
- 0 person selected other

Based on the survey responses, we have identified six (6) priorities to address in the first year of our Cultural Competency and Diversity Plan. They are as follows:

1. Racism

Definition: a belief or doctrine that inherent differences among the various human racial groups determine cultural or individual achievement, usually involving the idea that one's own race is superior and has the right to dominate others or that a particular racial group is inferior to others.

2. Sexism

Definition: attitudes or behaviors based on traditional stereotypes of gender roles; discrimination or devaluation based on a person's sex or gender.

3. Genderism

Definition: discrimination based on gender. This could also refer to discrimination against others due to the belief that gender is binary, comprising male and female genders only.

4. Ageism

Definition: discrimination against persons of a certain age group; a tendency to regard older persons as debilitated, unworthy of attention, or unsuitable for employment or that young people are inexperienced and incapable of producing the same quality as those who are older.

5. Ableism

Definition: discrimination against disabled people, the tendency to regard people with a disability as incomplete, diminished, or damaged, and to measure the quality of life with a disability against a non-disabled standard.

6. Microaggression

Definition: a subtle but offensive comment or action directed at a member of a marginalized group, especially a racial minority, that is often unintentionally offensive or unconsciously reinforces a stereotype.

III. PLAN IMPLEMENTATION



The **I.D.E.A.** Focus and Planning Group has identified four focus areas (Pillars) to implement the plan's vision and intent.

1. Leadership
 - LOGAN's Officers and Directors intentionally listen to their staff, learn about diversity and inclusion, communicate with others, and lead by example.
2. Staff
 - Educate staff about the knowledge, skills, and behaviors necessary to effectively work cross-culturally by understanding, appreciating, and respecting differences and similarities in beliefs, values, and practices within and between cultures.
3. Clients and Families
 - Reduce and eliminate barriers and create accommodations to seek and serve clients and families of all backgrounds and cultures.
4. Board of Directors
 - Model inclusive behaviors by emphasizing diversity and inclusion as part of LOGAN's business strategies while creating an environment in which others can safely voice different opinions.

Detailed initiatives within each pillar are as follows:

1. LEADERSHIP

| Initiative | Description | Date |
|--|---|---------------|
| Social Justice presentation to Leadership Team | Savannah Smith, Board Certified Behavior Analyst in the Sonya Ansari Center for Autism, shared her perspective on social justice issues LOGAN staff face. | July 8, 2020 |
| Survey Results Presentation | Savannah Smith and Danica Keefe, I.D.E.A. Focus and Planning Group members, presented survey results. | March 3, 2021 |
| Leadership Team Meeting | Microaggressions: Cultural Differences and Stereotypes – guest speakers Francois and Assumpta Bayingana | April 7, 2021 |
| Leadership Team Meeting | Microaggression: guest speaker Eric Love – Recorded Presentation | May 5, 2021 |
| INARF Professional Development | Educational Webinar: Role of Implicit Bias | May 19, 2021 |
| Leadership Team Meeting | Sexism and Genderism: guest speaker Justine Backus | June 2, 2021 |



| | | |
|-------------------------|-------------------------------------|------------------|
| Leadership Team Meeting | Racism: guest speaker Steven Graves | July 7, 2021 |
| Leadership Team Meeting | Presented 2022 Survey Results | November 2, 2022 |

| Review Period | Setting | Comment |
|---------------|-----------------|---|
| Q2, CY2021 | Created | CEO and Officers – January 2021 |
| Q3, CY2021 | Officer Meeting | CEO and Officers – Reviewed August 2021 |
| Q4, CY2021 | Officer Meeting | CEO and Officers Reviewed – November 2021 |
| Q1, CY2022 | Officer Meeting | CEO and Officers Reviewed – January 2022 |
| Q2, CY2022 | Officer Meeting | CEO and Officers Reviewed – May 2022 |
| Q3, CY2022 | | |
| Q4, CY2022 | | |
| Q1, CY2023 | Officer Meeting | CEO and Officers – Review March 2023 |
| Q2, CY2023 | Officer Meeting | CEO and Officers – Review May 2023 |
| Q3, CY2023 | Officer Meeting | CEO and Officers – review August 2023 |
| Q4, CY2023 | | |

