



Cultivating a Personal Value Proposition

**A Handbook for Increasing DEI
Buy-in from Middle Managers**

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ABOUT THIS HANDBOOK

“Your focus should be on what’s happening in the middle, where the real sore spots reside.”

Daisy Auger-Domínguez
Author, *Inclusion Revolution*

a note from the creators

As we were making a shortlist of ideas and problems to solve as newly credentialed DEI (diversity, equity and inclusion) practitioners, one issue quickly stood out to us as a common struggle at companies across all our industries: **There is a universal need for mid-level managers to lead DEI transformation and not merely take a passive role.**

These middle managers bridge the gap between junior- and mid-level employees, yet they often find it difficult to drive real innovation and change due to changing market forces and workplace demographics, an evolving culture, and the ever-increasing gap between old and new leadership paradigms. (source: centreforglobalinclusion.org) **Increasing DEI ownership from middle managers is imperative, and helping them cultivate their personal value proposition (PVP) is the first and most important step.**

This handbook is intended to guide you as you work to increase ownership from mid-level managers for your company’s DEI initiatives. It includes exercises, worksheets, templates and more — you can use this handbook as an out-of-the-box solution, or you can use it to create your own custom training program. It’s important to note that this handbook assumes there is already robust and active sponsorship for your company’s DEI initiatives from senior-level management. If this is not the case, you may find the approaches in this handbook could be used with your senior management.

This handbook also assumes that your mid-level managers have already been exposed to DEI basics and are aware of the organization’s established goals and business case for DEI. We would highly recommend starting there with your middle managers if you haven’t already.

By empowering these individuals to find their PVP — their “why” for DEI — you will help drive lasting positive change and advance DEI at your company. Good luck — we can’t wait to see what you do!

Sincerely,

Vanessa, Erin, Stan & Jen

why everyone needs a PVP



A **personal value proposition** (PVP), sometimes called an employee value proposition (EVP) or DEI value proposition (DVP), is an individual's highly personal and unique reason — or set of reasons — for valuing diversity, equity and inclusion.



Every manager — from front line managers on the plant floor to the CEO of the company — has a role to play in influencing organizational culture, including DEI.



DEI is an essential core competency for all managers to ensure the organization remains competitive and relevant in the future.



While DEI is senior leadership-led, managers at all levels set the tone for their teams and influence company culture — and when middle managers buy in to DEI, their teams are likely to buy in, too.

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LAYING THE FOUNDATION

establishing your project's vision

Before you dive into helping leaders discover their personal “why,” it’s important to clearly spell out *this project’s* “why” — especially if you’re still seeking approval to move forward. Why is developing one’s PVP a vital behavior within your organization? What does success look like for this project? If (when?) one of your managers raises their hand to ask, “Why are we doing this?” — what’s your answer?

Developing a clear vision for this project that is specific to your organization and its unique needs will not only help you “sell” it to stakeholders — if you do it right, it will help ignite true passion for the project. And passion? It’s infectious.

WRITING A PROJECT VISION STATEMENT

Much like a company’s vision, which spells out the company’s primary objectives and what it stands for, your vision for this project should spell out your primary objectives and tie them back to your company’s core values. Your project vision should be:

- **Clear and concise.** Get to the point in 1 or 2 sentences.
- **Actionable.** Use present tense and strong verbs to convey your commitment.
- **Collaborative.** Solicit input from other people involved in this project.
- **Inspiring.** Make others want to turn your vision into a reality.

Here are a few excellent project vision examples from projecttimes.com that all follow the “[Action] to [deliverable] that [criteria]” formula:

- “Take to market a copier that is small, inexpensive, and reliable enough for personal use on an administrative assistant’s desk.”
- “Design an onboarding program that quickly transforms new employees into valuable long-term contributors.”
- “Prepare a prioritized list of low-cost engineering recommendations that guides the organization to more energy-efficient operations.”

Keeping the above formula in mind, take a stab at writing your project vision statement. Don’t overthink it — you can (and probably will) rewrite this several time before you have it exactly how you want it.

