



**Canadian Centre for Diversity and Inclusion**  
**Centre canadien pour la diversité et l'inclusion**

# Success stories

**TD Bank Group**

**A Canadian case study in diversity and inclusion**

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## **TD Bank Group: A Canadian success story in diversity and inclusion**

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Thanks to Ron Puccini, Senior Manager Diversity and Inclusion, Corporate Human Resources at TD Bank Group.

# Leadership as a champion of LGBTQA engagement

In large urban centres like Vancouver, Toronto and Montreal, Pride parades have become major festivals with multi-million dollar sponsorship budgets as mainstream brands have connected with the LGBT community. Pride – and being out at work – has grown. Back in 2005, five bank employees were regularly getting together socially in downtown Toronto to talk about being out at work, and what it meant to identify as gay at work.

This was how TD's first LGBTQA groups started. Hearing Ron Puccini, Senior Manager of Corporate Diversity and Inclusion, and lead on the LGBTQA Area of Focus talk about creating pride for LGBT employees coming out at work is a reminder of what Pride stands for. While coming out at work has always been challenging, TD employees now have resource groups, events and a nation-wide online community within the bank that supports people managing this transition, and helps those outside the community understand some of the issues faced by people identifying as LGBT.

Ron is one of the founders of TD's Pride Network; in the four years that he has been leading LGBTQA diversity and inclusion with TD Bank Group, he has seen diversity planning for LGBT customers and employees grow from that small group to be embedded in the bank's business. When we interviewed him for this case study, he explained how diversity has become part of the bank's processes and culture, changing the way it recognizes how people identify to better connect with customers and employees. This case study examines how the bank has addressed this strand of their diversity strategy from its beginning and what has contributed to its success.

## **It starts with authentic conversations**

In 2005, at the same time as Ron and others were talking about what it meant to be out at work and the connection of social identity and career, the bank's President and CEO at the time, Ed Clark,

had a strong social agenda and sent a question to the people in Human Resources asking how many employees had signed up for same-sex benefits. Given that the benefits had been available to employees since 1994, the answer was **shockingly few**. This was one of the first steps the bank took in building a corporate initiative to make diversity part of their business strategy. The Diversity Leadership Council was formed and at the same time, the bank's first Pride network was created. Soon after that, the bank sponsored its first Pride parade in Toronto, a bold message at the time.

For context, it's useful to remember that even in 2005, it was remarkable for a corporate Bay Street leader to champion diversity internally and publicly. The message was affirming for employees and customers identifying as LGBT and their allies. Ed Clark didn't shy away from acknowledging that people were offended that the bank supported the LGBT community and engaged in conversations to help them understand why he felt it mattered and actively promoted inclusion to change mindsets. That vision shaped both the vision and structure for diversity and inclusion leadership at the bank. TD's diversity strategy has resonated with customers in the LGBT community, and with employees.

## Building pride about being out

Because leadership was supportive of diversity and inclusion for employees and customers identifying as LGBT from the start, once the conversation got going, big sponsorships such as Pride were able to do more than sell the bank to customers in the LGBT community. For employees, showing up at Pride and the events at work supporting it meant they didn't need to hide who they were in the office, and that the bank supported them.

TD now sponsors more than 50 Pride festivals in North America annually, with most of its funding going to the larger events in Vancouver, Toronto, Montreal and New York. The bank's participation has increased education and awareness widely across the organization and improved the culture for people identifying as LGBT by bringing the issues affecting them to the forefront; issues such as discrimination and bullying, suicide and the challenges of coming out at work.

Diversity and inclusion is led by the senior executives who make up the Diversity Leadership Council, with the LGBT Steering Committee reporting to them and the LGBT Working Group executing on planning. Each plan has a three-pronged approach to reach customers, employees and community giving (organizations and events sponsored by TD), so every initiative is relevant to each audience.



