



# Moving Diversity + Inclusion from Theory to Action

Diversity + Inclusion Task Force  
January 2018



Dear Colleague,

Research shows that companies with greater demographic diversity financially outperform their peers and an inclusive business environment boosts innovation and employee engagement.

Yet despite some exemplary efforts, the accounting profession has reported only small increases in the number of diverse graduates entering the profession over the past 7 years. Certified Public Accountants and businesses are committed to changing this trend. We know that commitment must begin with partnerships at the highest levels of the profession, and as a result, OSCPA is making diversity + inclusion a top strategic priority.

Our goal, working with D+I partners and employers, is to create a more diverse and welcoming CPA profession and be a leading convener of conversations that advance effective D+I initiatives. We want to ensure all individuals are welcomed, valued and embraced as contributing staff, members, volunteer leaders and business partners who are elevating the profession's appeal, value and future.

In 2016, The OSCPA Executive Board approved an approach to engage leading minds in the profession to develop a comprehensive diversity and inclusion strategy. A task force worked with a D+I expert to guide this process.

Together, the group explored the state of diversity and inclusion in Ohio's CPA profession and developed a multi-year framework that extends OSCPA's D+I practices, workforce recruitment initiatives and supports employers in developing and sharing their own solutions. Additionally, OSCPA benchmarked our strengths and gaps in our D+I policies, practices and philosophies compared to peer organizations.

With more than 20 years of successful, diversity student outreach experience, OSCPA is now ready to take our D+I commitment to the next level. That will require time and a larger, sustained effort.

We are still in the early stages of this journey and we look forward to partnering with CPAs and companies across Ohio as we take these important next steps.

Sincerely,

Sandra B. Richtermeyer, Ph.D., CPA  
Chair, Executive Board

Scott D. Wiley, CAE  
President & CEO

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# BACKGROUND

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[The Ohio Society of CPAs](#) (OSCPA) is a leading partner and influential voice for a thriving business environment. We are a community of 25,000 members representing 85,000 CPAs and accounting professionals statewide, leading important initiatives that protect the public and create a healthy and sustainable business climate in Ohio. Membership is comprised of CPAs and other financial experts working in a wide range of Ohio businesses and industries, CPA firms, government and education.

Diversity and inclusion (D+I) has long been recognized as the “right thing to do,” but has not always been viewed as a business imperative beyond the war for talent that all Ohio businesses face. Successful businesses understand that in a society where demographics are rapidly shifting, they need to be more relevant and sensitive to the needs of the employees and customers they serve today and hope to serve in the future. That mindset shift is bringing greater awareness for the benefits of building a business culture that is more diverse and welcoming at every level.

In November 2016, the Executive Board of The Ohio Society of CPAs approved plans to frame an organizational D+I strategy that would extend OSCPAs own diversity acumen and provide support to member organizations with the same goal. This is not the first time the organization has demonstrated a commitment to D+I, but it is the largest initiative to date in scope and scale. For guidance, OSCPAs engaged ASAE, and formed a Diversity + Inclusion Task Force comprised of board, staff and volunteer leaders from the CPA profession.

ASAE and D+I Task Force members were selected based on the need to bring a broad range of perspectives, professional experiences, plus organizational cultures and D+I expertise together to address this critical topic.

Before convening the task force, OSCPAs engaged an independent audit of its current diversity + inclusion practices. Using a credible business Inclusion Index Tool, a model in the association community, OSCPAs evaluated progress made and identified gaps in important D+I competencies which set the stage for opportunities identified by the task force and on behalf of the CPA profession.

The task force met several times throughout 2017 to identify challenges in the profession related to diversity + inclusion, frame goals and identify strategic possibilities for advancing D+I within the Ohio Society’s culture and in Ohio’s CPA profession. The group then synthesized dozens of ideas that frame OSCPAs first diversity + inclusion commitment statement and multi-year strategic plan.

# DIVERSITY + INCLUSION COMMITMENT

## THE BIG PICTURE

Akin to a theory of change, The Ohio Society of CPAs Diversity + Inclusion Commitment articulates key assumptions, audiences, strategic goals and expected outcomes through 2021. For specifics, see the graphic below which outlines key priorities of the plan for the first phase of this ongoing journey.