Once you and your team have fine-tuned your unique project vision statement, use it to gain support from top leadership and other stakeholders — and definitely communicate it to your middle managers so they understand exactly what this project aims to achieve.



creating consensus & gathering support

A stakeholder analysis is conducted at the beginning of a project to better understand the need of each stakeholder and their primary requirements. A stakeholder includes any person or group the project will impact, including investors, advisors, sponsors, team members and current or future customers. An effective consensus process (consensus-building) is inclusive and engages all participants. Consensus decisions can lead to better quality outcomes that empower the community to move forward to create their future together.

STEP 1: IDENTIFY KEY STAKEHOLDERS (INTERNAL & EXTERNAL)

By definition, a stakeholder is actively involved in the project, or whose interests may be positively or negatively affected as a result of project execution or successful project completion. (PMI Institute)

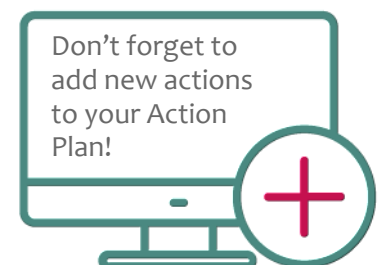
They can be a person, role, organization, company, or system who provides something to the project (input) or receives something from the project (output).

Internal stakeholders are people or groups within the business, such as team members, managers, executives, and so on.

External stakeholders are people or groups outside the business. This includes customers, users, suppliers, and investors.

The stakeholders will vary depending on the type of project and industry, but here are a few examples of the types of stakeholders you might need to consider:

- Change Agent / Project Manager:
 - ◊ Plans, organizes, and manages the project
- Project Sponsor:
 - ◊ Represents the best interest of the organization, provides resources, makes critical business choices (governance)
- Change Targets:
 - ◊ Executives
 - ◊ Senior Management
 - ◊ Middle Managers
 - ◊ Team Members
- Others:
 - ◊ Committees / Groups
 - ◊ Key Contributors
 - ◊ Consultants
 - ◊ Customers
 - ◊ End users



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STEP 2: PRIORITIZE YOUR STAKEHOLDERS

Once you have identified the stakeholders that will be affected or impacted by the project, they will need to be categorized by level of interest and power on a Power/Interest Grid (see Figure 1 below). Some may have the power either to block that work or to advance it. Some may be interested in what you are doing, while others may not have a vested interest at all. You need to understand who you need to prioritize using Stakeholder Mapping (see Figure 2 on page 14) to classify them according to their power over your work and their interest in it.

The position that you allocate to a stakeholder shows you the actions you need to take to engage them:

- **Low Power, Low Interest** (Monitor): Monitor these people, but don't overload them with excessive communication.
- **Low Power, High Interest** (Keep Informed): Adequately inform these people and talk to them to ensure that no major issues are arising. People in this category can often be very helpful with the detail of your project.
- **High Power, Low Interest** (Keep Satisfied): Put enough work in with these people to keep them satisfied, but not so much that they become bored with your message.
- **High Power, High Interest** (Manage Closely): Fully engage these people and make the greatest efforts to satisfy them.

Figure 1: Power/Interest Grid for Stakeholder Prioritization



Adapted from Mendelow, A.L. (1981). 'Environmental Scanning - The Impact of the Stakeholder Concept,' ICIS 1981 Proceedings, 20.

STEP 3: MEASURE / IMPROVE STAKEHOLDER ENGAGEMENT

When running a project with multiple stakeholders, stakeholder engagement will be a major consideration. You will need to continuously measure and gauge stakeholder engagement throughout the life of your project.

Informing/updating stakeholders — Low Power, Low Interest (Monitor)

Your job is to push information to them and keep them informed. Post relevant information for

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them to digest ensure they know how to gain access.

- Social Media Corporate Pages
- Press Release Outlets
- Project blogs and company blogs
- Corporate websites (internal and external)
- Digital newsletters and emails

Consulting stakeholders — Low Power, High Interest (Keep Informed)

Additional consulting resources need to be put into play. You need to demonstrate consideration for their high level of interest regardless of their lack of power.

