

ADVANCING



IN ORGANIZATIONS

An Equity Fluent Leadership Playbook

The Center for Equity, Gender & Leadership at the Haas School of Business (University of California, Berkeley) is dedicated to educating Equity Fluent Leaders to ignite and accelerate change. Equity Fluent Leaders intentionally use their power to drive positive change and build an inclusive and equitable world. Equity Fluent Leadership (EFL) is an ongoing journey. Our suite of EFL Playbooks delivers strategies and tools for business leaders to advance diversity, equity, and inclusion (DEI). The Playbooks serve as a bridge between academia and industry, highlighting and translating research into practitioner-oriented strategies.

This Playbook was authored by Genevieve Smith, Jasmine Sanders, and Ishita Rustagi with valuable feedback from Kellie McElhaney. It was also informed by a working group with Anaplan including Rupert Bader, Sherika Ekpo, Beauram Hur, and Aimee Light. Playbook design by Georgina Brown. Cover and illustration design by Erica Baptiste. The Playbook and resources benefited from interviews, feedback, prototyping, and review by various practitioners and leaders in the industry (see Appendix 1 for the full acknowledgments). We respectfully acknowledge that this work has been developed at the UC Berkeley campus, which sits on unceded Ohlone land.

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Belonging in organizations is a deeply personal sense where an employee feels meaningfully connected to and a part of their organization.

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### WHAT IS THIS PLAYBOOK?

This Playbook outlines what belonging in the workplace looks like, strategies for organizational leaders to enhance belonging, and how to measure it. It also explores technological tools that can measure and enhance belonging.

### FOR WHOM IS THIS PLAYBOOK?

You are a current—or future—CEO, Chief Diversity Officer (CDO), People or HR Leader, board member, department head, manager... No matter where you fall in your organizational chart, you see yourself as a leader and team member who is eager to help employees and colleagues thrive and grow. This Playbook is geared towards organizations and their leaders within primarily knowledge worker industries (e.g., finance, tech, professional services, academia, etc.). However, the concepts can be applied in various work settings.

### WHY USE THIS PLAYBOOK?

Belonging is a core human need. Belonging in the workplace matters, as people spend the majority of their waking lives at work. Organizations that are able to help employees feel they belong will be more productive and innovative and better equipped to retain and grow their talent.

By using this Playbook, you can be seen as a creative thought leader at your organization, build more meaningful connections with your colleagues, and shape your own work environment to be more equitable and inclusive.

### HOW TO USE THIS PLAYBOOK?

This Playbook starts with a Snapshot that serves as an executive summary with top-line information and an overview of the 16 strategic plays to enhance belonging. The Playbook then gets to the Deeper Dive, which provides more information on the impacts of belonging, a detailed checklist with specific implementation actions for the plays, and challenges to be aware of.

There are three tools to support the playbook: (1) a Rapid diagnostic tool for managers & leaders to identify plays to prioritize; (2) a Rapid diagnostic tool for HR & DEI leads to identify plays to prioritize; and (3) a Belonging measurement tool for HR leaders to assess aggregate levels of belonging among employees and track impacts over time from implementing the plays. They can be found separately on our [Playbook site](#).

### HOW WAS THIS PLAYBOOK DEVELOPED?

The Playbook was developed through leading expert and practitioner interviews, focus group discussions, and a review of literature across various disciplines such as sociology, psychology, organizational management, and more. It draws from our team's systematic literature review on belonging. The technology assessment included a collection and analysis of tools with a focus on artificial intelligence that are being developed and used to measure and enhance belonging. The playbook was prototyped and iterated with businesses and business leaders.

# FOREWORD

## Anaplan

At Anaplan, we believe belonging is the central connection point at work that allows people, teams and companies to thrive. Our business is built on the power of connection, so we know first-hand the incredible business outcomes made possible when people feel a sense of belonging and can contribute at their highest level. We partnered with EGAL to create this playbook to provide more evidence-based, real-world strategies and applications that foster and measure belonging in tangible ways—for ourselves and any other equity-fluent company or leader passionate about the business outcomes belonging delivers. We are excited to share this playbook with the world because we believe enhancing belonging helps all companies—and people—succeed.



**SHERIKA EKPO**  
Chief Diversity and Inclusion Officer



There has never been a more important time for companies to intentionally develop a culture of belonging. This generation of business students cares deeply about feeling seen, heard and valued by their leaders, teams and organizations. EGAL's work on belonging is critical to supporting leaders and businesses to foster workplaces where everyone feels they belong.

**ANN E. HARRISON**  
Bank of America Dean at University of California,  
Berkeley, Haas School of Business



*“I felt alone, unseen. I was going through the motions, moving from one task to the next, mostly looking forward to my lunch break and another episode of “Friends” to watch after work. Sometimes I experienced bad bouts of anxiety nearing panic attacks. No one at work knew what I was going through. My work suffered, but I couldn’t get myself to care all that much. My manager wasn’t checking in very often, and I felt little connection to my organization’s mission. I liked my teammates well enough, but we didn’t connect much outside of our weekly meetings. I eventually realized something needed to change. So, I decided to leave.”*

This story is all too common these days; workers feeling a lack of connection, support, and a sense of purpose are leaving in droves as part of the great resignation. They indicate that they are craving compassion, meaning, and just more. Even if not leaving, workers may be languishing in place, afraid to leave, unhappy with work relationships, and uncertain how to make the most of their time working. An underlying thread and theme comes back to the concept of belonging.

Belonging is more than simply something people want, it’s a human need like water, food, and shelter. Humans are hardwired to need to belong, whether to their families, communities, or places of work. We need meaningful, positive relationships and emotional connections. This need is deeply embedded in all of us,

stemming from human evolution. In the past, survival literally depended on building connections with other people and groups to overcome threats and stresses.

We also spend about one-third of our lives working.<sup>1</sup> A sense of belonging in the workplace is important not only for individuals to feel fulfilled at work but also for organizations to meet productivity goals and drive innovation. Simply put, belonging is not a nice-to-have, it’s a must.

Writing this in 2022, we are grappling with how to rebuild and understand professional relationships and connections as we continue to reel from the realities of living in a global pandemic that has upended work as many of us knew it, including temporary or permanent transitions to remote or hybrid work. The pandemic will not be the only economic, public health, or environmental shock to challenge and redefine the world of work in the 21st century.

This Playbook is meant to help leaders navigate what belonging means in the workplace and offer evidence-based strategies to enhance it—including doing so in a hybrid or remote world. The deeper dive also explores how to measure and enhance belonging, along with new technologies that can help but must be implemented with care and caution.

The good news is that many organizations are recognizing the importance of belonging and have started to implement or modify processes and practices that are already in place. Some simple steps can be taken immediately and build on existing tools, whereas more complex and differentiated efforts may need a multi-year investment. As belonging is such a universal need, the energy, capability, and willingness to engage in this effort are already latent. It requires leadership direction and focus to flourish.

# SNAPSHOT

This is an executive summary. Start here to see our top-line research findings around belonging in organizations and an overview of 16 evidence-based strategies to enhance belonging. For more information and tools to help implement the strategies, see our [Deeper Dive](#).

Psychologists have long established that belonging is a fundamental human need, not just something that is nice to have or desired.<sup>2</sup> People require meaningful, positive relationships with others and emotional connection to and with social groups.<sup>3</sup> Belonging in the workplace goes beyond simply feeling included, to feeling engaged, inspired, and that people at work care about you and your aspirations.

Belonging is a deeply personal sense where an employee feels meaningfully connected to and a part of their organization. There are five key elements of belonging:

- They are seen, heard, and valued as an individual in one's organization.
- Their contributions are valued and respected by the organization.
- They have a sense of connectedness with colleagues.
- They have the organizational knowledge to succeed.
- They are aligned with the organization's purpose and mission.

Belonging holds significant business value.

Organizations that prioritize belonging in the workplace can benefit from the following:

- **increased productivity and overall job performance<sup>4</sup>** through increased communication and knowledge sharing among employees<sup>5</sup>
- **greater innovation** as employees feel encouraged to take risks and even fail in workplaces with a strong sense of belonging, which results in heightened creativity<sup>6</sup>
- **improved talent attraction and talent retention** as employees who feel a strong sense of belonging are more likely to recommend their organization to others,<sup>7</sup> and are more satisfied, which decreases turnover risk for the organization<sup>8</sup>

A study by BetterUp revealed that high employee belonging resulted in a...