Using Pride season (May through September) as an example of how their three-pronged approach to planning executes, Pride festivals offer great opportunities to raise awareness for the challenges facing people identifying as LGBT within the workplace and to cultivate allies and champions. For customer engagement, their plan rolls out with select marketing tactics and for community giving, the plan supporting Pride involves short- and long-term sponsorships that can extend over the year.

## The challenges of geography

At CCDI, we frequently see how Canada's vast geography sets the country apart from so many others and creates a unique set of challenges in planning for diversity and inclusion. Not only is the population spread across large areas, but there are also pronounced regional and demographic differences in awareness for LGBT diversity and inclusion.

With about 1,150 branches in major cities and small towns across Canada, TD has noted how the experience for their LGBT employees and customers is different in some of the smaller municipalities than in larger urban centres such as Vancouver, Toronto and Montreal, so the bank builds that understanding into their planning on initiatives to address the differences that place can make.

To reach employees and managers in smaller communities, the bank has leveraged technology with digital initiatives such as anti-bullying campaigns and their Make It Better video ([link to come](#)) to support LGBT employees and help allies understand what can be done to improve inclusion.

## Creating the understanding for inclusion

How do leaders know what to pay attention to? Looking outward, at the competition, has helped the bank stay ahead of the curve on hiring and looking within the organization has helped them with retention as they've listened to understand employees and their needs. TD has put their focus on creating an environment where all employees can bring their whole self to work each and every day.

As the bank has been building pride about being out at work, their employee resource groups have been key to informing leadership about the challenges and opportunities facing employees. Their diversity planning comes out of what employees are saying, which is an inclusive approach that ensures the policies that are being developed meet employees' needs. The resulting awareness that's grown about the LGBT community and the issues they face shows the positive impact the bank's policies have had on corporate culture and productivity, helping the employer achieve on their goal to be a more comfortable workplace for people to come out and to be themselves in.

## What does success look like?

TD manages diversity and inclusion as a business function focused on customers, employees and community giving, so there are business goals for diversity. Their planning builds in indicators of success that come from marketing surveys with customers regarding:

- Brand recognition;
- Unaided recall for the bank on LGBT engagement;
- Competitive surveys with regional representation.

Across the organization, what they've been doing to build pride about being out at work – and, for customers, being part of the LGBT community – has resulted in positive growth for the brand among its three audience groups.

#### **Customers:**

**People identifying as LGBT feel supported as they see themselves reflected in the bank's communications and in-person experiences.**

#### **Employees:**

**As LGBT employees feel accepted and supported, they feel more included.**

#### **Community giving:**

**More than 100 LGBT organizations are sponsored due to the bank's commitment to Pride.**

## **Tactics that made a difference**

TD's model for governance, and their approach to marketing communications and change management for diversity and inclusion have helped them create a culture where diversity is valued and there are leadership opportunities for people identifying as LGBT, along with other under-represented groups such as women, Aboriginal peoples, members of visible minority groups and people with disabilities. The following are some of the tactics that have made it work.

### **Start from ground up**

TD grew into their approach for diversity and inclusion from what employees were saying, rather than starting with a strategy. The first LGBT groups were key to identifying the issues that their community was dealing with and that were holding them back at work. That early informal research from the employee resource groups shaped the first steps in programming, which led to more structural implementation as the work progressed.

### **Make diversity and inclusion a business function**

Implementing diversity in TD's strategic planning across their business units has included a business case for diversity which touches everything the bank does. As a diversity leader, Ron partners with the business units to ensure an inclusive environment for LGBT employees and customers across all the company's activities. Integrating diversity and inclusion as a business function means there is a business plan for it, which is implemented with tactics that can be measured for progress.

Analyzing surveys from Marketing that assess perceptions of the bank relative to its competitors, both nationally and regionally, has helped leadership focus their initiatives to address LGBT interests in the areas that can create an impact for the bank.