2. STAFF

| Initiative | Description | Date |
|--|---|-------------------------------|
| I.D.E.A. Focus and Planning Group begins | Employee-led group to address issues of inclusiveness, diversity, equitability, and accessibility | September 14, 2020 |
| Employee Survey | Survey to LOGAN stakeholders to gauge their perceptions of inclusion, diversity, equity, and accessibility at LOGAN | 1 st Quarter 2021 |
| Communicate Survey Results – LOGAN staff | Email to LOGAN staff | May 2021 |
| Management Training | Leadership development and education to managers in all levels of the organization: Module 3 Topic – Cultural Diversity | January, February, March 2022 |
| Communicate Plan to staff | Matt Harrington, President & CEO, to communicate Cultural Competency and Diversity Plan to staff | April 2021 |
| Recruit additional I.D.E.A. members | Current members seek to add staff, representing a broad range of LOGAN programs and demographics. | April-May, 2021 |
| United Way of Southwestern Michigan | 21-Day Racial Equality Challenge: Self-guided learning (Impacts of racism shaping lives of people in SWMI) | June-July 2021 |



| | | |
|---------------------------|---|--|
| Paylocity Learning Module | Assign DE&I education to all employees via the Paylocity electronic platform. Learning Module 3 Part Series – “The Science Behind Unconscious Bias” | Oct – Nov 2021 (Module 1) Dec 21 & Jan 22 (Module 2) Feb – Mar 2022 (Module 3) |
|---------------------------|---|--|

| Review Period | Setting | Comment |
|---------------|--------------------------|---|
| Q2, CY2021 | Created/Officers Meeting | CEO and Officers – January 2021 CEO and Officers – Reviewed May 2021 |
| Q3, CY2021 | Officer Meeting | Officers – Reviewed August 2021 |
| Q4, CY2021 | Officer Meeting | CEO and Officers – Reviewed November 2021 |
| Q1, CY2022 | Officer Meeting | CEO & Officers – Reviewed January 2022 |
| Q2, CY2022 | Officer Meeting | CEO and Officers – Reviewed May 2022 |
| Q3, CY2022 | | |
| Q4, CY2022 | | |
| Q1, CY2023 | Officer Meeting | CEO and Officers – Review March 2023 |
| Q2, CY2023 | Officer Meeting | CEO and Officers – Review May 2023 |
| Q3, CY2023 | Officer Meeting | CEO and Officers – review August 2023 |
| Q4, CY2023 | | |

3. CLIENTS AND FAMILIES:

| Initiative | Description | Date |
|---------------|--|------------------------------|
| Survey | Survey to LOGAN stakeholders to gauge their perceptions of inclusion, diversity, equity, and accessibility at LOGAN | 1 st Quarter 2021 |
| Education | Created informational flyers and foam posters about the purpose of I.D.E.A. Marketed special informational ads/photos via internal lobby televisions to promote I.D.E.A. to clients, parents and guardians within our many facilities. | 3 rd Quarter 2021 |
| Accessibility | Web translator for the LOGAN website to reach all groups. | 4 th Quarter 2022 |
| Accessibility | Meet area diverse groups where they are and talk to their leaders, advertising LOGAN services and LOGAN’s interest in serving diverse groups of clients. | 2022 |
| | | |



| Review Period | Setting | Comment |
|----------------------|--------------------------|---|
| Q2, CY2021 | Created/Officers Meeting | CEO and Officers – January 2021 CEO and Officers – Reviewed May 2021 |
| Q3, CY2021 | Officer Meeting | Officers – Reviewed August 2021 |
| Q4, CY2021 | Officer Meeting | CEO and Officers – Reviewed November 2021 |
| Q1, CY2022 | Officer Meeting | CEO and Officers – Reviewed January 2022 |
| Q2, CY2022 | Officer Meeting | CEO and Officers – Reviewed May 2022 |
| Q3, CY2022 | | |
| Q4, CY2022 | | |
| Q1, CY2023 | Officer Meeting | CEO and Officers – Review March 2023 |
| Q2, CY2023 | Officer Meeting | CEO and Officers – Review May 2023 |
| Q3, CY2023 | Officer Meeting | CEO and Officers – review August 2023 |
| Q4, CY2023 | | |