**56%**

increase in job performance



**50%**

decrease in turnover risk



**75%**

reduction in sick days



For a 10,000-person company, this would result in annual savings of more than

**\$52 million<sup>9</sup>**

In the midst of the great resignation, whereby workers are leaving in record-breaking numbers, belonging is, or should be, top of mind for every business leader across every industry.<sup>10</sup> Spikes in resignation driven by toxic culture, burnout, and diminishing feelings of connection highlight the critical need to center belonging.

### WHAT DOES IT TAKE TO FOSTER BELONGING?

Creating an environment of belonging is the responsibility of organizations and their leaders. It starts with five **drivers**:

1. establishing inclusive work environments,
2. creating connectivity opportunities,
3. having and living by organizational values and principles,
4. solidifying acknowledgment and accountability structures, and
5. maintaining work-life boundaries.

These five drivers lead to an environment where employees feel affirmation, pride, empathy, and trust. In turn, that helps create a psychologically safe culture and opportunities for vulnerability. Finally, we arrive at the **elements** of belonging and ensuring **organizational benefits**. It's important to acknowledge that belonging is not a static end destination and that leaders need to continually work to uphold cultures of belonging.

### WHAT ARE THE STRATEGIC PLAYS TO ENHANCE BELONGING?

This Playbook outlines 16 strategic plays for leaders to enhance belonging. They are critical to establishing the drivers listed above. See the Deeper Dive for more information on each play. We have several tools to help you. First, use our rapid diagnostic tools (one for leaders/managers, one for HR/DEI leads) to identify gaps and prioritize plays for action. Second, explore our measurement tool to track progress on belonging in your organization and continually monitor progress. All tools are available on our [Playbook site](#).



#### Inclusive Work Environments

1. Hold meetings where all participants feel supported, can actively participate, and are heard.
2. Create inclusive physical and virtual spaces.
3. Prioritize inclusive and precise language.



#### Connectivity Opportunities

4. Create formal and informal opportunities for employees to connect.
5. Establish mentorship opportunities & Employee Resource Groups (ERGs).



#### Organizational Values & Principles

6. Refine the organization's mission and vision and then clearly connect these to jobs.
7. Create standards of citizenship with links to organizational values.



#### Acknowledgment & Accountability Structures

8. Give recognition and reward people for their work contributions.
9. Update job descriptions and provide key information in hiring.
10. Ensure transparency in career development opportunities.
11. Ensure performance review processes are equitable and add metrics around efforts to enhance belonging.





### Work-Life Boundaries

12. Provide and enable employees to take advantage of caretaking support and flexible work opportunities.
13. Ensure employees are able to maintain healthy boundaries between work and personal life.



### Lastly, put Equity Fluent Leadership into practice. Leaders can

14. model vulnerability,
15. receive feedback, practice active listening, and respond with action, and
16. build your own equity fluency and inclusive leadership skills.

Building on your existing strengths and closing the gaps to advance belonging takes time. To be successful, organizational leaders will need to embrace the long-term value of belonging. Leaders will also need to highlight the goals and experiences that all employees have in common while celebrating diversity in the organization. Actions identified in this playbook ensure that leaders, managers, and employees will have opportunities to bring individuals closer together and find common ground every day. By committing to this change over time, everyone in the organization benefits from and can participate in a more cohesive, connected, and supportive way of working.

### WHAT IS THE DIFFERENCE BETWEEN INCLUSION AND BELONGING?

Put simply, inclusion is being invited to the party. Helping invitees feel like they belong involves creating an environment where everyone feels welcomed, can meaningfully engage, and enjoy themselves. Inclusion is being invited to and present at the party. Belonging is actually enjoying yourself. It's important to foster inclusion in the workplace, but not enough. Belonging is about quality and meaningful connection.

Our plays focus on getting to that extra level of belonging. That said, it assumes a baseline of inclusion and safety. For example, it assumes a workplace that proactively mitigates harassment with clear reporting mechanisms and repercussions for perpetrators.

# THE DEEPER DIVE

Belonging in the workplace goes beyond simply feeling included. **Belonging is a deeply personal sense where an employee feels meaningfully connected to and a part of their organization.** There are five key elements of belonging, which are intertwined to amplify and reinforce each other. These show that belonging is achieved when employees feel that

- they are seen, heard, and valued as an individual in one's organization,
- their contributions are valued and respected by the organization,
- they have a sense of connectedness with colleagues,
- they have the organizational knowledge to succeed, and
- they are aligned with the organization's purpose and mission.



BELONGING LOOKS AND FEELS LIKE...



FIGURE 1.

Excerpts from focus group discussions and interviews with corporate employees and people leaders to the questions, “What words come to mind when you think of belonging?” and “Tell us about a time when you felt a sense of belonging.”



FIGURE 2.

Word cloud of responses in focus groups to the question, “what words come to mind when you think of belonging?”

# WHY BELONGING MATTERS

Psychologists have long established that belonging is a fundamental human need.<sup>11</sup> Humans require meaningful and positive relationships with others and emotional connections to and with social groups.<sup>12</sup>

Belonging has significant impacts on people, including how they view themselves and their mental health. Belonging plays a critical role in how people view their place in the world and can foster a sense of home to a particular place and community.<sup>13</sup> When a sense of belonging increases, loneliness, depression, suicidal ideations, and attempts decrease.<sup>14</sup> Belonging is also linked to achievement. A 2007 study found that when college students were presented with threats to belonging, academic performance dropped. But when doubts about belonging lessened, academic achievement increased, particularly amongst Black students.<sup>15</sup> At a broader societal level, isolation and lack of connection with others breeds division and divisiveness. We are witnessing the implications from a lack of belonging play out on social media through hate speech, misinformation, and more.

## Belonging holds significant business value.

Organizations that prioritize belonging in the workplace experience increased productivity with higher employee job performance.<sup>16</sup> Workplaces with a strong sense of belonging encourage risk-taking and even failure amongst employees, resulting in greater creativity and innovation.<sup>17</sup> Belonging can also increase employee

communication and knowledge sharing.<sup>18</sup> Belonging has key implications for attracting diverse talent and retaining existing employees. Employees who feel a strong sense of belonging are more likely to recommend their organization to others.<sup>19</sup> An analysis of former tech employees revealed that these findings are intensified for employees from underrepresented backgrounds (e.g., women, underrepresented people of color, LGBTQ+).<sup>20</sup> Meanwhile, employees who feel connected to their organization have increased employee satisfaction and decreased turnover risk.<sup>21</sup>

A study by BetterUp revealed high employee belonging resulted in a...



**56%**

increase in job performance



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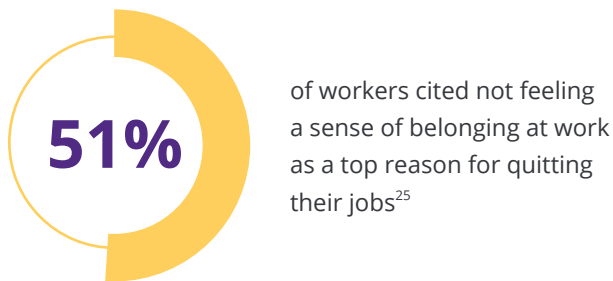
For a 10,000-person company, this would result in annual savings of more than

**\$52 million**<sup>22</sup>

Yet, our needs for belonging are not being met.