Over the next three years, The Ohio Society will dedicate leadership, time and resources to realizing this commitment. Along the way, we hope to be a diversity + inclusion influencer and resource to other Ohio businesses, especially those that value diversity + inclusion, but are not yet engaged in specific, actionable strategic endeavors.

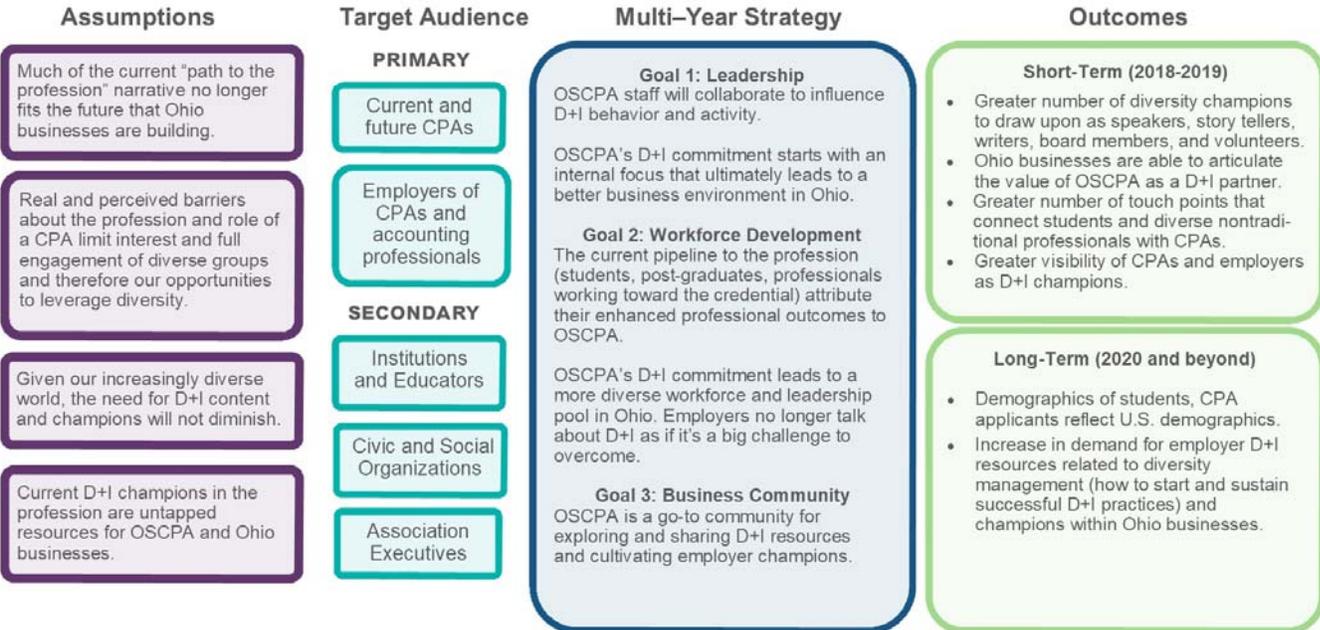
We also will measure progress as we move toward intended outcomes, remaining open-minded and flexible as we build relationships and work with members and others to move this strategy from vision to reality.

*Long-term success for The Ohio Society of CPAs and Ohio businesses rests on our ability to connect with and deliver value to current and future leaders in the CPA profession.*



## Diversity + Inclusion Commitment

**Core Belief** Long-term success for us and Ohio businesses rests on the ability to connect with and deliver value to current and future leaders in the CPA profession.



# DIVERSITY + INCLUSION COMMITMENT

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## DIVERSITY + INCLUSION STATEMENT

To advance the state of business in Ohio, The Ohio Society of CPAs models inclusion and embraces the diverse backgrounds and perspectives of those with whom we work and exist to serve.

While a breadth of backgrounds and perspectives is important, we are especially concerned with accounting professionals, current and future CPAs, and their Ohio employers. Much of the current “path to the profession” narrative no longer fits the future that Ohio businesses are building, so we will create space for important conversations to flourish and grow.