4. BOARD OF DIRECTORS:

| Initiative | Description | Date |
|--|--|---------------------|
| Governance Committee Presentation and Discussion | I.D.E.A. concept presented by committee/I.D.E.A. member Bianca Tirado. Open committee member discussion. | October 14, 2020 |
| Board Meeting Presentation and Discussion | I.D.E.A. concept presented by board/I.D.E.A. member Bianca Tirado. Open board member discussion. | October 20, 2020 |
| Governance Committee discussion | Discussed the upcoming survey. | February 10, 2021 |
| Board Meeting update | Bob Sturtevant, chair of the Governance Committee, shared an update about the survey. | February 23, 2021 |
| Board Member Recruitment | Governance committee to bring forth a diverse candidate pool for board membership. | February-June, 2021 |
| Governance Committee update | Survey results and the Cultural Competency and Diversity Plan shared with the committee. | April 14, 2021 |
| Board Retreat/Workshop | Workshop topic “Diversity and Inclusion” with guest speaker Eric Love, the University of | April 20, 2021 |



| | | |
|---------------|---|-----------------|
| | Notre Dame's Director of Staff Diversity and Inclusion. | |
| Board Liaison | Matt Harrington took identified candidates to the Board President – Ed Jordanich for approval and appointing | August 25, 2021 |
| Board Liaison | RJ Dabney was appointed as the Board Liaison for IDEA. Provide Board Liaison with a quarterly outline of initiatives, coordination, and outcomes, inviting the liaison to monthly meetings for engagement with members. | November 2021 |
| Board Liaison | Milt Lee will replace RJ Dabney | March 2022 |

| Review Period | Setting | Comment |
|---------------|--------------------------|---|
| Q2, CY2021 | Created/Officers Meeting | CEO and Officers – January 2021 CEO and Officers – Reviewed May 2021 |
| Q3, CY2021 | Officer Meeting | Officers – Reviewed August 2021 |
| Q4, CY2021 | Officer Meeting | CEO and Officers – Reviewed November 2021 |
| Q1, CY2022 | Officer Meeting | CEO and Officers – Reviewed January 2022 |
| Q2, CY2022 | Officer Meeting | CEO and Officers – Reviewed May 2022 |
| Q3, CY2022 | | |
| Q4, CY2022 | | |
| Q1, CY2023 | Officer Meeting | CEO and Officers – Review March 2023 |
| Q2, CY2023 | Officer Meeting | CEO and Officers – Review May 2023 |
| Q3, CY2023 | Officer Meeting | CEO and Officers – review August 2023 |
| Q4, CY2023 | | |

IV. UPDATES AND REVIEWS

I.D.E.A. Focus and Planning Group meetings:

| Date | Topics |
|-------------------|--|
| October 19, 2020 | Initial group meeting |
| December 18, 2020 | Logistics of employee survey |
| January 6, 2021 | Group leadership, organization; employee survey distribution |
| February 10, 2021 | Survey results reviewed; interpreting and using the data; CARF standards |
| February 23, 2021 | Review and prepare for Leadership Team presentation |
| March 5, 2021 | Recap Leadership Team presentation: planned upcoming Leadership Team presentations and talked about guest speakers |



