



# LEGISLATIVE & WORKING GROUPS SUMMIT | WASHINGTON, DC FEBRUARY 8-11, 2016

## HR in Insurance Working Group

### EXECUTIVE SUMMARY

The Council's Human Resources in Insurance Working Group met during the Legislative & Working Group Summit February 8-9, 2016, at The Mandarin Oriental Hotel in Washington, DC. The meeting was staffed by The Council's Elizabeth McDaid, Julia Smith and Brittany Foye. Of the 20 participants, three were first-time attendees or from new CIAB member firms and 17 were returning participants, underscoring the value of peer-to-peer exchange. The agenda focused on understanding and developing strategies for inclusivity and diversity initiatives.

### PARTICIPATING FIRMS

Assurance Agency, Ltd.  
BancorpSouth Insurance Services  
BMS Intermediaries, Inc.  
Brown & Brown, Inc.  
CBIZ Insurance Services, Inc.  
Crawford Advisors, LLC  
Digital Insurance, Inc.  
Gehring Group, Inc.  
Heffernan Group

Hylant  
Keenan  
Kelly & Associates Insurance Group Inc.  
Murray Securus  
NFP  
Oswald Companies  
RCM&D, Inc.  
TrueNorth Companies

### INTRODUCTIONS....

McDaid opened the session with an ice-breaker activity. Each participant went around the table and introduced themselves, their role, firm's size and location. Participants then used Visual Explorer, an imagery tool from the Center for Creative Leadership, to help display how sophisticated each firm's diversity and inclusivity programs are.

### INDUSTRY DIVERSITY STUDY – PRELIMINARY RESULTS

*Presented by Josh Bewlay, McLagan*

Bewlay kicked off the diversity and inclusivity discussion by presenting preliminary data and trends on the industry's current statistics. The preliminary results of the study exposed three areas of concern:

- Aging workforce
- Gender inequality at the C-Suite/Board level
- Lack of ethnic diversity

The survey is still open for participation. If interested, please contact Josh Bewlay at [joshua.bewlay@mclagan.com](mailto:joshua.bewlay@mclagan.com). Only participating firms will receive the results.

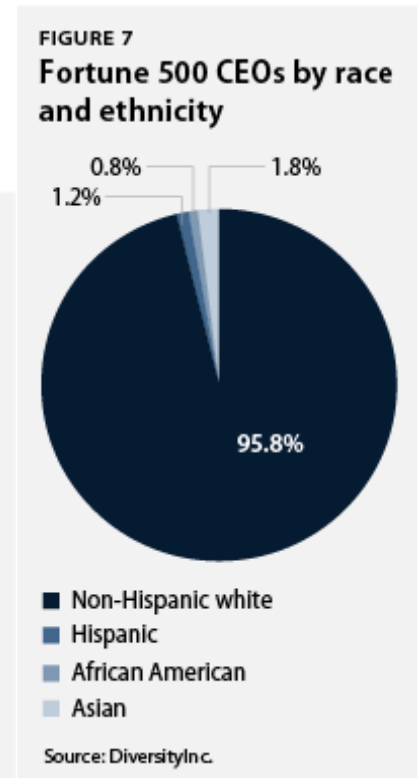
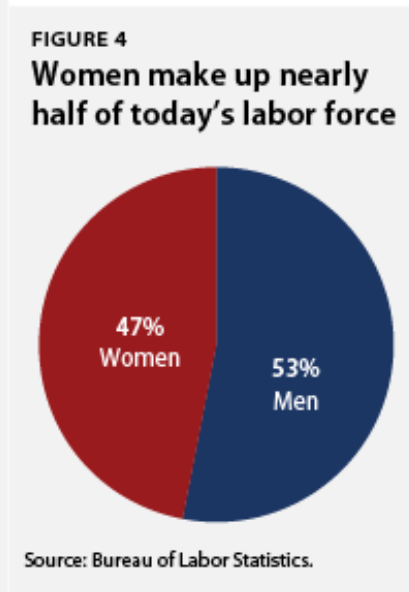
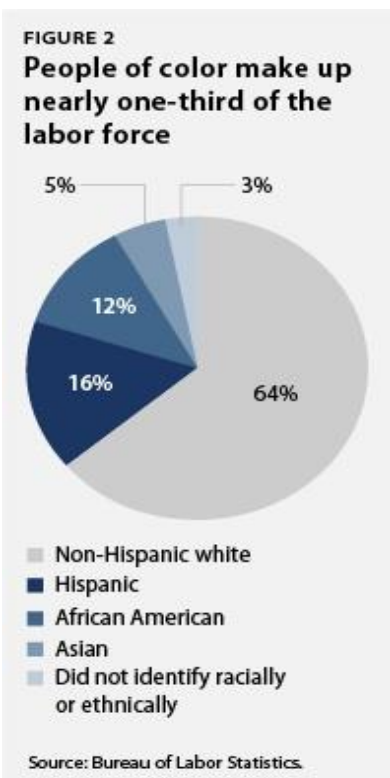
## STRATEGIES FOR INCLUSION - MOVING BEYOND DIVERSITY TO THE NEXT LEVEL OF PERFORMANCE

Presented by Natalie Holder, Founder of Quest Diversity

The session continued with Natalie Holder, founder of Quest Diversity, focusing on the differences between diversity and inclusion, the benefits of connecting diversity to business objectives and strategies for implementation. Holder identified the top 10 barriers to inclusion in today's workplace and explained how micro-inequities and implicit bias inadvertently silence and erode the confidence of rising leaders.

### Why are we still talking about diversity?

Holder shared these statistics to help set the stage:



### Benefits of Connecting Diversity to Business Objectives

- Expanded market place for recruitment
- Relatability to broader client base
- Diversity of thought, specifically in team-based selling

### Diversity vs. Inclusion

The difference between diversity and inclusion is engagement. Being invited is much different than being invited to participate.

### Top 10 Barriers to Inclusion

- Informal Mentoring
- Mistakes
- Bullying
- Perceived Underperformance
- Insensitivity
- Quality Work Assignments
- Dual Identity
- Assumption
- Being the First
- Invisibility

Holder suggests interrupting these barriers by acknowledging, recognizing, and exposing these barriers and soliciting feedback.

**Strategies for Implementation**

**Recruitment:**

- Panel Interviews
- Maximizing Employee Resource Groups
- Professional Diversity

**Retention & Promotion:**

- Climate survey
- Professional trade associations
- Employee resources groups
- Succession planning panels

**ROUNDTABLE DISCUSSIONS**

The meeting concluded with a collaborative discussion on individual issues including response procedures to work place violence/active shooter emergencies, unlimited leave policies, women in leadership programs, and remote working policies.

**NEXT MEETING**

The next Human Resources in Insurance Working Group is set to take place September 22-23, at The Council’s offices in Washington D.C.

**QUESTIONS?**

Contact Elizabeth McDaid at [elizabeth.mcdaid@ciab.com](mailto:elizabeth.mcdaid@ciab.com).



The group’s Visual Explorer finished product.