- Set up online discussion forums for these stakeholders to participate in if they have questions or feel the need to respond to other issues being discussed in the forum. This provides a path for ideation as you deal with important issues.
- Use E-polls and online surveys to gauge their reactions to changes in the projects as announced in the digital media. The responses they provide must be analyzed and catalogued for future reference.
- You'll need to have a keen sense of perception as to when one of these stakeholders is passionate and knowledgeable about an issue. That's when you pull them into your inner circle for the required time to allow them to participate.

Consulting stakeholders — High Power, Low Interest (Keep Satisfied)

These high-power/low-interest stakeholders wield influence, and as a result, you want to shape how that influence is used.

- Share your project issues with them in real-time. Their feedback might be very useful.
- Ask them to review relevant documents in areas that may increase their level of interest. After all, we are always looking for more supporters and champions of the project.
- Begin the process of targeting them with personalized communications rather than just the RSS feed notification of new content being posted. Invite them directly to review postings that may raise their level of interest.
- The concept of “keeping them satisfied” means that not only is perception needed, but you also have to define the role they can play in the project as an advisor, champion, or a provider of funding and services as the need dictates.
- They will want something back for their cooperation. Satisfaction is paramount.

Collaborating with stakeholders — High Power, High Interest (Manage Closely)

These stakeholders are the bread and butter of your engagement. The collaboration process involves the high-power/high-interest stakeholders of your project and you must treat

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them as part of your team.

- Review the project details in real-time. Make it available as a shared file and make sure they are notified every time a change is made.
- Involve them to co-author relevant process documents.
- Invite them to provide guest posts to your project and company blogs. Take it to the next level by developing a list of topics that might be well-suited to the specific interest they have in your project.
- Use them as your pseudo-board of directors for the project team management. Share cost, schedule, and performance concerns with them and get their feedback and suggestions.
- Give them a corporate email tied to your project and make sure they are on the distribution list for important information that will serve as a heads up for pending PR announcements and major project announcements.
- They need to be part of your internal project management communication channels. If you use a project communication tool like Slack, they should be on it. If you are using a formal task management tool, they should be invited to each task list and given work to accomplish as part of the project schedule.

Ideas for Measuring Engagement:

- **Surveys:** Conduct a survey where stakeholders can share feedback anonymously
- **Informal Feedback:** What are your stakeholder's saying outside of formal meetings and during one-on-one conversations
- **Consensus Meeting:** Hold a consensus meeting:
 - ◇ Gather concerns and celebrate successes
 - ◇ Determine what is needed
 - ◇ Discover who is onboard? Who is not?
 - ◇ Who are early adopters or slow rollers? Why?

Ideas for Improving Engagement:

- **Understand Personalities:** Everyone communicates very differently. It's important to learn each stakeholder's personality before and how they prefer communicating, as these relationships develop.
- **Empathy:** You may wonder why a stakeholder has a certain perspective. Why is something that's obvious to you, not obvious to them – and vice versa? This is a great reason to put yourself in their shoes. By doing so, it will also be much easier to communicate with them moving forward.

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STEP 4: LEVERAGE A SPONSOR

A project sponsor is a person or group who owns the project and provides resources and support for the project, program, or portfolio in order to enable its success.

The sponsor's most important job is to ensure that the objectives are clear, and the cost-benefit analyses makes it a good investment of the company's resources:

Responsibilities:

The project sponsor is responsible for many aspects of the project, from initiating and ensuring success to approving and establishing parts of the project. The role can be broken into three parts: vision, governance, and value or benefits realization.