| | |
|--------------------|--|
| April 16, 2021 | Recap 4/7/21 Leadership Team presentation: Microaggressions and talked about guest speakers. Planned upcoming May topic (continuation of microaggression) and new guest speaker for Leadership Team. |
| April 22, 2021 | Paylocity introduced new learning module – IDEA members assigned the module to determine potential role out to LOGAN staff in July-August 2021 |
| May 28, 2021 | Discussed Bianca Tirado coming off LOGAN Board – planned outreach to CEO for new Board representation to advocate for IDEA initiatives. |
| June 9, 2021 | Recap 6/2/21 Leadership Team presentation: Sexism and Genderism - talked about guest speaker. Planned upcoming July topic (Racism) and new guest speaker for Leadership Team. Assigned new IDEA members the Paylocity training module for feedback. |
| June 22, 2021 | Review logistics for 7/7/21 Leadership Team Meeting – Guest speaker and virtual presentation, Paylocity learning module feedback, update on Board outreach through IDEA appeal to CEO, revisit the need for consistent note taking and set day/time to meet with chairs present, address email from staff: Juneteenth as paid LOGAN holiday, review of updated Competency Plan. Discussed measurement methods for evaluating the effectiveness of the Competency Plan for relevant stakeholders, discuss will be continued. |
| August 11, 2021 | Discussed need for in-person presenters, identified two potential local presenters Bethany Hartley and Dexter Overall, confirmed October roll out for Paylocity Learning Module for staff, Proposed shorter meeting times with more frequency (meeting on 11 th and 25 th of each month for 30 minutes each), Defined roles and responsibilities of group members, Danica to reach out to CFO for total cost of adding additional holiday “Juneteenth” to figure out funding needs, Group made edits to the Plan – Angie to update and upload to file in Teams. Two Board liaisons identified – Milt Lee and RJ Dabney to replace Bianca Tirado for advocacy at the Board level. |
| August 25, 2021 | IDEA Reached out to CEO for recommendations for local speakers from his professional network, two potential speakers identified (Bethany Harley, CSO and Director of Diversity, Equity and Inclusion for the South Bend-Elkhart Regional Partnership and Dexter Overall, Director of Diversity, Equity, Belonging, and Student Life at Ivy Tech). Reached out to Doug Kroll, CFO to understand the process and cost for adding a paid holiday to the LOGAN paid holiday list, to include Juneteenth for 2022, Updated the first page content of the Cultural Competency and Diversity Plan as a group. |
| September 22, 2021 | Discussed a suggestion box for employees, which allows issues to be voiced and an IDEA member to guide the employee to the correct method of resolving the issue (Corporate Compliance Hotline or Human Resources). IDEA also discussed adding a page to the website to include resources for employees and clients. |
| October 2021 | IDEA marketing campaign utilizing posters at all locations, internal TV ads for staff and visitors, brochures in each main facility lobby, Paylocity employee self-service portal, LOGAN website, social media platforms. |
| November 10, 2021 | Launch net Paylocity Module to employees December 2021, RJ Dabney is new Board liaison, Kate Lawton is added to the team, market the corporate compliance number via monitors/Link newsletter/email, crate IDEA resources area on LOGAN’s website. |
| November 29, 2021 | Create LOGAN casting call for employees, developing brief scripted scenarios starring our employees touching on each of the 6 issues (ageism, racism, sexism, ableism, microaggression, genderism) |