In the midst of the great resignation, belonging should be top of mind for every business leader in every industry.<sup>23</sup> Between April 2021 and November 2021, nearly 33 million workers quit their jobs, with a record-breaking 4.5 million people walking off the job in November 2021 alone.<sup>24</sup>

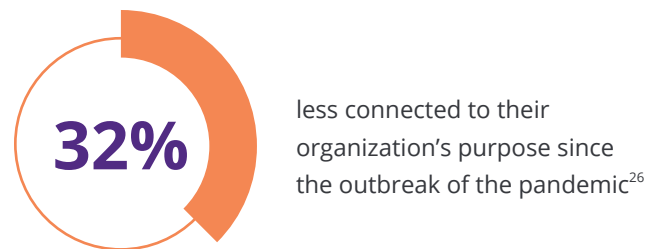
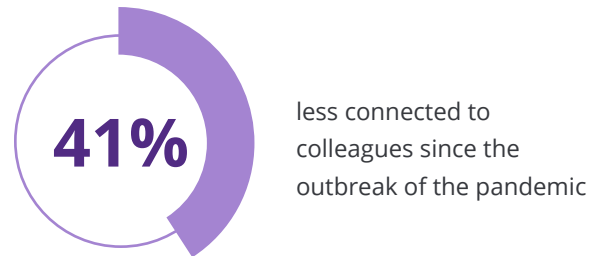
#### A 2021 McKinsey survey revealed that...



Research finds that, in general, the more dimensions of diverse identities employees have, the less likely they are to feel included and valued in their organization.<sup>27</sup> We see this with belonging as well; according to a 2021 McKinsey study, employees who classified themselves as non-White or multiracial were more likely to report not feeling a sense of belonging at their workplace.<sup>28</sup> The pandemic has further exacerbated these sentiments for historically marginalized people. As of January 2022, issues prompted by the pandemic—including closures of school and care facilities—have led to higher burnout rates for women, who often shoulder caretaking responsibilities.

Spikes in resignation driven by employees re-evaluating their priorities and values amid toxic culture, burnout, and diminishing feelings of connection highlight the critical need to center belonging.

#### According to a global survey taken at the end of 2020, HR leaders believed employees are...



#### According to a McKinsey study...



# WHAT DOES IT TAKE TO FOSTER BELONGING?

There are five drivers to foster belonging:

- establishing inclusive work environments,
- creating connectivity opportunities,
- having and executing organizational values and principles,
- solidifying acknowledgment and accountability structures, and
- maintaining work-life boundaries.

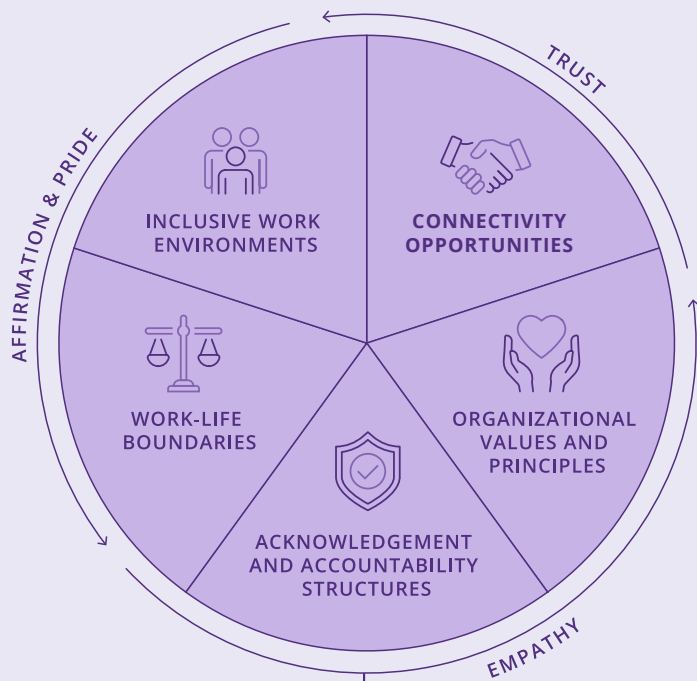
These drivers lead to an environment where employees feel affirmation, pride, empathy, and trust. This helps create a psychologically safe culture. Psychological safety allows employees to be vulnerable with who they are and more easily connect with others, creating a reinforcing loop, which is key to belonging.<sup>30</sup> Psychological safety is especially important for diverse teams to excel.<sup>31</sup> Our Belonging Framework (see Figure 1) captures what it takes to foster belonging. For more on each driver, including why and how they are important, check out our primer on Belonging Drivers & Elements on our [Playbook site](#).

It is important to remember that advancing a culture of belonging is the responsibility of organizations and their leaders. In addition to the above drivers, leaders must put their own Equity Fluent Leadership into practice. For more information about how belonging can vary across levels in an organization and the role of managers in enhancing it, see Box 2.

## BOX 1. THEORETICAL FOUNDATION OF THE BELONGING FRAMEWORK

Our framework is grounded in findings from a host of academic and non-academic/practitioner literatures, including several key works:

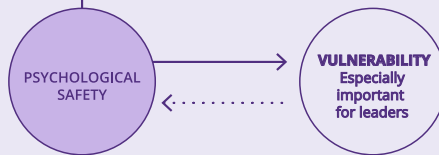
- “The Need to Belong: Desire for Interpersonal Attachments as a Fundamental Human Motivation” (Baumeister & Leary)
- “Where Do I Belong? High-intensity Teleworkers’ Experience of Organizational Belonging” (Belle et al.)
- “The Value of Belonging at Work” (Carr et al.)
- “The Power of Belonging: What it is and Why it Matters in Today’s Workplace” (Coqual)
- “Belonging at Work: The Experiences, Representations and Meanings of Belonging” (Filstad et al.)
- “What Does It Take to Build a Culture of Belonging?” (Kennedy & Jain-Link)
- “Belonging: From Comfort to Connection to Contribution” (Volini et al.)



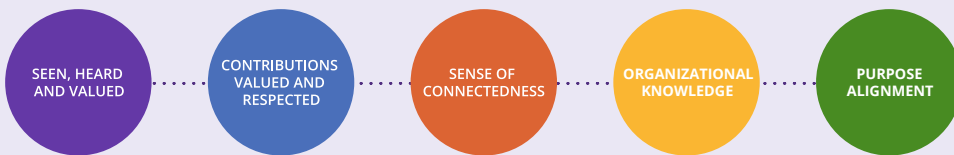
FIVE DRIVERS

Creating an environment of belonging starts with **five drivers**.

These five drivers lead to an environment where employees feel affirmation, pride, empathy, and trust.

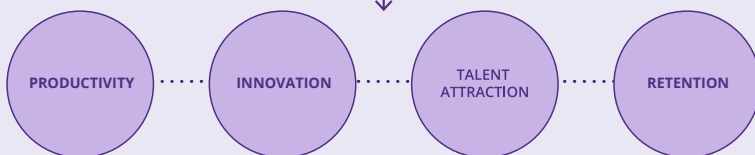


In turn, that helps to create a psychologically safe culture and opportunities for vulnerability.



ELEMENTS OF BELONGING

Finally, we arrive at the **elements of belonging**.



ORGANIZATIONAL BENEFITS

Which results in **organizational benefits**.

## BOX 2. LEVELS OF BELONGING IN AN ORGANIZATION

There are different layers to belonging in an organization: team, department, office, and in some cases, regional offices and/or global organization. For example, an employee might feel they belong on their immediate team but lack a sense of belonging in their broader office.

Belonging starts at smaller levels and builds out. The most crucial employee experience is day-to-day.<sup>32</sup> It is most important to feel belonging in an immediate team. Managers play a critical role in helping construct a sense of belonging (or not) on teams.<sup>33</sup> At the same time, managers must beware of the temptation to create *exclusive belonging* among their team(s) at the expense of

*inclusive belonging* to the broader organization and society as a whole. Inclusive belonging is about all individuals feeling welcomed, appreciated by, and meaningfully part of an organization. Exclusive belonging, on the other hand, is where someone may feel they belong to a specific group or part of the organization, but at the expense of another group or the broader organization.

To foster belonging across a global organization requires bridging across cultural differences, language barriers, and time zones. It requires being intentional in drawing parallels—including common experiences, priorities, passions, and goals—across teams, offices, and geographical boundaries to foster belonging across this outermost level.