We will provide diversity and inclusion leadership where it is needed in The Ohio Society’s governance, membership, operations, and programs, resulting in the delivery of culturally effective service and value to all members and stakeholders who look to us for leadership and support.

## TERMINOLOGY

How we define and talk about diversity + inclusion is every bit as important as what initiatives we undertake to meet our objectives. In alignment with effective D+I practices, OSCPA intentionally distinguishes between “diversity” and “inclusion” rather than using the terms interchangeably. Our terminology includes:

### Diversity

Diversity refers to the composition of a group of people from any number of demographic backgrounds, identities (innate and selected), and the collective strength of their experiences, beliefs, values, skills, and perspectives.

### Inclusion

Inclusion is the act of establishing philosophies, policies, practices, and procedures to ensure Ohio businesses and individuals contributing to the organization’s success have a level playing field to compete, and equal access to opportunities, information, and resources that help them share in driving the organization’s growth and value.

# STRATEGIC PLAN

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The Ohio Society of CPAs' first D+I Strategic Plan outlines key priorities over the next three years and helps to shift our role as a D+I champion to a proactive D+I catalyst in Ohio. Here is our focus:

1. **Leadership:** Staff will collaborate to influence D+I behavior and activity

OSCPA's D+I commitment starts with an internal focus that ultimately leads to a better business environment in Ohio. To effectively elevate the success of our members, we must elevate the success of staff who serve them.

Rolling out a single D+I training or program does not adequately reflect our commitment. By 2021, we envision having in place thoughtful D+I policies, programs and practices that empower and support staff in their day-to-day work and elevate the association's position as a recognized employer of choice.

**Key metrics:**

- Conduct employee workplace climate study with goal of 100% participation
- Establish benchmark for employee attitudes about OSCPAs culture and closing gap areas as reported in ASAE's Association Inclusion Index
- Implement 1-2 internal D+I initiatives targeted at improving future climate study results

2. **Workforce Development:** The current pipeline to the profession (e.g. students, post-graduates, professionals working toward the credential) attribute their enhanced professional outcomes to OSCPAs.

OSCPAs D+I commitment leads to a more diverse workforce and leadership pool in Ohio. Thus, employers no longer talk about D+I as if it's a big challenge to overcome.

**Key metrics:**

- Student market:
  - Expand student diversity outreach programs
  - Increase participation in diversity outreach programs by underrepresented students
  - Identify real versus perceived new graduate skills gaps as measured by 2017 OSCPAs workforce skills gap research project
  - Develop a multi-year plan with progress metrics to address workforce skills gaps.
- Post-graduate and non/soon-to-be-credentialed professionals market:
  - Increase awareness among target audience for CPA career paths
  - Increase engagement of nontraditional professionals in our programs

# STRATEGIC PLAN

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3. **Business Community:** OSCPA is a go-to community for exploring and sharing D+I resources and cultivating employer champions.

We recognize we are early proponents in these conversations, so we will explore what strategies exist in the D+I space and CPA profession, and work to build community and identify unique, needed resources for employers. OSCPA's D+I commitment raises the visibility of CPAs and their employers. Our goal is to be a convener of D+I champions and identify and/or develop resources that members could leverage in their organizations' efforts.

**Key metrics:**

- Identify 3-5 primary D+I needs in the profession
- Identify 3- 5 leading practices that advance inclusiveness in Ohio businesses
- Increase representation of individuals from diverse backgrounds in OSCPA communications and content.
- Cultivate 3-5 D+I champions from each target segment that map to career paths within the accounting profession (public accounting, corporate industry, finance, manufacturing, consulting, for example)

At the closing of the D+I retreat, the task force shared their collective vision of what a successful strategy should accomplish and what that success might look like in practice.

All agreed that this would need to be an ongoing effort that would require commitment, communication and shared responsibility from members across the profession.

## What should success look like?

"The programs of the Ohio Society are moving the needle on the perception of the profession and resulting in greater involvement in OSCPA activities, especially programs dedicated to true diversity needs."