| | |
|-------------------|--|
| December 8, 2021 | Review of scripts from members, Kate to put out casting call date to employees, members to meet after new year to discuss the coordination of the casting call date. |
| January 12, 2022 | Four interested employees via casting call – members to reach out to a few more, employee audition 1/25 at 1PM at LOGAN Center, RJ Dabney has moved back to his hometown and is off the Board. |
| January 26, 2022 | Members identified five additional employees for auditions, beginning work on cloning last year's employee survey (purpose to use same criteria and questions to compare/contrast year over year with several new questions added to measure IDEA's impact and satisfaction rating over the agency. |
| February 9, 2022 | Identified an alternative to filming employees based on challenges with participation and scheduling for the employee educational "pillar videos," filming is scheduled for 2/17, Kate to use monitors to market "call to action" to recruit more employees to the IDEA group. |
| February 23, 2022 | Reschedule filming date for 3/8 due to challenges with back update of 3/11, Savannah is drafting the employee announcement for the new employee survey, and she will provide it to the CEO for final approval prior to the survey launch date. The group will not meet in the month of March – all hands-on deck for the LOGAN Nose-On event. |
| April 13, 2022 | Rescheduled videography to 4/28 still dealing with complication. The survey is scheduled to launch in the first week in May. |
| April 27, 2022 | Savannah to set up the QR Code for the survey, Kate to put out the code on monitors for employees, Angie to post survey link in Paylocity after launch. Employee Survey will launch on May 2 nd . |
| May 5, 2022 | Survey flyers are going out to all locations today with link and QR code to reach those who may not see email or have a cell phone. The group discussed reaching more stakeholders and will prepare to provide the Board Members and LOGAN families with the survey information as well. The group discussed ways to increase visibility in the agency. |
| May 11, 2022 | <p>The survey currently has 129 responses, mostly women, white, and ages 35-45. This is in line with the current employee demographic. 18% of the 27% of African American demographic respond so far. We are sending weekly reminders to all employees via Paylocity to carry out the survey.</p> <ol style="list-style-type: none"> 1. Kate to check on the monitors with IT to see if they are functional for the QR code to be visible to employees not just in LC but all locations. Kate to also create a flyer with QR code and email it to the reactionists at each location to print and post it for employees to see. <ol style="list-style-type: none"> a. LC – Jenny Demske b. LI – Ann Georgia c. Granger – Courtney N. d. Michigan – Pam Shuster e. SACA, H&F, Darden, Boys and Girls Club – need to take the flyers in person <p>The group talked about ways to increase visibility of IDEA – create subgroups, one for each shift that meet via zoom (early AM, mid-day, and late evening). A rep from each shift to bring the information from the subgroup back to the larger group for actionable items to be discussed and accomplished.</p> |



| | |
|--------------|--|
| | <ol style="list-style-type: none"> 2. Angie to email leadership to provide the survey information and ask them to talk with their staff and pass the information on for them to take the survey. 3. Angie to email Christina Tembo to ask her to please send the survey to the friends and family list like she did last year, capturing this stakeholder. 4. Angie to talk to Becca about getting the survey information out to the Board members to capture this stakeholder as well. |
| May 25, 2022 | <p>The survey has 215 responses, compared to a total of 279 last year. We will extend the survey to EE's and continue to send reminders weekly for participation.</p> <ol style="list-style-type: none"> 1. Christina to send the survey to other stakeholders in June (keeping the survey open for 30 days). <ol style="list-style-type: none"> a. Clients working for LOGAN b. Families c. Board members for LOGAN, HRC, Protective Services, etc... 2. Kate to reach out to IT to ask when the monitors for the homes will be usable. The IDEA members want to reach as many residential employees for survey participation as possible. 3. Kate to include a slide in the upcoming LOGAN Link newsletter for IDEA group visibility and employee exposure to its purpose. 4. Danica to go to facility sites in the mornings, when possible to solicit employees to take the survey and/or help them on computers if needed. 5. Once the survey is closed at the end of June, break down the information into bite size pieces to distribute in increments to leadership and the employee population. The purpose will be to spark supervisor and employee conversations about the focused data being provided. 6. After the survey closure, further recruit members with a call to action. The purpose being to have more hands to help in initiatives and training agency staff. |
| June 8, 2022 | <p>The survey currently has 258 employees only response, compared to a total of 279 for all stakeholder responses during the February 2021 survey. We extended the survey to employees through 6/30 and will continue to send reminders weekly for participation.</p> <ol style="list-style-type: none"> 1. Christina to send the survey to other stakeholders today (6/8) – (keeping the survey open for 30 days). <ol style="list-style-type: none"> a. Clients working for LOGAN b. Families c. Board members for LOGAN, HRC, Protective Services, etc... 2. Danica to go to H&F tomorrow morning (6/9) to promote the survey, soliciting employees to take survey and/or help them on computers if needed. |