Vision

- Makes sure the business case is valid and in step with the business proposition
- Aligns project with business strategy, goals and objectives
- Stays informed of project events to keep the project viable
- Defines the criteria for project success and how it fits with the overall business

Governance

- Ensures project is properly launched and initiated
- Maintains organizational priorities throughout the project
- Offers support for project organization
- Defines project roles and reporting structure
- Acts as an escalation point for issues when something is beyond the project manager's control
- Gets financial resources
- Decision-maker for progress and phases of the project

Values & Benefits

- Makes sure that risks and changes are managed
- Helps to ensure control and review of processes
- Oversees the delivery of project value
- Evaluate status and progress
- Approves deliverables
- Helps with decision-making
- Responsible for project quality throughout project phases

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Questions to Ask:

- Why is this needed? What is the problem being solved or the opportunity to be seized? How does it support our organizational goals?
- What are the objectives? What will the end result look like?
- What are the benefits? How will life be better when this is complete?
- How will we measure success? What is our baseline? What is our target?
- What areas of the organization will be affected? In what ways?
- Who needs to be involved and how?
- What are the boundaries or scope of the project?
- What are the constraints – in time, in money, in quality?
- What can realistically be achieved within those constraints?
- Roughly, how much will it cost and how long will it take?
- What are the risks? Can they be managed?
- Should we proceed?

STAKEHOLDER MAPPING

Look across stakeholders and categorize them according to key variables (e.g., interest, influence, impact).

WHEN

Conduct this review early in the planning/strategizing process.

WHY

A Stakeholder Map & Matrix provides a clear picture of who stakeholders are and helps determine strategies for engagement.

STAKEHOLDER MAPPING

[illegible]

Figure 2: Stakeholder Mapping

The background is white and filled with various sized circles in red, orange, green, and blue. Many of these circles have a black crescent shape on them, resembling a stylized eye or a planet's ring. The circles are scattered across the entire page, with some overlapping.

CREATING CHANGE

making it personal

WORKSHOP 1: IDENTIFY YOUR “WHY”

Introduction:

True change starts from within. Our first source of influence, then, is about addressing each person’s desire and ability to create a PVP. In terms of desire, it is more a matter of tapping into the innate values and motivations each individual has. Our objective here, then, is connecting to those: how do we make creating a PVP more desirable: how fun, cool, awesome, uplifting, or transformative it is. There are many ways to do this. **Workshop 1** is one suggested method that you can employ to try to create the desire to create a PVP.

Objective:

At the conclusion of this workshop, participants will have identified their own personal, compelling reasons to lead DEI initiatives, and be able to explain to others with authenticity why leading DEI initiatives is important to them.

Required resources:

- Basic application you can use to create a database or list of words
- A live meeting space, either physical or virtual through a platform (Zoom, Teams, etc.)

Optional resources:

- An application that participants can use to select from your list of words. Examples include SharePoint, MS Lists, Magoosh, and dictionary.com
- A video app you can use to create a database of videos related to your list of words, such as YouTube, TikTok, MS Stream, or Vimeo.

Time needed to prepare*: 8-24 work hours, if you are creating your own list or database or words and building your own playlist of videos. 2 hours if you use a pre-created word list and associated videos.

Preparation activities:

1. Build out a list or database of words that represent positive personal principles or values. Examples include “empathy”, “fairness”, “excellence”, “decency”, “learning”, etc.
2. For each word in your list, find several short (max 30-60 seconds in length) videos that give a compelling explanation or illustration of the word. Videos of well-known, influential people could be particularly effective.
3. (Optional) As pre-work, have the participants submit the top two reasons they want to work here. Share some possible examples, such as making a good living, advancing in their career, doing rewarding work, becoming a master/leader in their field, being part of a great team, etc. Divide them into small sub-groups of 3-6 people each according to one of their top reasons.

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WORKSHOP 1: IDENTIFY YOUR “WHY”

Agenda:

- I. Introduction (5 minutes)
- II. Word search: personal values (10 minutes)
- III. Identify your purpose: why you want to work here (5 minutes)
- IV. Breakout: how does DEI help you achieve your purpose (30 minutes)
- V. Conclusion & looking forward to Workshop 2 (5 minutes)

Facilitation

Introduction:

- Introduce yourself and thank the participants for joining.
- Review any safety tips (more applicable for an in-person session), code of conduct, or ground rules (cameras on, for example) for the Workshop, as appropriate.
- Share the objective of the Workshop (see previous page).
- Explain that this is a Workshop—participants can expect that they will be actively engaged.
- Have participants introduce themselves and share what they hope to get out of the Workshop. Capture this on a (real or virtual) whiteboard or flipchart, or in the meeting chat if it is virtual.