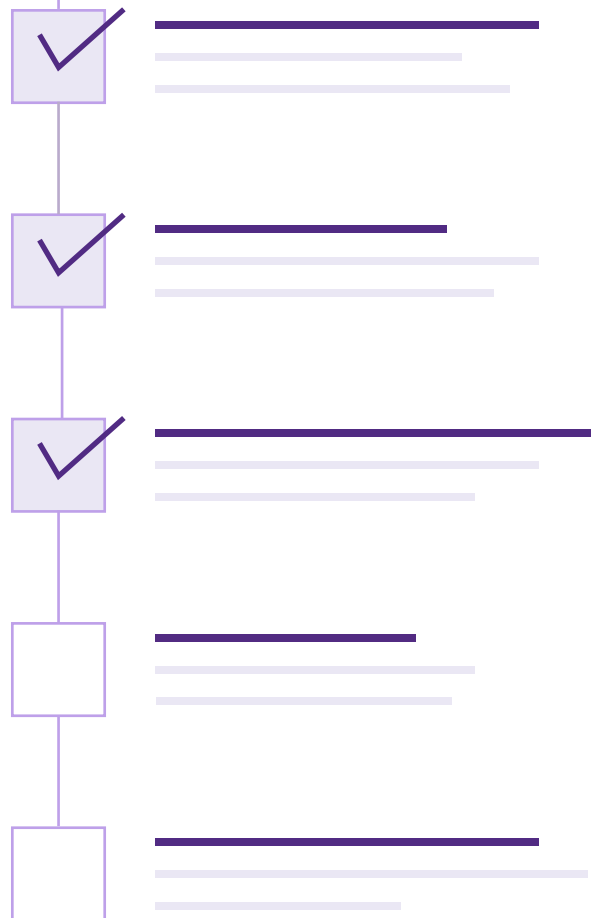
# WHAT ARE THE STRATEGIC PLAYS TO ENHANCE BELONGING?

## THE STRATEGIC PLAYS

There are strategic plays to enhance belonging. Various plays are marked specifically for business leaders, managers, and HR or DEI teams. If there is not a particular clarification, then the play is relevant for all employees. We highlight tools that can be employed to help with some of the plays. These are examples and not exhaustive. It is critical to be aware of concerns related to data privacy, surveillance, and lack of transparency—particularly for tools using AI and machine learning. See our briefing on the role of technology in enhancing and measuring belonging on our [Playbook site](#) for more on tools, trends, concerns to keep in mind, and a list of questions that are critical to ask before using or deploying such tools.

To identify which plays to prioritize, use our rapid diagnostic tools (found on our [Playbook site](#)). These diagnostics are designed to identify the drivers that need the most work, and select plays to implement in response. We suggest the following:

- Managers and leaders take the Belonging Leadership Rapid Diagnostic to identify individual actions to prioritize.
- DEI/HR leaders take Belonging DEI/HR Rapid Diagnostic to identify organizational actions to prioritize.





## INCLUSIVE WORK ENVIRONMENTS

### 1. Hold meetings where all participants feel supported, can actively participate, and are heard.

SEEN, HEARD AND VALUED

SENSE OF CONNECTEDNESS

- For team meetings, start with personal prompts (e.g., have participants share a rose and thorn about their week, something they are grateful for, or something they are excited about).

#### EXAMPLES OF TOOLS TO USE

**Belonging Sparks**, a tool developed by EGAL, provides leaders with a set of personal prompts to choose from and use at the beginning of meetings. The prompts can be accessed as a physical deck of cards, or, for hybrid and/or virtual meetings, through an online image wheel. Both versions of the tool are only available through the [Playbook site](#).

- For all meetings, build in several minutes for small talk in the beginning. This can help create connectedness vs. jumping directly into the topic at hand.
- If someone is interrupted in a meeting, speak up to say, "I think \_\_\_\_ had something they wanted to share," and give them opportunities to be heard.
- If someone hasn't had a chance to speak up in a meeting, ask if they have anything else they'd like to add.

- Practice active listening. This includes paying attention and avoiding email or other distractions, showing that you're listening, such as through eye contact, and responding thoughtfully.
- **[Managers]** When new people join your team or join existing standing meetings, have a check-in conversation with the individual to share more on how the meetings are run and any other informal standards in place (e.g., if live meetings are where decisions are generally made, make sure the individual knows this to be able to prioritize meetings). If the team also tends to communicate on certain platforms that the individual may not be used to (e.g., Slack), tell the individual and offer opportunities for them to learn the tool if they aren't familiar with it.
- **[Managers]** Agree on engagement expectations and ensure all meeting participants feel that they can participate in the way that is best for them. For example, discuss communication preferences and expectations. Encourage those who don't speak up to email or speak to you after they have time to process information.
- **[HR / Leaders]** Ensure that all-hands meetings are inclusive by offering them both virtually and in-person. Consider doing them at different days/times in case some employees are unable to make certain times.
- **Remote or hybrid**
  - When leading meetings, create spaces for everyone to speak up / ensure no one is being spoken over. If there are hybrid meetings (in-person, virtual, and/or phone attendees), incorporate pause points and make sure you are creating space for attendees who are not in person to speak up.
  - Prioritize accessibility in virtual spaces (closed captioning, chat options, etc.). Think

ahead about what employees might need so that they don't have to request their own accommodations. Commonly used tools such as Webex,<sup>34</sup> Microsoft Teams, and Zoom have closed captioning capabilities.

→ While there are varying perspectives on mandating cameras for virtual meeting attendees, here are some things to consider:

- Video calls at home operate in a gray area of work-life boundaries. Respect if people need to have their video off. In these cases, it may be helpful for the individual to note that they will be camera-off upfront.
- Consider if there are people in the meeting that may have accessibility needs and benefit from lip reading (and cameras on).
- If there are meetings where having cameras is especially important, leaders can communicate that expectation in advance.

→ If on a global team, be mindful to check time zones for the various employees expected to attend the meeting. If the meeting must occur at a time that is particularly late or early for certain employees, let them know why the decision to hold the meeting at a particular time was made. Do not make it a regular practice if possible.

## 2. Create inclusive physical and virtual spaces.

SEEN, HEARD AND VALUED

SENSE OF CONNECTEDNESS

PURPOSE ALIGNMENT

- [Leaders / DEI Leads] Ensure any representations of people in physical organization spaces are diverse.

→ **Remote:** For virtual meeting room backgrounds, ensure images of people are diverse.

→ [HR] Ensure there are open spaces for employees to meet and connect. Consider co-creating these spaces with employees by asking employees what types of furniture, art, and activities they would like to see. Prioritize accessibility of physical spaces while also ensuring physical safety in all spaces.

- [HR / DEI Leads] Ensure there are accessible, private, and comfortable spaces for breast pumping, as well as for prayer or meditation practices.

- Ensure that representations of people used in images or illustrations for external purposes (e.g., branding/product materials) are diverse.

- If providing food, accommodate food restrictions (e.g., kosher, allergens).

## 3. Prioritize inclusive and precise language.

SEEN, HEARD AND VALUED

- [HR / DEI Leads] Offer workshops to employees to understand the role of language and how to practice precise and inclusive language in day-to-day communications internally. For example, listening to how people describe themselves and honoring their identity, practicing using precise language, and avoiding potentially harmful metaphors. Check out more on good language practices in our playbook on [language for racial equity and inclusion](#).

- [HR / DEI Leads] Create a catalog of definitions for terms related to diversity, equity, and inclusion so that everyone is on the same page in terms of what these terms mean in the organization. For a

resource on DEI-related terms, see our [EFL Glossary of Key Terms](#).

- Ensure inclusive and precise language is incorporated into practices externally, including in how your brand is represented.
  - Embed inclusive language practices in internal communications. For example, normalize adding pronouns and name pronunciations to email signatures, ensure that surveys have inclusive identity fields and/or allow for self-identification, and make space for employees to share and go by their preferred name when it differs from their legal name.
  - If on a global team, reflect on English language defaults and try to be inclusive of employees in different locations and who speak different languages. This can include, for example, developing different resources in different languages. Also, be aware of and try to avoid using culturally specific idioms.
- **Remote:** If there are participants that don't speak the language the meeting is held in as their first language, record team/group meetings so participants can review what was discussed.





## CONNECTIVITY OPPORTUNITIES

### 4. Create formal and informal opportunities for employees to connect.

SEEN, HEARD AND VALUED

SENSE OF CONNECTEDNESS

ORGANIZATIONAL KNOWLEDGE

- **[Managers]** Schedule and maintain one-on-ones with supervisees. Then limit distractions to practice active listening with supervisees. Incorporate in that time questions and opportunities to know them as an individual.