"The strategy will be targeted and focused on building the business community in Ohio."

"OSCPA and the CPA profession in Ohio are more relevant, and provide focus and resources for changing mindsets and cultures."

"CPAs are role models for achieving positive direction and results in diversity + inclusion."

"The Ohio Society of CPAs has done an enviable and unique job of defining success in D+I efforts and involved members in making it actionable."

# THREE-YEAR TIMELINE

	2018-2019	2019-2020	2020-2021
<b>Leadership</b>			
<p>OSCPA staff will collaborate to influence D+I behavior and activity.</p> <p>OSCPAs D+I commitment starts with an internal focus that ultimately leads to a better business environment in Ohio.</p>	<p>Introduce new D+I policies and procedures to close gaps reported in ASAE's Association Inclusion Index</p> <p>Design and launch first Workplace Climate Study</p>	<p>Identify staff team to define an internal D+I strategy and identify initiatives that will make OSCPAs a D+I model</p> <p>Communicate strategy and plans to OSCPAs Executive Board and staff</p>	<p>Begin to roll-out OSCPAs internal D+I strategy (1-2 initiatives)</p>
<b>Workforce Development</b>			
<p>The current pipeline to the profession (e.g. students, post-graduates, professionals working toward the credential) attribute their enhanced professional outcomes to OSCPAs.</p> <p>OSCPAs D+I commitment leads to a more diverse workforce and leadership pool in Ohio. Thus, employers no longer talk about D+I as if it's a big challenge to overcome.</p>	<p><u>Student market:</u> Expand student diversity summer camp to one additional market</p> <p>Design and launch a communications strategy to promote accounting career paths and junctures to diverse groups of students</p> <p>Identify real versus perceived new graduate skills gaps and rank them for their importance to employers today and in next 5 years</p>	<p><u>Student market:</u> Expand student diversity programs from 2 to 3 markets in Ohio</p> <p>Develop a multi-year plan to address the workforce skills gap and support employers in growing a more diverse CPA profession in Ohio</p>	<p><u>Student market:</u> Launch one program to address the graduate skills gap</p>

# THREE-YEAR TIMELINE

	<p><u>Post Grad market:</u> N/A</p>	<p><u>Post Grad market:</u> Explore and develop career pathing models and junctures for diverse groups of post-grad professionals</p>	<p><u>Post Grad market:</u> Develop a comprehensive communications strategy for D+I to promote accounting as an alternative career to diverse groups of post-grad, nontraditional professionals</p>
<b>Business Community Connections</b>			
<p>OSCPA is a go-to community for exploring and sharing D+I resources and cultivating employer champions. We are early proponents in this, so we will explore what strategies exist in the D+I space and CPA profession, and work to build community in meaningful ways.</p> <p>OSCPA's D+I commitment raises the visibility of CPAs and their employers. Our goal over the next three years is to be a connector to D+I champions and resources that members are leveraging in their own firms.</p>	<p>Identify D+I needs and key practices that drive inclusiveness in Ohio</p> <p>Develop a comprehensive communications and content strategy for D+I</p> <p>Work with volunteer group to identify current resources as well as needed resources to support employer D+I efforts</p>	<p>Cultivate a talent pool of D+I champions from within the membership</p> <p>Identify a dedicated resource to drive D+I initiatives at OSCPAs forward and ensure accountability for identified objectives and progress measures</p>	<p>Leverage champions to build community and share or develop D+I resources with members</p> <p>Revisit D+I needs and key practices and articulate a path forward for next 1-3 years</p>

# DIVERSITY + INCLUSION TASK FORCE

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The Ohio Society of CPAs would like to thank the members of the task force for their time, commitment and expertise in building this plan.

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# DIVERSITY + INCLUSION TASK FORCE

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## What did the strategic framework accomplish?

“This process brought many inclusive thoughts and ideas to the surface that will impact the profession and the CPA talent pipeline going forward.”

“It moved diversity + Inclusion from talking, to action and execution.”

“We have a good starting point to promote what makes our profession unique and also what barriers we face to dispel the myths and misconceptions about being a CPA.”



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