



# Workplace Inclusion Pilot Fulfills Branch Needs with Neuro-Diverse Employees



## OVERVIEW

Vancity knows that hiring a diverse workforce is not only the right thing to do, but it makes good business sense. Vancity has experienced the positive effects on their business by hiring individuals with disabilities. One of the projects that Vancity has undertaken is the Workplace Inclusion pilot that focused on hiring neuro-diverse individuals\* in their branches to provide administrative support.

Vancity wanted to relieve their branch staff from administrative responsibilities so they could focus more on customer care. To meet this need, they hired neuro-diverse individuals, many of them on the autism spectrum, to be responsible for administrative duties. This also provided a talent pipeline for the branch when roles became vacant. Out of the 22 individuals Vancity hired as part of the pilot, 21 have stayed with Vancity.

## OBJECTIVES

The Workplace Inclusion (WIN) pilot was designed to fulfill five main objectives:

- Relieve administrative burden from the Branch Account Managers and Financial Services Representatives – to allow them to focus on their main responsibility – customer care.
- Group together similar responsibilities to create a position that required a specialized skill set.
- Provide meaningful employment opportunities for neuro-diverse individuals.
- Create a better understanding for staff about persons with disabilities and increase comfort levels within all staff about engaging with diverse individuals.
- Build a pipeline for future vacancies as the branches often experience career progression within their employee base.

\*Neurodiverse: Neurodiversity, short for neurological diversity, refers to the diversity of human brains and minds, and to the idea that this is a natural, valuable form of diversity.

## APPROACH

The WIN pilot took place in early 2016, in an intentional effort to ensure the Branch Account Managers and Financial Services Representatives were focusing on customer care by shifting administrative responsibilities off their plates. The approach for this pilot included:

- Creating the position by understanding branch needs.
- Getting the support of senior leaders, managers and HR.
- Obtaining budget approval for the creation of a new position.
- Orientation and training for managers.
- Developing a relationship with a subject matter expert – a Disability Service Organization.
- Identifying candidate and hiring.
- Replicating the pilot in other branches.

### Creating the Positions

It was really important to understand the branch's needs to ensure that the job that was created would alleviate the necessary pieces of the Branch Account Manager and Financial Services Representatives roles, to allow them to focus on customer care and being trusted customer advisors. It was deemed that what was needed was an administrative support person, who would work part time, and fulfill the administrative responsibilities that were being done off the side of the Branch Account Managers and Financial Services Representatives' desks. The role outline was decided on based on collective needs. However, each branch customized the role slightly to suit their needs, and this was done in partnership with the Diversity and Inclusion Consultant.

### Getting Support

Once it was determined what roles were needed, the proposal was taken to the Executive Leadership Team for approval. It was critical to get their buy in first, but also to ensure that Human Resources and Branch Managers were onboard, and felt supported in the roll out of this pilot.

### Budget Approval

As a new position was being created, it was necessary to demonstrate the business case and how this new position would alleviate responsibilities from front-facing staff. Ultimately, if the Branch Account Managers and Financial Services Representatives could continue to be focused on the customer, Vancity would benefit from increased customer interaction. The budget for this initial pilot was centrally funded, but on an ongoing basis will be part of the branches' staff budgets.

### Orientation and Training

To ensure that managers were onboard and felt supported in hiring and engaging employees, they were asked to come to a two-hour launch event that gave them an overview of the pilot, and created a space for them to ask questions about working with persons with disabilities, that they may not have felt comfortable asking in other settings. The supportive, open environment for this discussion was critical to the success of the pilot, as managers needed the space to address any concerns or reservations they might have. Managers also had the opportunity to hear from their peers who had already successfully hired and engaged persons of disabilities on their staff teams. This was a critical piece in securing buy-in.

### Relationships with Disability Service Organizations

Branches were encouraged to work with organizations that they already had an existing relationship with. However, for branches that may not have had an existing relationship with a community partner who could help identify candidates, Vancity had a list of recommended options including, but not limited to: Open Door Group and posAbilities. Each branch asked the disability service organization to provide two or three resumes of qualified candidates. This gave each branch a select few qualified applicants to choose from.

### Identifying Candidates and Hiring

As Vancity wanted to be intentional in their hiring of persons with disabilities for this job opening, they did not post this role publicly, but rather worked with disability service organizations to find suited candidates.