Word Search: Personal Values

- Direct participants to the list of words.
- Instruct them to choose 2-3 of the words that represent their strongest or most important personal values or principles they live by.
- Instruct them to watch the videos associated with those words.

Identify Your Purpose

- Instruct participants to write down or think of the top two reasons they want to work here. Share some possible examples, such as making a good living, advancing in their career, doing rewarding work, becoming a master/leader in their field, being part of a great team, etc.
- Instruct participants to reflect on any connections or alignment between their personal values and the reasons they want to work here.

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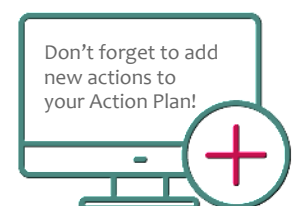
WORKSHOP 1: IDENTIFY YOUR “WHY”

Breakout: How does DEI help you achieve your purpose?

- Separate the group into breakouts based on the most important purpose chosen above.
- (Optional) You may want to assign a discussion facilitator to each breakout group. The breakout facilitators would ask open-ended questions to get the conversation started or keep it going. They can even ask specific people to share with their group mates.
- Instruct the breakout groups to discuss with each other how DEI helps them achieve that purpose. Instruct them that before they re-join the larger group they should select a spokesperson to report out to the larger group. During the report-out, the spokespersons will share any shared themes that came up during the discussion and any noteworthy or interesting points that were brought out. They should be encouraged to share if they were particularly inspired by their group mates.
- Sub-teams then come back together to report out to the larger group.
- Instruct participants to ensure they have captured notes on their values, purpose, and connection to DEI.

Conclusion & looking forward to Workshop 2

- Refer back to the Objective of the Workshop. Then refer back to your notes on what each participant hoped to get out of the Workshop.
- Ask for feedback from the participants if they feel their expectations were fulfilled, and any comments or reflections on the Workshop.
- Share the Objective of Workshop 2: participants will be learning how to create a PVP for DEI. Ask participants how they feel this Workshop may relate to Workshop 2.
- Thank them for their participation and end the session.



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WORKSHOP 2A: CREATE YOUR PERSONAL VALUE PROPOSITION

Introduction:

We also need to teach individual middle managers how to create a PVP. The best learning solutions should involve hands-on practice in an environment that simulates the real world as closely as possible. In other words, the PVP has to be practiced in an environment that is highly similar, if not identical, to the individual's daily work environment. The learning should also be provided in segments that can be readily absorbed, ideally in short, intense sessions. Learners should also receive immediate feedback and be given time to reflect on what they have learned to gain confidence they are successfully applying their new knowledge and skill. **Workshop 2** below is one potential learning design you can use to achieve the learning objective of middle managers gaining the ability to create a PVP. At the conclusion of this workshop—broken into parts, 2A and 2B—participants will even have a completed PVP that they have put into practice in the workplace and gained a cycle of experiential learning with.

Objective:

At the conclusion of this workshop, participants will have drafted their initial PVP.

Required resources:

- A live meeting space, either physical or virtual through a platform (Zoom, Teams, etc.)

Optional resources:

- An application where participants can draft/save/share their PVP, and change leaders can oversee the process and view individual PVPs for coaching opportunities. Examples include SharePoint, MS Teams, and Slack, and human capital management systems such as Workday, Oracle, and SuccessFactors.

Time needed to prepare*:

4 work hours, if you are creating PVP examples from scratch. One work hour if you have real examples you can pull from.

Preparation activities:

Accumulate example PVP's and their usage to share with participants. Build out examples of PVP's, if necessary. Instruct participants to bring their notes from WS1.

