



THE COUNCIL Diversity, Equity, & Inclusion Charter

Diversity, Equity, & Inclusion Charter

This Charter serves as a strategic guide for the Council of Insurance Agents and Brokers (The Council) in its pursuit of its diversity, equity, and inclusion (DE&I) goals. The principles of diversity, equity, and inclusion are highly regarded as core institutional values for The Council and shall remain as such.

1. Background

The Council is committed to the values of diversity, equity, and inclusion. We believe in building healthy and safe environments, free of the barriers and constraints that prevent our members from realizing their full potential.

Additionally, we recognize that leading with equity and inclusion helps build forward-thinking spaces where all members are respected and valued for their lived experiences and contributions. Our approach to inclusion is fundamental in channeling the ideas and perspectives that allow The Council to be a leader in providing innovative services for the insurance brokerage workforce.

The Council recognizes that diversity, equity, and inclusion (DE&I) are core organizational values and are an integral part of our operations. And as such, it is The Council's intent to seek means to not only break down barriers to advancement, but also celebrate individuals for their group identity. In the spirit of collective growth, the Council is committed to ensuring that all members are engaged in The Council's goal of providing quality DE&I content that is timely, accessible, and relevant.

The Council encourages all members to sign the DE&I Pledge and uphold the values of diversity, equity, and inclusion at all events, programs, activities, webinars, and other activities.

2. EEO Statement

The Council does not discriminate on the basis of race, creed, color, age, gender, gender identity, ethnicity, cultural heritage & religion, national origin, sexual orientation, class or socio-economic status, disability status, neurodivergence, veteran status, family status, political affiliation, or any other identifier of group identity.

3. Definitions

Diversity, equity, and inclusion are evolving terms that we believe when properly defined will help guide The Council in our drive to improve our member relations. The Council defines diversity, equity, and inclusion as follows:

Diversity. Diversity refers to demographic representation, with a sharpened focus on underrepresented groups, as well as the different personal characteristics,

viewpoints, perspectives, cultures, experiences, and talents that each member brings to the organization.

Equity. Equity is an approach that ensures everyone has access to fairer outcomes by acknowledging that we don't all start from the same place and continuing to correct and address that imbalance.

Inclusion. Inclusion is the engagement and celebration of each individual and collectively creating an environment where every member feels respected, valued, and included in the organization's mission.

These definitions will be updated periodically when needed based on current DE&I trends and new information.

4. Mission

The Council views DE&I as an organizational imperative. Our DE&I mission is as follows:

The Council is committed to fostering inclusive spaces where all members can contribute to effective strategies that promote innovation and achieve fairer outcomes for our diverse insurance workforce.

5. Values

We believe that establishing DE&I as core strengths and values are necessary to ensure our commitments remain viable. The Council believes in upholding the following values:

Good Faith Dialogue. The Council is committed to creating spaces for open, honest, and brave conversations with the aim of sharing experiences and new perspectives. We encourage our members to view each Council event and activity as a place of learning. To do so, we hope that all members will enter conversations with good intentions, but recognize that they must also own the impact of their words. Therefore, the following guidelines should be used for effective dialogue:

- Speak from your own personal experiences and use I statements,
- Take responsibility for your own learning,
- Recognize and validate each person's truths,
- Listen to learn, not to argue,
- Make space for those who are underrepresented, and
- Ensure confidentiality of experiences and use the knowledge gained to encourage, develop, and retain talent.

Accountability. At the Council, we believe that mechanisms to hold ourselves accountable to our DE&I goals are important to ensure that they remain top of mind. We believe in taking ownership and accepting responsibility for our past and future decisions and initiatives.

Partnership. The Council is continuously seeking new partnerships with groups and organizations that will better enrich our relationship with our clients and meet their needs.

Innovation. We believe that equity and inclusion are necessary components to creating forward-thinking and innovative cultures. Research shows that the most innovative organizations are those that embrace the values of DE&I and psychological safety and so we continually advocate for new and innovative approaches to serving member needs.

Objectivity. While we do recognize that all decisions will always be based on the subjective knowledge and experience of those who make them, we believe that we can draw closer to better, more objective decision-making by democratizing our processes and allowing for diverse perspectives to flourish.

6. Objectives

To meet our DE&I values, The Council aims to support members' efforts and DE&I efforts by pursuing the following goals:

Diversity

- Invite a diverse array of speakers and guests to our programs.
- Promote diversity in member committee leadership.
- Support member firms in their efforts to recruit and retain talent from all identity groups and lived experiences.

Inclusion

- Further foster an environment of psychological safety and inclusion where all members feel welcome and belong.
- Create spaces to facilitate dialogue on difficult subjects and provide avenues for learning and growth from one another.
- Review all communications to ensure that they meet our standards for inclusivity.

Equity

- Develop programming that addresses inequities in the insurance workforce for members.

7. Committee

The Council will establish a DE&I Advisory committee to guide our efforts and hold us accountable for the following deliverables:

- **Education** to provide new perspectives and opportunities for The Council community to learn how to create, foster, and lead diversity, equity & inclusivity efforts within their organizations.
- **Partnerships** to drive collaboration where there is alignment with The Council's DE&I mission and efforts.
- **Measurement** to create accountability of industry standards and benchmarking data that can be used as a mechanism for members to measure efficacy of their ongoing DE&I programs year over year.