

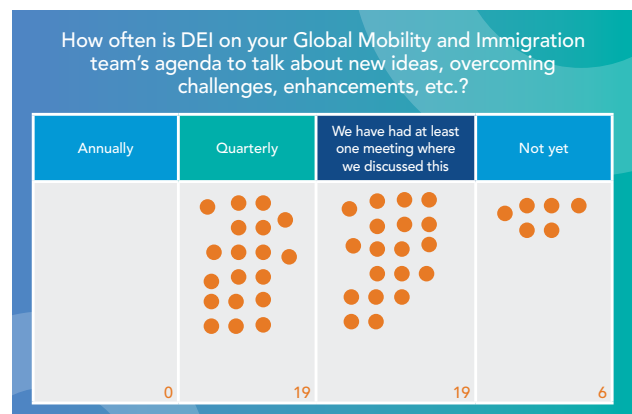
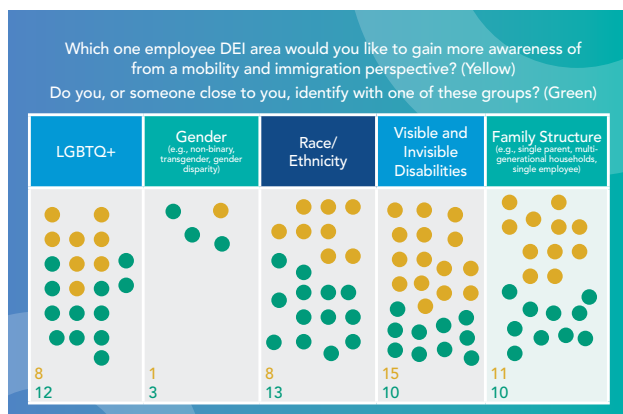
MAKING YOUR GLOBAL MOBILITY PROGRAM AN ALLY TO DE&I

RECOMMENDATIONS AND CARTUS CONSIDERATIONS

Companies today prioritize DE&I more than ever before and, unless you are starting a new business, there is an urgency to incorporate best-practice DE&I strategies into existing policies and practices. Increasingly diverse employees and the expanding definition of “family” require new, inclusive ways of working in Global Mobility— inclusive language, naming conventions, leadership, onboarding, and support. Cartus held a workshop at the 2022 Worldwide ERC® Global Workforce Symposium that was designed to have an accessible approach to meet diverse participant needs and to generate actions and ideas to move our industry forward. **Ultimately, our goal is for all relocating employees and their families to say, “They knew I was coming” and “I belong.”**

Live Polling

Our workshop featured live polling, using a low-tech, accessible approach, that asked questions on various topics within the DE&I Mobility sphere. Participants shared their perspectives and organizational actions on four questions, starting with aligning mobility and immigration strategies with DEI. Similar to Cartus’ recent DEI Mobility pulse survey, companies tend to be in early stages of progress and few companies consider themselves leaders. When it comes to Immigration program alignment, more companies place themselves at the earliest starting point of strategic changes. Polling also asked participants which diversity categories they were most interested in learning more about. Unsurprisingly, mobility strategies for people with visible and non-visible disabilities received the most interest. In Cartus’ recent pulse survey, 89% of participants hadn’t made any changes to policy or program to support disabilities. See below for more insights from the live polling.



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Scenarios

The workshop began with a single scenario about an international assignment opportunity intentionally constructed to draw out tabletop discussions related to stakeholders who contribute to the assignment's success. The focus was on what could have been done differently to ensure that barriers and challenges faced by the employee and the organization would have had a different outcome or might have been avoided.

What follows is the summary of suggested actions from workshop participants for each stakeholder (the manager of the assignee, the immigration team, the assignee, the company's Global Mobility team, and suppliers). Additional Cartus DEI Mobility considerations are also highlighted for each role.

DISCUSSION 1: FALSTAFF AND HIS FAMILY

In the opening discussion, the fictional character, Falstaff, receives an international assignment offer to Japan. He has multiple factors to consider when deliberating whether to accept the assignment, including the effects such a relocation might have on his husband and their son, who is on the autism spectrum. Workshop participants collaborated on possible actions for Falstaff's manager, his organization's immigration and global mobility teams, and Falstaff himself.

ACTIONS FOR FALSTAFF'S MANAGER

Become more informed at the leadership level utilizing approaches such as:

- Cross-cultural training and increased global mindset for local culture awareness and nuances.
- Ask for an immigration red light/green light tools/reports and other resources by destination. Understand what limits their specific locations of interest may have (e.g., not recognizing same-sex marriages).
- Involve your mobility partners EARLY for guidance before offering a role in another country.
- Attend their mobility program's trainings on immigration, DEI, destination cultural orientations, etc.
- Have an intake call focused on the family; candidate assessment is critical. The company should get more information ahead of time to ensure a successful assignment.
- Meet with employee to determine what additional areas need to be considered for the employee and family.
- Identify the right resources: global mobility usually knows more about mobility than HR business partners.
- A candidate selection program would be essential to provide more knowledge to the employee to allow him and his family to determine if the move is best for them (inclusivity).

- Working on employee inclusion, the manager should know that same-sex marriage is not legal in some countries. Companies need to have more in-depth knowledge of their employees so they can prepare in advance and be a proper resource for their employees while ensuring they feel heard and included.
- Manager should provide more information to the employee so it can be the employee's final decision.
- Manager needs an inclusive leadership approach to create trust and better understand the employee's situation.