Results for initiatives are tracked for growth and assessed for how they have delivered on goals and objectives; reporting on progress goes to the Diversity Leadership Council. As diversity and inclusion has matured at the bank, there is a team within Human Resources devoted to the practice, rather than being relegated to a percentage tucked into another HR job description.

### **Inspire change**

As the bank has been helping people to be more inclusive, Ron emphasized the value that leadership support has contributed to the success of their diversity initiatives, saying that “Without it, all the great ideas and strategies wouldn’t be able to move forward.” It is clear how challenging it would be for diversity leaders to advance on employee engagement, social progress and to develop the funding for diversity initiatives without the support of executive leadership.

A line can be drawn from TD’s business strategy to its CEO asking how many employees applied for same-sex benefits, to the effects of sponsoring Pride, to engaging LGBT employees, customers and community organizations – to increased awareness for LGBT rights and issues.

And TD has become a leader in LGBT advertising. Ron talked about how, five years ago, he and others had to lobby their Marketing department for a same-sex version of a campaign; now LGBT diversity has become integrated in processes for Marketing and every campaign produced has a same-sex version.

### **From LGBT engagement to a change in culture**

When Ed Clark first championed LGBT inclusion and talked about some of the issues that had been causing alienation, he opened the door for social change within the bank, with its customers and the communities it is in. TD’s Business plan for diversity has grown to touch all areas for the bank and the current leadership team under Bharat Masrani, Group President and CEO, continues to champion a culture of inclusion.

A sign of success for diversity and inclusion is when it’s embedded in the business. The bank has successfully created a dialogue about diversity through a strategy for a more inclusive workplace. Looking ahead, TD’s diversity strategy is maturing to address the intersections of diversity as the cross-pollination of dimensions of diversity are becoming more relevant to how people identify now.

The bank has shown how it has listened to employees to plan for diversity and build inclusion. Though coming out at work is still an issue and a personal choice for many; for those identifying as LGBT who have connected at work and online, the bank is now a more comfortable place.

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## The Success story initiative

There is astonishingly little published that shines a light on diversity and inclusion successes in Canada, though there are many, across a wide range of organizations. Case studies referenced by trainers and leadership tend to be reporting on different countries, cultures, political and economic settings.

The goal of this initiative is to support diversity and inclusion leadership with stories that are relevant to what's happening now, here in Canada. By sharing their stories, we celebrate the successes of Canadian organizations while contributing to learning for everyone that cares about diversity and inclusion.

The employers who have developed initiatives to promote diversity and inclusion as priorities in the workplace are responding to an increasingly competitive economy that's responsive to the diversity of employees – and the country. We are grateful to those who have participated in interviews.

This series of case studies will be published monthly through 2016. Subscribing to our monthly newsletter at [ccdi.ca](http://ccdi.ca) will keep you updated with the latest case studies, which will all be posted online at [ccdi.ca/successstories](http://ccdi.ca/successstories). For more information, contact [communications@ccdi.ca](mailto:communications@ccdi.ca).

## The Canadian Centre for Diversity and Inclusion

The CCDI has a mission to help the organizations we work with be inclusive, free of prejudice and discrimination – and to generate the awareness, dialogue and action for people to recognize diversity as an asset and not an obstacle. Through the research, reports and toolkits we develop and our workshops, events and workplace consultations, we're helping Canadian employers understand their diversity, plan for it and create inclusion.

CCDI's leadership has a proven model that's cultivated trust as an impartial third party. Our expertise is focused on the topics of inclusion that are relevant in Canada now and the regional differences that shape diversity.

A charitable organization that thinks like a business, we have created a niche with our innovative research technology and data analysis that brings a deeper understanding of Canadian diversity demographics and mindsets at any given moment.

CCDI is grateful for the support of Employer Partners across Canada. For enquiries, contact Susan Rogers, Chief Client Officer, [Susan.Rogers@ccdi.ca](mailto:Susan.Rogers@ccdi.ca) or (416) 968-6520.

CCDI is grateful for the ongoing support of our Founding Partners:



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