#### EXAMPLES OF TOOLS TO USE

**Pingboard** and **CultureAmp** have features that enable guided one-on-ones, wherein both the manager and their supervisee are given open-ended prompts (such as, “what are you grateful for this week?”) to prepare for the meetings and are encouraged to co-create the agendas.

**Lattice** is another tool whose platform provides templates for one-on-ones. Managers and their supervisees can co-create agendas and action items, and previously set goals, feedback, and growth plans are available in one cohesive view.

**Microsoft VIVA** uses calendars and Microsoft Teams data to give managers insights about the need for additional one-on-ones with certain team members and *nudges* them to schedule these meetings through stay connected nudges.

- **[HR / Managers]** Create programs for people in the organization who may not know each other (whether at different levels or in different teams) to get lunch or coffee/tea.

→ **Remote:** Schedule virtual coffee or watercooler chats (short, informal video calls). Ensure leaders participate (even if they are largely or fully in person) and have people at different levels meet in these chats.

#### EXAMPLES OF TOOLS TO USE

**Humu** can send out nudges to boost informal connections when organizations find (through pulses/surveys) that new communication habits could improve productivity and belonging at work.

For virtual coffee chats, the **Slackbot Donut** can help with automating nudges encouraging these virtual, informal chats. Customize how nudges are sent out, like choosing to make connections between employees across geographies, across leadership levels, around shared interests, and more. Donut has functionalities that allow organizations to set templates and prompts for these meetings.

- **[HR / Managers]** Have regular opportunities for team members as well as employees more broadly to connect with each other—such as through off-site picnics, sporting events, and snack break afternoons.

→ **Remote:** Ensure there are opportunities for remote gatherings if you have remote employees, such as sending employees art boxes to do a virtual art activity or a virtual cooking class. For global organizations, have different cultural food experiences and allow

employees from different cultures to be able to share their food and culture. Offer these activities to all employees (not only remote).

- Ensure informal opportunities for connections are provided for, accessible to, and inclusive of different cultures and personal life responsibilities (e.g., caretaking).

## 5. Establish mentorship opportunities & ERGs.

SENSE OF CONNECTEDNESS

ORGANIZATIONAL KNOWLEDGE

- [HR / Leaders] Establish formal mentoring programs (peer mentoring & vertical mentoring) to foster community and enhance organizational knowledge.

### EXAMPLES OF TOOLS TO USE

**The Mentor Method** uses a double-blind algorithm to match mentors and mentees across the organization. Its platform provides scheduling options for in-person or virtual check-ins and allows participants to link check-in agendas to their own goals and measurable outcomes.

**Turazo's Conversation Networks** takes a nontraditional approach to mentorship. It uses machine learning to match mentees with relevant mentors/leaders across the organization based on their learning goals and desired conversation topics. Mentees can then use the integrated scheduling tool to set up one-on-one mentorship conversations, and can also provide feedback via Turazo's platform.

- [DEI Leads / HR] Offer ERGs, but ensure these do not operate in silos. Ideally, create event opportunities for ERGs to connect and facilitate events that bring together different identities. Ensure ERGs are welcome to allies. Lastly, provide ERGs with funding for events and gatherings.

- [DEI Leads / HR] Create space for ERGs to weigh in on broader issues/crises that are relevant to the identities of folks in the ERG. For example, following the murder of George Floyd, organizations looked to Black ERGs to support other Black employees and think about responses the company could take. While ERGs can be seen as a helpful resource, do not place the full burden of response, education, and action on them. If they choose to take on this extra work, consider offloading some of their regular work responsibilities to make space for this work and ensure these contributions are recognized and rewarded, such as through formal performance reviews.

- [DEI Leads / HR] Create spaces to celebrate different identities and cultures, for instance by working with ERGs. This could involve, for example, working with an ERG interested in celebrating a heritage month or day (e.g., International Women's Day, Juneteenth) and providing encouragement and resources related to funding, space, and communications.

→ Check out more on **developing ERGs** in this play from our Supporting Dual Career Couples playbook.



## ORGANIZATIONAL VALUES & PRINCIPLES

### 6. Leaders – Refine the organization’s mission, vision, and purpose and link to employees day-to-day.

CONTRIBUTIONS VALUED AND RESPECTED

PURPOSE ALIGNMENT

- Ensure the organization has a clear mission, vision, and purpose. Have this be communicated to all employees during onboarding and reminded regularly to employees, such as during performance reviews.
- Help employees connect the mission, vision, and purpose to their day-to-day work and specific objectives. Support employees as they eliminate work that does not align with the organization’s mission/vision through regular reviews of tasks, objectives, and results.

#### EXAMPLES OF TOOLS TO USE

Objective and key result (OKR) management tools, such as **Ally.io**, can be leveraged here. By allowing organizations to create shared OKRs and link them across projects and tasks, Ally.io lets leaders, teams, and opportunities see how their tasks link to their organization’s overall objectives, as well as the impacts of their work on broader workstreams.

**Lattice** is another tool that not only lets leaders set goals and OKRs on its platform but also lets managers create career growth plans and check-ins with their direct reports that can be linked to these OKRs. The aim is to make expectations clear and aligned with the organization’s growth.

### 7. Leaders – Establish clear organizational values and create *standards of citizenship* linking to those values.

SEEN, HEARD AND VALUED

- Develop clear values or principles that are communicated to all employees as employee expectations and responsibilities.
- Set standards of citizenship, which outline expectations regarding welcomed and unacceptable attitudes and behavior. For example, organizational leaders should celebrate and encourage voicing dissension; however, these perspectives should not be harmful or offensive to others. Standards of citizenship create guidelines for healthy engagement in the face of disagreement. Have this be tied to the values of the organization. Be transparent about what will happen if the standards are not upheld.
- Model these values, principles, and expectations. Then provide and share concrete examples of how you live these values, principles, and expectations in the management of the business. What have you done in the name of the organizational values? How do you bring the values to life, even—especially—when it is hard?



## ACKNOWLEDGMENT & ACCOUNTABILITY STRUCTURES

### 8. Give recognition and reward people for their work contributions.

CONTRIBUTIONS VALUED AND RESPECTED

PURPOSE ALIGNMENT

- Give positive reinforcement and offer recognition for jobs well done. While both peers and managers can provide recognition and positive reinforcement, it is particularly important for managers and leaders to do so. They should also be cognizant not to express favoritism and be aware of biases in acknowledging and expressing recognition. Also, recognize that people may like to receive recognition in different ways. For example, some may be more comfortable with private than public recognition. Recognition should be provided continuously.

#### EXAMPLES OF TOOLS TO USE

**Leapsome** and **PeopleHum** have public praise/recognition walls.

**Microsoft VIVA** nudges employees to share kudos directly with their peers. In some cases, managers can sign up to be notified when their direct reports receive recognition or even draw on past praise they've sent to their direct reports and integrate them into their performance reviews.

- **[HR]** Create prizes and awards for people who are doing well to recognize their contributions. Consider co-creating awards or prizes with employees or offering them the ability to choose how they are rewarded.

#### EXAMPLES OF TOOLS TO USE

**Empuls** gamifies its reward systems. Organizations can set up badges and recognition leaderboards between teams to encourage healthy competition, which can then be linked to real-life reward options (e.g., gift cards). Organizations can measure the impact of such programs by viewing trends across teams to ascertain links between rewards, employee performance, and business metrics.

**Espresa** establishes a points system for work accomplishments, which can translate into swag, gift cards, and other real-life rewards.

- **[HR / Managers ]** Pay people commensurate with their contributions and experience. To ensure this is done fairly, conduct pay equity analyses on a regular basis and before pay or bonus review cycles so that any discrepancies can be addressed as a matter of course and not after they have built up over time.



## 9. Update job descriptions and provide key information in hiring.

SEEN, HEARD AND VALUED

ORGANIZATIONAL KNOWLEDGE

CONTRIBUTIONS VALUED AND RESPECTED

- [HR]** Within job descriptions and team descriptions, clearly connect how individual and team outputs link to the larger organizational goals and mission.
- [HR / Managers]** Ensure language in job descriptions doesn't dissuade certain groups from applying and have job descriptions in appropriate languages for the particular job, location, and context.