Agenda:

- I. Introduction (5 minutes)
- II. Review examples and create first draft (15 minutes)
- III. Breakout: share and get feedback (15 minutes)

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WORKSHOP 2A: CREATE YOUR PERSONAL VALUE PROPOSITION

- IV. Review examples of PVP usage (5 minutes)
- V. Breakout: discuss how you can use your PVP (15 minutes)
- VI. Conclusion & looking forward to Workshop 2B (5 minutes)

Facilitation

Introduction:

- Introduce yourself and thank the participants for joining.
- Review any safety tips (more applicable for an in-person session), code of conduct, or ground rules (cameras on, for example) for the Workshop, as appropriate.
- Share the objective of the Workshop (see previous page).
- Explain that this is a Workshop—participants can expect that they will be actively engaged.
- Have participants introduce themselves and share what they hope to get out of the Workshop. Capture this on a (real or virtual) whiteboard or flipchart, or in the meeting chat if it is virtual.

Review examples and create first draft

- Share examples of PVP's. Review two or three of them with the participants.
- Instruct participants to review their notes from Workshop 1. Ask them to review these for insights they can use to create their own draft PVP.
- Instruct participants to draft their PVP.

Breakout: share and get feedback

- Instruct participants that they will be sharing their PVPs with each other. Group mates will give each other positive affirmations. They may ask clarifying questions but should refrain from suggestions or critiques (even if intent is positive). Remind participants these are Personal Value Propositions.
- Separate group into breakouts to complete the activity.

Review examples of PVP usage

- Provide participants with examples of when/how a PVP could be leveraged in various DEI activities/projects/actions. For example, as a leader you've been asked to develop an action plan for your team to improve how much team members feel included in the team. Examples should refer to those activities currently underway or about to be launched.
- Review several examples with the participants. Ask if anyone has questions.

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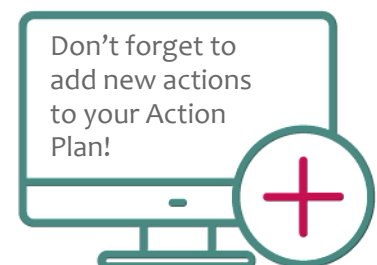
WORKSHOP 2A: CREATE YOUR PERSONAL VALUE PROPOSITION

Breakout: discuss how you can use your PVP

- Instruct participants that they will be discussing with each other specific, real-world opportunities they will have to leverage their PVP in various DEI activities/projects/actions they are or will be leading or involved with in the next 90 days.

Conclusion & looking forward to Workshop 2B

- Refer back to the Objective of the Workshop. Then refer back to your notes on what each participant hoped to get out of the Workshop.
- Ask for feedback from the participants if they feel their expectations were fulfilled, and any comments or reflections on the Workshop.
- Share the Objective of Workshop 2B: participants will come back together 90 days later and discuss how they've applied their PVP. What's worked well, what have been some of the challenges. Participants will have the opportunity to offer each other suggestions and/or encouragement for the challenges.
- Ask participants what, if any, difficulties they foresee in being able to use their PVP in the next 90 days.
- Thank them for their participation and end the session.



making it personal

WORKSHOP 2B: REFLECTION — APPLYING YOUR PVP

Objective:

At the conclusion of this workshop, participants will be able to summarize what has worked well with recent application of their PVP. They will also have identified opportunities to improve their PVP, if desired, as well as opportunities for further application in the near term.

Required resources:

A live meeting space, either physical or virtual through a platform (Zoom, Teams, etc.)

Optional resources:

An application where participants can draft/save/share their PVP, and change leaders can oversee the process and view individual PVPs for coaching opportunities. Examples include SharePoint, MS Teams, and Slack, and human capital management systems such as Workday, Oracle, and SuccessFactors.

Preparation activities:

Instruct participants to bring their PVPs and notes on what has worked well and what opportunities may exist to improve in the future.

Agenda:

- I. Introduction (5 minutes)
- II. Breakout: share and get feedback (50 minutes)
- III. Conclusion & looking forward (5 minutes)

Facilitation

Introduction:

- Introduce yourself and thank the participants for joining.
- Review any safety tips (more applicable for an in-person session), code of conduct, or ground rules (cameras on, for example) for the Workshop, as appropriate.
- Share the objective of the Workshop (see previous page).
- Explain that this is a Workshop—participants can expect that they will be actively engaged.
- Have participants introduce themselves and share what they hope to get out of the Workshop. Capture this on a (real or virtual) whiteboard or flipchart, or in the meeting chat if it is virtual.