| | |
|---------------|---|
| | <p>3. The June 22nd meeting is cancelled, and the next meeting will be on June 13th at 9AM via Teams.</p> |
| July 13, 2022 | <p>Discussed survey totals. 360 responses, holding at 360 since last week.</p> <ol style="list-style-type: none"> Closed survey <p>Danica and Savannah meeting on 7/21 to compile and analyze survey results</p> <ol style="list-style-type: none"> Will organize results into a consumable format Comparison between 2021 survey and Paylocity Demographics <p>Discussed scheduling a time to meet with everyone (and Matt) in person to discuss results and game plan for 2022-2023 fiscal year.</p> <ol style="list-style-type: none"> Next IDEA meeting 7/27 at 9am <ol style="list-style-type: none"> Possibly meeting 8/8:30-9:30 in person to discuss? Will email team to determine in person meeting date. |
| July 27, 2022 | <p>CHRO removed the survey verbiage from Paylocity as the survey was officially closed last week. CHRO sent the employee demographics via Paylocity's Data Insights module to CMO for compiling the numbers/percentages from May 2022 – July 2022 (dates corresponding to the survey begin and end dates).</p> <p>The demographics include:</p> <ol style="list-style-type: none"> Gender Age (Generation) Race Veteran Status Disability <p>The survey results show that it reached more people this year with an increased number from family member respondents. However, the percentages of impact year of year on the topics was small. The IDEA team members meet with the CEO 7/28/22 to review the survey results and comments and strategize on the findings /data roll out to the agency.</p> |
| July 28, 2022 | <p>CHRO to coordinate with SMB Leadership – Year 2 of LOGAN Leadership Academy – Make one of the quarterly training topics DE&I to tie in IDEA planning and focus group efforts with leadership/supervisors. IDEA members come to speak during the LLA meeting and provide informational handouts.</p> <ol style="list-style-type: none"> Confirmation – Share employee survey data (stats) with all employees at LOGAN – Christina Tembo to create QR Code for monitors and text w/survey results link to all employees. IDEA co-chairs to identify themes in the survey comments. IDEA co-chairs to create presentation for LOGAN Leadership's monthly meeting of Directors and Officers – Sharing the comment themes and one comment specific comment form each theme – Generating organic group conversation. IDEA co-chairs to prepare goals for next year and share with LOGAN Leadership via the presentation as well. |



| | |
|--------------------|--|
| | <p>5. Remind leadership LOGAN has Matt's suggestion box (not anonymous) and the Compliance Hotline (anonymous)</p> <p>6. CHRO to update the employee survey information in the Plan Document – Stakeholders section and all meeting notes in the IDEA section to share with the LOGAN Board.</p> |
| October 21, 2022 | IDEA Focus and Planning Group meeting included two new members, Maricella Chavez and Jill Dailey. |
| November 1, 2022 | Email to all staff to recruit new members, resulting in three additional members. |
| November 2, 2022 | Members of the IDEA Focus and Planning group presented the 2022 survey results to the Leadership Team. |
| December 12, 2022 | Met with potential members sharing concerns, giving feedback. Danica gave stats on the 2022 survey. Group talked about next steps and planned the next meeting. |
| January 19, 2023 | The group feels like people do not know what IDEA is and wants to rebrand. Maybe include the word “advocates” to the name. The group decided to put the results of the survey in the LOGAN Link. The results need to be paired down and simple in a pie graph. The group added a comment section to each question instead of just one comment section at the bottom. |
| February 16, 2023 | Maricella will add the date of time of each meeting to the LINK. The survey information is not getting much traction on the LINK. The group would like to change the name to “Inclusion Advocates” and the tag line would be “including you!” The group would like to order new compliance posters and Angela is helping with this. The meetings will move to different locations to accommodate as many schedules as possible. |
| March 16, 2023 | Still talking about rebranding but have not finalized any name. Discussed putting together steps for supervisors to follow based on particular situations. A flow chart that shows what to do when..... |
| April 20, 2023 | <p>Discussed how to get people to join the group. Would it help to get some snacks? Bring some goodies? Call it Donuts and Discussion</p> <p>Discussed the Compliance Posters. When handing out posters, talk about it to the staff And invite them to the next meeting</p> <p>Discussed Mental Health training/group</p> |
| May 18, 2023 | <p>Discussed Ageism</p> <p>How younger employees might be being taken advantage of by older employees who push things onto younger employees.</p> <p>Or people who have been in the organization get things pushed to because they have been here longer and know how to do it.</p> <p>We discussed how do we make an impact on our organization.</p> <p>We talk about the different generations</p> <ul style="list-style-type: none"> • Comic strips or movie (person standing over with word bubbles and saying) – “Does this scene look familiar to you?” |
| September 28, 2023 | Discussed the video created by Christina that explains I.D.E.A. Gave ideas for additions to the video as well as how to get the video out to employees – Payloctiy, the monitors and text message. Also discussed the diversity |