### EXAMPLES OF TOOLS TO USE

**Textio's** Employer Brand product can scan organizations' brands and hiring content for harmful, imprecise, and/or unnecessarily metaphoric language, with information about why such language might exclude certain applicants, and nudges that suggest more inclusive language.

**UInclude** is another such product with a focus on the hiring process. Its Inclusive Writing Tool scans job descriptions for gender-biased and racially exclusive language, and nudges organizations to use more inclusive alternatives.

- [HR / Managers]** When employees are hired, ensure there is clarity around how to formally grow into new roles and positions. Have this be communicated in writing (so employees can consult the information) and verbally.
- When employees are hired, communicate to them informal rules of the game around how the organization operates and tips to be successful.

## 10. Ensure transparency in career development opportunities.

ORGANIZATIONAL KNOWLEDGE

- [HR / Managers]** Be transparent about and share career development information and internal opportunities. Also, ensure there is clarity on the benefits available to employees to support them to grow in the organization.

## 11. Ensure performance review processes are equitable and add metrics around efforts to enhance belonging.

CONTRIBUTIONS VALUED AND RESPECTED

- [Leaders / HR]** Ensure performance reviews do not inadvertently penalize certain groups or individuals. This includes ensuring annual-review criteria does not depend on facetime and formal mentoring programs that may rely on personal connections or inadvertently penalize people who choose to take advantage of flexible work opportunities. Also, recognize how bias related to gender and race, for example, may come into play in performance reviews and work to mitigate such bias.
- [HR]** For managers and leaders, incorporate the ability to support belonging as a key metric. Within 360 reviews, include questions and reflections on the ability to support belonging in teams (e.g., creating quality connections between employees, helping employees feel seen and heard, etc.) and create conditions for psychological safety.

## EXAMPLES OF TOOLS TO USE

**Glint** allows managers to conduct 360s via the platform. Leapsome is another tool through which organizations can run 360 reviews, anonymous leadership reviews, and leadership self-assessments. **Leapsome** also provides best-practice templates and frameworks for setting up comprehensive review cycles as well.

**Culture Amp** also operates in the performance review space. It aims to mitigate bias in performance review processes by building on science-backed templates and seeks to streamline the process by giving managers a cohesive view of their 360 feedback, goals/OKRs, and one-on-ones.

EGAL's **Performance Review Questions for Managers** (available through the [Playbook site](#)) provides a set of questions for 360 feedback surveys to evaluate managers and leaders on their ability to support belonging.

[HR] For all employee performance reviews, incorporate reviews and feedback on the ability of employees to support peers, including helping them feel seen and heard. Ask employees questions that prompt them to provide examples of how they help their peers feel seen, heard, and valued.

[Leaders / Managers / HR] Reward leaders and employees who demonstrate and practice behaviors that advance belonging. Hold leaders and employees who foster toxic workplaces accountable. In some cases, that might mean firing them.





## WORK-LIFE BOUNDARIES

12. Provide and enable employees to take advantage of caretaking support and flexible work opportunities.

SEEN, HEARD AND VALUED

- [HR]** Provide caretaking support—i.e., benefits—for all caretakers, including parents and those taking care of family / chosen family. Ensure all employees understand and are able to take advantage of these policies without any unintended consequences. See more in this play on **childcare and eldercare** from our playbook on **Supporting Dual-Career Couples**.
- [HR]** Offer flexible work opportunities related to both location and time. Be aware of potential unintended consequences. For example, people working more remotely (predominantly women who tend to juggle the majority of caretaking responsibilities)<sup>35</sup> may not have as many opportunities to be physically seen in the office, which can impact nominations for promotion. See more in this play to **enable flexible work** from our playbook on Supporting-Dual Career Couples.
- [Managers]** Create and maintain balance between those working remotely and those in the office by recognizing differences in resources and visibility. Then, make concerted efforts to correct those differences. For resources, this can include but is not limited to ensuring remote workers have access to the same ergonomic workstations. For visibility, this can include equally recognizing remote and in-person employees for work well done.

13. Ensure employees are able to maintain healthy boundaries between work and personal life.

SEEN, HEARD AND VALUED

- [Managers]** Model and encourage healthy boundaries between work and personal life, recognizing that employees have different/additional responsibilities. For example, encourage no emails or calls during non-work hours and model this yourself. Also, remind employees to take advantage of benefits and model them yourself. If you cross these boundaries, acknowledge when it occurs and work to improve.

### EXAMPLES OF TOOLS TO USE

**Microsoft VIVA** uses data from Microsoft Teams, Outlook, and other Microsoft 365 apps and provides employees with nudges around scheduling protected / no meetings times.

- [Leaders]** Normalize protected time for employees' mental well-being, learning, and development. This can include, for example, providing paid mental health days and encouraging employees to take these—or better, taking them yourself.

### EXAMPLES OF TOOLS TO USE

**Microsoft VIVA** has well-being nudges that encourage this behavior. For virtual work settings, it includes “virtual commute” options that allow employees to engage in guided meditations through external apps like Headspace to close out their workday, and options to schedule breaks in their calendars for coaching and other curated learning opportunities.

- [Leaders]** Ensure the work culture doesn't encourage an always-on mentality and encourage taking breaks.



## LASTLY, PUT EQUITY FLUENT LEADERSHIP INTO PRACTICE.

More than just strategic plays to put into action, this is about your mindset, ongoing behaviors, and leadership ability. These are critical for leaders today and are key across all the belonging drivers.

### 14. Leaders – Model vulnerability.

SEEN, HEARD AND VALUED

SENSE OF CONNECTEDNESS

- Share failures and lessons learned related to leadership and work practices. This can help create psychologically safe spaces.
- Demonstrate vulnerability by sharing personal stories with employees, such as in one-on-ones. This vulnerability can indicate and support a human connection that makes employees feel more psychologically safe and creates space for people to share back if desired. However, it's important these stories are appropriate to share with colleagues. Also, don't necessarily expect vulnerability in return; supervisees may not want to share personal details of their lives and this is fine. Encourage story sharing that is also appropriate for the workplace.
- Recognize and praise others when they also model vulnerability.

### 15. Leaders – Receive feedback, practice active listening, and respond with action.

SEEN, HEARD AND VALUED

- Create avenues for employees to anonymously share challenges in the workplace (e.g., a virtual support or feedback box). Ensure feedback employees share is taken into account and addressed. Have accountability mechanisms so this happens.

#### EXAMPLES OF TOOLS TO USE

**Rungway** allows employees to ask questions or start discussions around workplace issues on its communications platform. Employees can choose whether or not to remain anonymous, and leaders can interact with this content directly.

**PeopleHum** has a virtual suggestion box capability that allows organizations to source ideas across departments and geographies. The suggestions are then open for comment and/or questions by peers or leaders.

- Practice transparent communication to have employees feel heard. When employee surveys and feedback tools are provided, prioritize the sharing of results and responses to feedback even when the results are not what leadership wishes. For example, leaders may feel strongly that local employees should be encouraged to return to the office for 1 to 3 days per week, even when employee surveys suggest that 50% of employees would prefer to continue to work remotely. This is an opportunity

for leaders to share the survey results and explain their reason for encouraging different behavior in the interest of company culture and cohesion.

- In meetings, encourage constructive conflicts and for employees to share honest feedback and opinions. Ensure there is psychological safety, whereby employees feel safe speaking up, asking questions, and making mistakes. Some strategies include asking for their thoughts, framing meetings as opportunities to share information, and being explicit about seeing differences as a source of value. Ensure employees aren't penalized for speaking up with ideas, questions, concerns, and/or mistakes. Reflect on your own experience and inherent privileges and consider that what worked for you on your journey as a leader may not work for others that have different backgrounds, experiences, characteristics, and preferences.

→ For more strategies on psychological safety, see this HBR article, [“To excel, diverse teams need psychological safety”](#).



## 16. Leaders – Build your own equity fluency and inclusive leadership skills.

SEEN, HEARD AND VALUED

CONTRIBUTIONS VALUED AND RESPECTED

- Require managers and leadership to go through training on inclusive leadership and creating a team culture where all feel psychologically safe. Managers should be people leaders—not just performers. Managers should also be taught about the importance of expressing vulnerability as part of inclusive leadership and psychologically safe spaces. Ensure that these abilities are then assessed through formal review processes.