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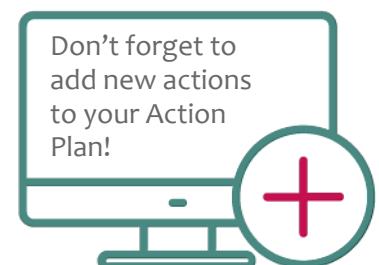
WORKSHOP 2B: REFLECTION — APPLYING YOUR PVP

Breakout: share and get feedback

- Instruct participants that they will be sharing their experiences using their PVPs with each other. Topics should include what's worked well, and what some of the challenges have been. Group mates can and should offer each other suggestions and/or encouragement for the challenges.
- Instruct participants that they will have 30 minutes to complete the activity and will then return to the large group for report-out. Instruct them that they should identify a spokesperson who to report out to the larger group. During the report-out, the spokespersons will share any experiences where participants have encountered similar, notable challenges. They should also highlight any successes they find to be particularly insightful or inspiring for the large group to learn and/or gain encouragement from.
- Separate group into breakouts to complete the activity.
- (Optional) You may want to assign a discussion facilitator to each breakout group. The breakout facilitators would ask open-ended questions to get the conversation started or keep it going. They can even ask specific people to share with their group mates.
- Bring the teams back together for report-out.

Conclusion & looking forward

- Refer back to the Objective of the Workshop. Then refer back to your notes on what each participant hoped to get out of the Workshop.
- Ask for feedback from the participants if they feel their expectations were fulfilled, and any comments or reflections on the Workshop.
- Ask participants what, if any, difficulties they foresee in being able to use their PVP going forward.
- Thank them for their participation and end the session.



collaborating and reinforcing

PEER REINFORCEMENT

Peer reinforcement is a powerful tool to use when cultivating a personal value proposition. For peer reinforcement to be effective it is crucial to create a safe and open environment. This environment will allow for practicing new behaviors, giving and receiving constructive feedback, and holding others and one's self accountable. It is beneficial to reinforce preferred behaviors using spotlights, awards, and other recognition to create a positive association.

Employee Spotlights. Choose an employee to highlight who will share their PVP and actions they take (use social media platform, newsletter, videos, etc.).

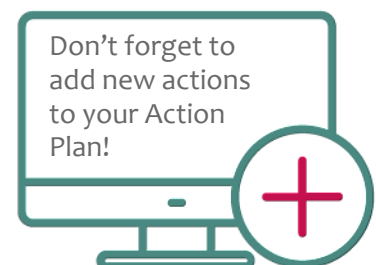
Awards and Recognition. Implement a rewards, awards, and recognition program (managers motivate employees with rewards of monetary value, small gifts, etc.).

Peer-to-Peer Recognition. A platform for employees to recognize each other for these behaviors. (stars to fill out and give to employee, bulletin board to display, etc.).

COLLABORATION

Collaborating and sharing your PVP can have a powerful influence on your team, direct reports, and peers. It is recommended that leaders share their PVP on the platforms available to them. Sharing a PVP takes vulnerability, but also allows others to come along on the journey. You will be able to build relationships and get feedback on your progress by sharing this with others. Sharing your PVP with others can also benefit you by receiving valuable feedback from others. Those creating PVP and working to evolve and grow need to acquire information from others on their progress.

1. Leadership team shares PVP via video messaging, in person roundtables for discussion (team workshop creating PVP)
2. One-on-One discussions with direct reports to give feedback on inclusive behaviors and PVP
3. Share PVP with team (review progress)
4. Get 360° feedback or reviews



incentivizing and equipping

In addition to their own skill and intrinsic motivation, as well as leveraging their peer leaders, middle managers will be more likely to create and use a Personal Value Proposition if we create an environment conducive to doing so. Creating this environment should involve setting up the proper incentive structure to create and use a PVP and also providing resources that make it as easy as possible.