| | |
|------------------|---|
| | conference Angela is attending next week and how she will relate what she learns to the group. |
| December 6, 2023 | Megan, Angie and Adria attended a grant seminar hosted by Early Learning Indiana Purdue NW. The focus was on serving black families and children. According to Megan, most families served by LOGAN have been white/Caucasian, Cheryl said this was true in the world of adult services too. Megan, Angie and adria encourage LOGAN to consider joining the National Black Child Development Institute (NBCDI). |

The plan will be updated and reviewed as follows:

- I.D.E.A. Focus and Planning Group Meetings
- Officer's Meetings (quarterly)
- Board of Directors Governance Committee Meetings (five per year)

| Action | Setting | Date |
|----------|------------------------------|------------------|
| Created | CEO and Officers | January 2021 |
| Updated | CEO | March 30, 2021 |
| Reviewed | Governance Committee | April 14, 2021 |
| Reviewed | CEO and Officers | May 27, 2021 |
| Reviewed | Officers | August 12, 2021 |
| Reviewed | CEO and Officers | November 3, 2021 |
| Reviewed | Officers Meeting | January 5, 2022 |
| Reviewed | Officers Meeting | May 4, 2022 |
| | | |
| Reviewed | Governance Committee Meeting | October 13, 2022 |

Addendum Survey Comparison 2021, 2022 & 2023

| Respondents | 2021 Survey | 2022 Survey | 2023 Survey |
|----------------|-------------|-------------|-------------|
| Total | 209 | 360 | 71 |
| # of Employees | 161 | 291 | 69 |



| | | | |
|---|-----|-----|----|
| # of Clients | 11 | 7 | 1 |
| # of Family Members | 29 | 43 | 1 |
| # of Board/Community Members | 8 | 17 | 0 |
| Black/African American | 52 | 74 | 4 |
| American Indian or Alaskan Native | 1 | 2 | 0 |
| Asian | 2 | 2 | 2 |
| Hispanic/Latino | 10 | 7 | 6 |
| Native Hawaiian or Other Pacific Islander | 0 | 0 | 0 |
| White | 198 | 240 | 53 |
| Preferred Not To Say | 18 | 25 | 5 |
| Other | 1 | 10 | 1 |

| Racism | 2021 Survey | 2022 Survey | 2023 Survey |
|--|--------------------|--------------------|--------------------|
| frequently experience racism | 3% | 1% | 1.4% |
| sometimes/occasionally experience racism | 12% | 14% | 14.1% |
| rarely experience racism | 12% | 12% | 16.9% |
| never experience racism | 68% | 66% | 60.6% |
| don't know/prefer not to say | 5% | 7% | 7% |