### EXAMPLES OF TOOLS TO USE

**Emtrain** and **BetterUp** leverage networks of coaches specialized in DEI and belonging to provide a variety of training on these topics. Employees' responses to quizzes and interactive learning prompts embedded in training can be used to assess feelings of belonging or exclusion within an organization. They can then inform nudges to encourage inclusive leadership behaviors.

**Glint** provides LinkedIn Learning content around inclusive leadership to managers based on the feedback they receive from their supervisees to curate personalized learning journeys.

- Work with HR to provide workshops for managers on how to have and facilitate difficult discussions.

→ Find some more information and tips in our [Guide to Having Difficult Discussions About Race & Identity](#).

## BE MINDFUL

As you implement the aforementioned plays, be mindful of concerns that may arise. When you hear employees express statements similar to the ones below, remember that belonging is deeply nuanced and contextual.

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### IF YOU HEAR...

*"If I don't practice vulnerability, I won't have a sense of belonging."*

### CONSIDER THIS...

Vulnerability starts with and must be modeled by managers and executive leadership.<sup>36 37</sup> Employees look to their managers and leaders to determine to what extent to open up and share. Employees need to feel safe exposing vulnerable aspects of their lives and identities. Employees don't owe their organizations or colleagues any peeks into their personal lives or intimate feelings. Managers should create space to allow employees to show up and share parts they feel most comfortable with.

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### IF YOU HEAR...

*"Belonging to an organization requires me to prioritize the organization, even at the cost of my work-life balance." OR "I have other priorities, but will I belong less if I don't participate in all the connection opportunities."*

### CONSIDER THIS...

To combat loneliness and isolation, particularly during remote work, researchers encourage creating additional opportunities for workers to socialize.<sup>38</sup> But, this could infringe on employees' work-life balance.

Women shoulder most household and caregiving responsibilities globally<sup>39</sup> and may not have the capacity to engage in after-hour social activities. It's important to ensure connection opportunities are not perceived as mandated and that people aren't penalized for not taking advantage of them.

Make sure to host engagement activities and events during normal business hours so employees don't feel like they have to sacrifice their personal lives to build meaningful connections in their workplace.

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### IF YOU HEAR...

*"Belonging to an organization can mean giving up part of my authentic self in order to blend in." OR "Isn't belonging just assimilating?"*

### CONSIDER THIS...

Traditional notions of belonging can teeter on the line of assimilation. Whether employees voice it or not, this may be on their minds. Organizations should be cautious not to encourage employees to bend or conform to the organization. John A. Powell, Director of the Othering & Belonging Institute at UC Berkeley, asserts that belonging is not about assimilating or even joining something.

Rather, **belonging is about co-creation**. Co-creation of the environment by all involved leads to a more sustained and inclusive sense of belonging. Instead of mandating organizational norms from the top down, consider including employees in the development and ongoing iteration of them.

Feedback and evaluations should be grounded in work-specific topics rather than on aspects like what people wear, language/dialect, or upbringing that don't directly tie to employees' roles.<sup>40</sup> HR decision-makers

and organizational leaders can take the opportunity to re-evaluate how hiring and promotion standards might encourage candidates to fold to organizational norms.<sup>41</sup>

Ask yourself what “fit” at your organization actually means. Who most fits the mold of an ideal worker at your organization, and whom does that mold exclude? To avoid hiring and growing workers who are all alike, consider a culture add model. This approach emphasizes employees’ unique contributions to scale and boost the organization’s culture, not just duplicate it.<sup>42</sup>

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**IF YOU HEAR...**

*“Belonging can’t happen in a virtual environment. If I’m not in-person, I won’t belong.”*

**CONSIDER THIS...**

Instead of jumping into business on team calls, set aside the first 10–15 minutes to connect on non-work tasks. Insights from interviews and focus group discussions show that employees value and deeply appreciate when managers carve out time to connect informally before diving into the meeting. Offer co-creation opportunities for this time by having different employees prepare a conversation starter or prompt. Innovations like Slack’s **Donut** pair employees for virtual coffee chats.

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**IF YOU HEAR...**

*“Is it my job to feel like I belong? Is it on me if I don’t feel like I belong?”*

**CONSIDER THIS...**

The responsibility of belonging is not on the person who feels *othered* (see the glossary of terms for definition). The onus falls on organizations and leaders to create an inclusive environment where employees from all walks of life feel they can belong. The aim is not to “fix”

marginalized individuals to make them feel like they belong. Instead, the goal is to create a culture that systematically reduces or eliminates systemic bias and racism in the workplace that fuels feelings of isolation and othering.<sup>43</sup> Affirm to employees that it’s not their job to feel like they belong. Engage in thoughtful and transparent conversations with employees to understand the organizational practices and spaces that create othering and craft solutions to tackle them.

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**IF YOU HEAR...**

*“What if I don’t want to belong?”*

**CONSIDER THIS...**

Don’t assume all employees’ belonging needs will be the same. It’s important to recognize that different people will have different desires around how much they will want to feel they belong in the organization—and that’s okay. This is a great opportunity to focus on the co-creation aspect of belonging: provide employees with opportunities to share what they envision belonging feels like for them and co-create actionable steps to achieve this. Remember that belonging is not a one-size-fits-all.

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**IF YOU HEAR...**

*“If I’m vulnerable and honest, I’m going to be punished. You won’t like what I honestly think.”*

**CONSIDER THIS...**

As mentioned, employees’ belonging needs will differ. Some will not want to be as vulnerable, and that is okay. Some may also be concerned that if they share honestly, they will be punished. Leaders and managers need to create psychologically safe environments where diverse perspectives are encouraged and where employees know they will not face any unintended consequences for sharing their honest opinions.

# BEWARE OF CHALLENGES TO ENHANCING BELONGING

Efforts to enhance belonging can face roadblocks and challenges. While not comprehensive of all challenges, we outline some particularly prominent ones.

## Organizational challenges

- **Lack of diversity in teams and/or in organizational leadership:** It's critical for people to see people like themselves represented in leadership to have everyone feel that they belong in an organization. Lack of diversity in teams, and particularly in leadership representation, is a hindrance to having all team members feel they belong.
- **Organizational culture rewarding assimilation:** Without meaning to, organizations can reward assimilation, and people may feel they need to assimilate to belong at the organization.
- **Lack of accountability and incentives for supporting belonging:** Supporting a culture of belonging requires leaders, managers, and also employees to create inclusive environments, which can take time. However, these skills and priorities may not be recognized and rewarded in performance reviews and can lack both incentives and accountability.
- **Leadership not responding to important social movements:** We are going through a tumultuous time with increasing recognition of and calls to dismantle systemic racism and other -isms in society. Leaders that don't respond or effectively respond to social movements and moments can cause schisms with employees who care about or are impacted by these movements. It can make

employees of all demographics and backgrounds not feel valued and/or feel frustrated.

- **Fatigue among those championing this work:** Advancing belonging in organizations and grappling with challenges takes time. It also takes grappling with the power dynamics of who holds power in organizations and who is seen and heard. Champions who take on this work can face exhaustion and fatigue. Ensuring those leading the charge are getting the support they need is critical.