The interviews were conducted slightly differently than traditional branch interviews. The applicants were invited in person for a conversation (rather than the traditional behavioural interview). Following the conversation, they had an opportunity for a “working interview” – which allowed them to shadow and demonstrate the skills required for the job. This allowed Vancity to assess whether the candidate could do the job, in a way that allowed the candidate to demonstrate their skills.

### Replicating Pilot

Two prototype branches and head office tested hiring three neuro-diverse individuals into administrative support roles. Following this initial testing, twenty two additional branches participated in the program. This was significant from two perspectives.

One, the initial ask for participation was to fifteen branches – and the overwhelming response was a positive sign of buy in.

Second, it meant that a good majority of branches had integrated this program into their hiring practices (over 40%).

## OUTCOMES

As a result of the program, the outcomes that Vancity has seen are numerous. One of the key highlights is that employees have shared that their understanding of persons with disabilities has increased, and internal perceptions have shifted to focus on ability – what this person can do, instead of disability – what this person cannot do. This has led to increased comfort with all staff in engaging with a diversity of individuals.

From the branch perspective, having these individuals relieve administrative burden has allowed the Branch Account Managers and Financial Services Representatives to stay focused on serving clients and providing excellent customer service. The addition of a diverse team member has also had a sited positive impact on morale and connection within the team.

This pilot is also tied to Vancity's values of being an inclusive employer – as they firmly believe that employment is the gateway to both financial and social inclusion.

Out of the 22 individuals Vancity hired in the pilot, 21 have stayed on with Vancity, and one left to go back to school in the fall.

## LESSONS LEARNED

Vancity learned a great deal from this pilot, which will help them in all their hiring going forward. Some of those lessons are detailed below:

### Be Patient

Vancity learned to be both patient and empathetic about the journey they were on. As this was one of the organization's first step towards inclusive hiring, people had questions and reservations about engaging with individuals of disabilities.

It is important to help employees through this process, to secure buy in and ensure comfort levels are established. Sometimes this means that there will be a balance between keeping the project on a timeline and ensuring that it is executed well.

### Give Good Context

Vancity learned that explaining the "why" was a big part of setting their managers up for success. It was important for them to ensure their managers understood the project, were able to ask questions and have their concerns addressed.

### Anticipate Challenges

When planning for this program, Vancity took some time to understand what potential challenges might be. This allowed them to be realistic about what they might encounter internally along the way, and ensure that they were ready to



mitigate any potential challenges and concerns. Vancity knew that any change in a process or environment can cause discomfort, and this was no different.

### **Peer to Peer Support**

One of Vancity's greatest learnings was that peers learn best from each other. Since two branches had tested neuro-diverse hiring prior to this program's launch – they utilized the experience of these two branches to talk about the program. Branch managers were much more likely to buy in to their peer's experience.

### **Work with Great Community Partners**

Vancity recognized that they are not experts in disability hiring. They really relied on community partners - disability service organizations - to support them in their hiring. One of the keys to choosing the right community partner was finding one with a good employment program. Developing these relationships and ensuring they remained strong was key to success. Two of their main partners were Open Door Group and posAbilities, but they worked with a variety of partners, depending on where branches had existing partnerships.

### **Don't Be Afraid to Try New Things**

Vancity knew that this program was an opportunity for them to innovate and do things differently. They utilized this program to try new things in relation to recruitment and hiring. As an example, they tried a new interview process that they hadn't used in the past. Trying new things allowed them to see what worked, and what didn't, and helped deconstruct existing processes to understand both bias and where there might be a better, different way to do something.

### **NEXT STEPS**

Out of the 22 individuals that Vancity hired, 21 of them have stayed with the organization. The retention of these individuals and their career growth are two important metrics for Vancity as they consider next steps. To end the pilot phase, they are circling back with key teams (talent, regional directors, etc) to report on the results of the initial pilot, and assess appetite and resources to take the pilot to other branches. The 22 branches that have engaged in this will continue to have these positions open as the candidates fill them move on to other roles. These positions will be filled whenever vacant as they have now become permanent roles. Vancity is also finishing a study of the pilot with SFU to learn as much as they can from the initial implementation.