| Sexism | 2021 Survey | 2022 Survey | 2023 Survey |
|--|--------------------|--------------------|--------------------|
| frequently experience sexism | 1% | 0% | 1.4% |
| sometimes/occasionally experience sexism | 11% | 10% | 15.5% |
| rarely experience sexism | 19% | 11% | 21.1% |



| | | | |
|------------------------------|-----|-----|-------|
| never experience sexism | 67% | 70% | 56.3% |
| don't know/prefer not to say | 3% | 9% | 5.6% |

| Genderism | 2021 Survey | 2022 Survey | 2023 Survey |
|---|--------------------|--------------------|--------------------|
| frequently experience genderism | 2% | 1% | 4.3% |
| sometimes/occasionally experience genderism | 8% | 8% | 11.4% |
| rarely experience genderism | 9% | 12% | 12.9% |
| never experience genderism | 76% | 69% | 64.3% |
| don't know/prefer not to say | 5% | 10% | 7.1% |

| Ageism | 2021 Survey | 2022 Survey | 2023 Survey |
|--|--------------------|--------------------|--------------------|
| frequently experience ageism | 3% | 1% | 2.9% |
| sometimes/occasionally experience ageism | 12% | 13% | 17.2% |
| rarely experience ageism | 14% | 11% | 14.3% |
| never experience ageism | 68% | 65% | 62.9% |
| don't know/prefer not to say | 3% | 10% | 2.9% |

| Ableism | 2021 Survey | 2022 Survey | 2023 Survey |
|---|--------------------|--------------------|--------------------|
| frequently experience ableism | 3% | 1% | 0% |
| sometimes/occasionally experience ableism | 8% | 6% | 7.2% |
| rarely experience ableism | 6% | 9% | 8.7% |



| | | | |
|------------------------------|-----|-----|-------|
| never experience ableism | 73% | 71% | 76.8% |
| don't know/prefer not to say | 10% | 13% | 7.2% |

| Microaggression | 2021 Survey | 2022 Survey | 2023 Survey |
|---|--------------------|--------------------|--------------------|
| frequently experience microaggression | 6% | 4% | 5.7% |
| sometimes/occasionally experience microaggression | 19% | 8% | 31.4% |
| rarely experience microaggression | 10% | 16% | 14.3% |
| never experience microaggression | 59% | 51% | 45.7% |
| don't know/prefer not to say | 7% | 11% | 2.9% |

Pathfinder Services Cultural Competency and Diversity Plan for FY 2023-2024

This plan was prepared by the Pathfinder DEI Committee under the direction of Ashley Bostic, Chief Community Impact Officer. The document was presented and approved by the Pathfinder Services Executive Leadership Team on 4/14/2023.

Organizational Values

| Goal | Indicators | Activities | Timeline | Status | Person Responsible |
|--|---|---|--------------------------------------|--------|---|
| Become a more culturally competent organization through staff development. | Presence of overall investment in Cultural Competency inclusive of Culture, Age, Veteran Status, Gender, Sexual Orientation, Spiritual beliefs, Socioeconomic status, and Language. | All Pathfinder staff complete documented Cultural Competence and Diversity Training. | At New Hire Orientation and Annually | | Pathfinder Services Leadership Team |
| | | Creation of PFS DEI Committee | Completed | | Ashley Bostic |
| | | Provide regular communication about Cultural Competency and Diversity news, resources, expectations, and events on the PFS Internal SharePoint Page and external Website. | Ongoing | | Pathfinder Services Leadership Team and DEI Committee Members |
| | | Review of the Cultural Competency Plan | Annually | | Ashley Bostic and DEI Committee Members |
| | | Regular Cultural Competency discussions, presentations, reports and activities at PFS Board, Executive, Senior, and Extended Leadership Meetings | Ongoing | | Pathfinder Services Leadership Team and DEI Committee Members |
| | Presence of Cultural Competency Principles | Identify a Cultural Competence Executive | Completed | | Ashley Bostic |