## Societal challenges

- **Growing divisiveness:** The world today seems to be facing increasing divisiveness. This is reflected in rising rates of hate speech online<sup>44</sup> and, in the US, increases of laws gagging discussions of certain topics: including Tennessee's 2021 law prohibiting certain concepts of race and racism in schools,<sup>45</sup> and Florida's 2022 bill restricting discussions related to LGBTQ+ in schools and allowing parents to file lawsuits.<sup>46</sup> At the same time, a 2022 poll found that over half of Americans were silent in the past year due to concern of retaliation or harsh criticism.<sup>47</sup> Divisions bleed into workplaces and can result in tensions to enhance belonging.
- **Rapid shifts to remote working:** The global COVID-19 pandemic resulted in urgent shifts to remote working for many professional workers. Remote working has presented new challenges in feeling connected to one's organization, boss, and colleagues. Employees lost certain opportunities for informal connection, such as in-person coffee and lunch breaks. New strategies to enhance belonging can be employed in remote environments. And remember, there have always been challenges to creating connections and inclusive belonging in in-person work environments, including, for example, proximity bias: "an unconscious—and unwise—tendency to give preferential treatment to those in our immediate vicinity."<sup>48</sup>



- **Mental health issues & caretaking amidst the global pandemic:** The pandemic also brought with it increases in mental health challenges like anxiety and depression among youth<sup>49</sup> and adults.<sup>50</sup> Meanwhile, parents and caregivers struggle to balance the demands of working and caretaking in an environment with continual changes among schools and caretaking support, also contributing to mental health challenges.<sup>51</sup>
- **Increasing automation & worker surveillance:** As technology continues to advance, there is an increasing push toward automating more aspects of work for cost-saving and efficiency purposes. Meanwhile, technology trends include heightened worker surveillance. Some surveillance extends into the home without workers knowing, clearly a violation of work-life boundaries. Even tools built for DEI purposes can cross this boundary and have unintended consequences (as explored in our tech briefing).
- **Reduced job quality & contract work:** The decline of quality jobs is an ongoing trend. This includes increases in contract work in certain sectors, like tech.<sup>52</sup> Contract work can go to individuals or to smaller companies. Contractors tend to receive less pay and benefits. They can also be seen as replaceable or dispensable, so efforts to support belonging are not considered.

While many of these challenges are beyond the scope of leaders to address, leaders can mitigate such challenges in their own action plans by applying a strategic justice lens (see Box 3).

### BOX 3. USING A JUSTICE LENS TO MAKE SURE EVERYONE BELONGS

It is critical to recognize that different people will face different situations and challenges when it comes to belonging. After all, power and privilege are not equally distributed.

When identifying the plays to take action on and implementing them, a justice lens can be applied by asking:

- How might this play be experienced by different people across race, gender, ability, age, etc.?
- How can we ensure we aren't perpetuating inequities in terms of
  - Who is seen and heard?
  - Who is connected/networked, particularly to leaders and people in power?
  - Who receives praise/recognition, and who is left out?
  - Who accesses flexible work, and do different folks experience unintended consequences from doing so?
- Are we tracking impacts to ensure equitable outcomes for all employees?

# HOW CAN BELONGING BE MEASURED & WHAT FUTURE RESEARCH IS NEEDED?

Measuring belonging is critical and should not be done in an ad-hoc way. Rather, measurement should be built into formal measurement processes. There are a couple of ways to do this. Currently, many organizations use annual culture surveys to measure belonging—which serve as a time-bound snapshot.<sup>53</sup> These are helpful but may not always reveal employees’ true opinions.<sup>54</sup> Another method is routine pulse checks to help gather information and measure belonging. With pulse checks, ensuring that there is space for long-form responses can be valuable, and natural language processing can provide automatic sentiment analysis and theme identification. Leaders should communicate back results and feedback to employees in All-Hands and continue to express commitment towards enhancing feelings of belonging and inclusion through actions. Performance reviews are another opportunity to reinforce belonging while signaling to employees that supporting belonging for others is important and helping employees reflect on habits and behaviors that can support belonging.

→ See our measurement resources on the [Playbook site](#) for a survey tool to measure belonging. Regularly assess progress on belonging within your organization.

Within measurement, there are great opportunities to leverage technology tools and innovations.

→ Learn more in our briefing on the role of technology in enhancing and measuring belonging on the [Playbook site](#).

There are lots of unanswered questions and areas for future research:

- What are the pluses and minuses of ERGs in regard to belonging?
- How can these plays be adapted for and implemented in other workplaces like factories? Within factory-type settings, what implications related to power and justice might need to be considered?
- How does a sense of belonging change at different stages of the employee lifecycle?
- What are the impacts of different technologies on belonging, and how do we measure those? What are the unintended consequences of these types of technologies?
- What other unintended consequences exist when it comes to belonging interventions within workplaces?
- How are different leadership responses to external events/crises received—both immediately and as they play out over time—with respect to the sense of belonging within the organization?

We at EGAL can help by revisiting this in time to reflect on what has evolved and been learned.

# CALL TO ACTION

Enhancing belonging is critical for organizations and their employees. In the midst of the great resignation, leaders have an opportunity to reimagine the workplace. Get going by using the rapid diagnostic tools to identify gaps. Then get in some quick wins and develop an action plan to implement strategies and measure results. Remember that Equity Fluent Leadership is a journey—track your progress, acknowledge mistakes, and implement new learnings.

Importantly, leaders must acknowledge who holds power in organizations. Diversity within leadership matters for all employees to feel that they belong and can grow in the organization. Leaders must take a careful look at who else is represented in positions of power and create conditions for all employees to advance and lead in the organization. Also, organizations and leaders have immense opportunities to work towards inclusive belonging that fosters justice in their workforce and across society. Embrace the challenge of creating a truly multifaceted sense of belonging that brings a sense of belonging across the team and organization broadly.

Our final message is this: **How can you take action now so that people look back at this time period in 20 years and remember it not as the time not of the great resignation, but rather of the *great reimagination*?** We can then remember 2022 as a turning point in the evolution of organizational culture, the time that leaders daringly reimagined work to ensure all employees feel that they belong to ultimately grow and thrive.



# APPENDIX

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## GLOSSARY OF KEY TERMS

**Belonging (in organizations):** A deeply personal sense where an employee feels that they are a meaningful part of the organization.

**Culture add:** An emphasis on diverse characteristics and elements that address gaps and blindspots to enhance organizational culture, rather than replicating or “fitting” existing culture.

**Diversity:** The wide variety of shared and different personal and group characteristics among human beings. Diversity includes many characteristics that may be visible such as race, gender, and age, and it also includes less obvious characteristics like personality style, ethnicity, ability, education, religion, job function, life experience, lifestyle, sexual orientation, gender identity, geography, regional differences, work experience, and family situation that make us similar to and different from one another.<sup>55</sup>

**Employee Resource Groups (ERGs):** Voluntary, employee-led groups that foster a diverse, inclusive workplace aligned with organizational missions, values, goals, business practices, and objectives. Other benefits include the development of future leaders, increased employee engagement, and expanded marketplace reach.<sup>56</sup>

**Equality:** Equality highlights that in order to create a fair society, people should be treated the same regardless of need.<sup>57</sup>

**Equity:** Equity emphasizes that people have different needs, which might result in people being treated differently as a way to ensure fairness.<sup>58</sup>

**Equity Fluent Leadership:** Equity Fluent Leaders intentionally use their power to drive positive change and build an inclusive and equitable world. Equity Fluent Leadership is an ongoing journey.<sup>59</sup>

**Great resignation:** A phenomenon coined by organizational psychologist Anthony Klotz that describes the record numbers of people leaving their jobs during and after the COVID-19 pandemic.<sup>60</sup>

**Inclusion:** Providing equal opportunity to all people to fully engage themselves in creating an environment and a cultural attitude whereby everyone and every group fits, feels accepted, has value, and is supported by a foundation built on trust and mutual respect.<sup>61</sup>

**Organizational knowledge:** The ins and outs of how the organization operates. It includes the formal policies of the organization, as well as the more informal, unwritten norms and values.

**Justice:** Pursuit of equity in all aspects of society. Justice recognizes and considers that there is an unequal distribution of power, privilege, and capital.

**Languishing:** A sense of stagnation and emptiness. Languishing dulls motivation, disrupts the ability to focus, and increases the odds of cutting back on work.<sup>62</sup>

**Nudge:** An aspect of choice architecture that alters people’s behavior in a predictable way without forbidding any options or significantly changing their economic incentives. To count as a nudge, the intervention must be easy and cheap to avoid. Nudges are not mandates.<sup>63</sup>

**Othering:** A set of dynamics, processes, and structures that engender marginality and persistent inequality across any of the full range of human differences based on group identities.<sup>64</sup>

**Psychological safety:** The belief that you won’t be punished or humiliated for speaking up with ideas, questions, concerns, and/or mistakes.<sup>65</sup>

**Standards of citizenship:** A set of expectations regarding welcomed and unacceptable attitudes and behavior in the organization.

**Vulnerability:** The feeling we get during times of uncertainty, risk, or emotional exposure. This includes times when we’re showing our feelings, and we’re not sure what people will think, and times when we really care about something and people will know that we’re sad or disappointed when it doesn’t work out.<sup>66</sup>

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