INCENTIVES

The intent here is to create rewards for middle managers who successfully use their PVPs, and/or deterrents for those who don't. Some examples of incentives are:

- Cascading an individual performance goal, as part of the formal performance management process, to every middle manager. In other words, their individual performance—and therefore, in many cases, their compensation rewards—will be assessed partially on whether or not they create and use a PVP.
- Highlight specific middle managers who are successfully using their PVP in all-hands, “town hall” meetings.
- Give a special award each quarter or year for the middle manager(s) who demonstrate the greatest leadership of a DEI initiative, and highlight how the PVP was instrumental in them reaching this achievement. Such an award could, but does not have to be monetary.
- The President/CEO sends a personalized note of appreciation and encouragement about how their use of a PVP is benefitting the organization.
- Give them a Friday afternoon off.
- Send a basket of their favorite snacks or give them a gift certificate to their favorite restaurant.
- Recognize them in a team meeting.

Don't like any of these ideas? No problem! The book, *1501 Ways To Reward Employees*, by Bob Nelson, has many great ideas on incentives you can set up, including hundreds that do not involve a monetary reward. Or you can get tons of great ideas by using an internet search engine like Google or Bing.

Whatever the idea, there are a few principles to follow. First, any incentive you employ must be focused on the behavior of using a PVP. If it is applied to DEI metric achievement or some other aspect, you may unintentionally dis-incentivize managers from doing so. After all, if they can gain rewards despite not having created or used a PVP, why should or would they do it?

incentivizing and equipping

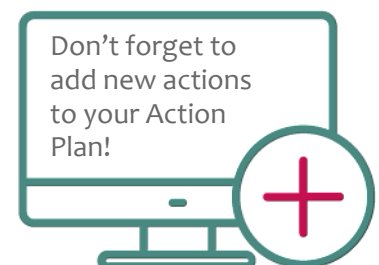
Second, direct monetary rewards should be used with caution. If they are too large or too widespread, you can create a quid pro quo environment around using a PVP. The result here is that if you don't continue issuing the reward instrument the behavior of using a PVP stops. This may eventually be OK if and when middle managers leading DEI efforts becomes ingrained in the culture. Early on, you will want to establish the underlying motivations for using a PVP and not have the sole incentive being a monetary reward. Monetary rewards can also result in a competitive, I win/you lose environment. Worst case, they can incentivize people taking shortcuts or cheating just to get the reward.

Finally, while you can employ negative consequences as a way to dis-incentivize middle managers from not using a PVP, this should be done only when necessary. One possible instance where this might be necessary is where a middle manager is not driving DEI in their department or team as is expected, and when exploring why not you discover they haven't created or been using a PVP.

RESOURCES

Making it easier for middle managers to create and use a PVP will increase the likelihood they will do it. Some examples of resources are:

- Examples (as highlighted in the Workshops outlined in the “Making It Personal” section of this handbook)
- Templates (you can find an example template on the next page)
- Job aids
- Placement within their world of work; in other words, do they have to struggle where to find any of the above items, or are they one or two clicks away within whatever systems they're in all the time? This could be your organization's collaboration platform, MS Teams, Slack, Google Hangouts, Yammer, or similar.



MY PERSONAL VALUE PROPOSITION FOR DEI

My core values are:

My reasons for being in this organization are:

DEI reflects my values and supports my reasons for being here in the following ways:

I will use this value proposition in the following ways/at the following times:

The background is white and filled with various sized circles in red, orange, green, and blue. Many of these circles have a black crescent shape on them, resembling a ring or a partial circle. The circles are scattered across the entire page, with some overlapping. In the center, there is a dark teal rectangular box with a thin white border. Inside this box, the text "MANAGING CHANGE" is written in white, uppercase, sans-serif font. The text is centered horizontally and vertically within the box, and is flanked by two thin white horizontal lines, one above and one below the text.

MANAGING CHANGE

creating an action plan to track progress

An action plan is a detailed list of the a list of tasks that you need to do to complete a project or objective. If you've been adding items to the action plan on the next page as you've been making your way through this handbook, congratulations — you're well on your way to managing change and meeting your goals!

For more action plan templates and deliverables, visit www.pmi.org.



ACTION PLAN

VISION:

[illegible]