CARTUS CONSIDERATION

- The person making an assignment offer is often called the "Selection Manager." Today Cartus is seeing companies recognize the importance of inclusive leadership in this pivotal role. This will include enhancing the manager's knowledge and DEI confidence and becoming aware of DEI Mobility issues like immigration barriers for LGBTQ+ employees.
- Before offering an employee an assignment opportunity, tap into the Global Mobility team as a resource so that they can guide the manager and employee through the process and serve as an ally.

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ACTIONS FOR IMMIGRATION TEAM

- Ask and collect information on destination country and country nuances.
- They need approval to offer the role; how did the role come about? There should be formal approvals first before offering assignment.
- It's not just getting people there but also the duty of care once they are there. What is the life experience when they are in the new country?
- With an employee in a same-sex marriage, pull in immigration immediately to properly communicate what is needed to the manager, global mobility, and the employee.
- Consider having a color code that helps recognize where same-sex partners or other diverse family circumstances might have challenges or need to research the location further due to immigration laws.

CARTUS CONSIDERATION

- Immigration providers (or internal teams) can create a DEI mobility guide with DEI related immigration insights for the Global Mobility team and Selection Manager(s).

ACTIONS FOR FALSTAFF

- Approvals for standalone benefits (healthcare/visa). Special benefit for child.
- Become informed. Speak to the LGBTQ+ ERG in the company to educate others on what to look out for when preparing for an international opportunity.

CARTUS CONSIDERATIONS

- Before receiving a formal offer, employees should consider opportunities such as business travel and temporary transfers to gain exposure to international career experiences.
- In organizations where DEI values are ingrained in the culture, managers are held accountable for inclusion, and diversity is expected and celebrated, employees will be more likely to be open about their invisible diversity.

ACTIONS FOR GLOBAL MOBILITY TEAM

- Provide candidate assessment to determine eligibility for visa/family visas.
- Global mobility needs to be aware of the many diverse employees and how diversity can impact certain moves and locations.
- Put flags or make a note on parts of the policy that DEI may impact.
- Change the mindset around core/flex benefits. If your policy is heavily focused on the "core," people may not understand how the "flex" applies to them, perhaps even perceiving flex benefits as "exceptions" rather than "inclusions."
- Offer cultural assessment.
- Engage school placement services for discussion/consult on child scenario so family can best understand next steps.
- Talent needs education on locational challenges and needs.
- Educate employees with diverse characteristics and set expectations around how things may be different in the new country.

CARTUS CONSIDERATIONS

- Some employees prefer to keep their personal lives to themselves for various reasons, from privacy to fear of discrimination or personal safety. This is especially true when a person is part of an underrepresented population with a history of discrimination and lack of acceptance, and fear of criminal repercussions. The Global Mobility team needs to ensure that information and benefits that support diverse employees are visible and accessible to the employee. The intranet site, policies, videos of diverse assignees, and images that allow diverse employees to see themselves represented are all useful.
- Global Mobility teams need to gain DEI confidence. Where does the company do business? Which facilities and locations are more accessible to people with visible and invisible disabilities? Which locations are more welcoming and accepting of diverse, under-represented populations? Which locations are less welcoming or not at all? What security briefings can the program offer? Make DEI Mobility confidence a goal for your team.

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ACTIONS FOR SUPPLIERS

- Start providing information from assessment as soon as possible.
- Improve the intake or initial call process to understand needs and ways to support. Consider adding open-ended questions.
- For people relocating employees with autism in the family, or themselves, consider hyper-specific details like “how the sheets feel” and use a supplier partner that understands these issues.
- Converse with someone locally to understand how it would be to live in the country.

CARTUS CONSIDERATIONS

- Wherever the destination country’s paperwork and legal requirements limit pronouns and require other non-inclusive language, it is critical that the supplier is prepared to be an inclusive conduit between these limitations. Show empathy and continue to respect and utilize the employee’s or family member’s preferred pronouns and terminology aligned with the company’s overarching DEI values.

ADDITIONAL ACTIONS

- Global Mobility/HR/the Business can propose another country.
- Legislation prevents you from asking certain questions in advance, and employees may not be comfortable sharing proactively. Work to develop trust with employees so they feel more comfortable sharing information.
- ERG (employee resource group):
Is an employee working for a company where they feel comfortable being themselves in the first place? Create an inclusive and safe environment for diverse employees to be themselves.
- Is corporate culture one where someone would feel comfortable sharing diversities, and do employees know they are free to share?
- Mentor program for new hires.

DISCUSSION 2: NEW INFORMATION EMERGES

In the second group discussion, attendees explored three separate scenarios, divided across tables, that follow Falstaff on his employee journey.

SCENARIO A

In Scenario A, Falstaff and his company decide to relocate him to Italy instead of Japan. Falstaff, who is in a wheelchair, needs to evaluate how accessible his office will be.

AHA Moments at the Table

Each location has cultural differences, but if DE&I is a driver for the organization, leadership will have to assess the company overall and address these local nuances.

ACTIONS FOR FALSTAFF’S MANAGER

- Become disability confident and get to know what types of wheelchair options are more adaptable. Hire a travel assistant.
- Understand employee needs and tap into resources to determine if office and housing are physically set up to accommodate Falstaff’s needs.
- Find out if someone in the local office in a similar situation can help provide options and resources.
- Schedule pre-assignment trip or a virtual trip.

ACTIONS FOR FALSTAFF

- Connect with local business office regarding access to facility and other potential local area challenges.
- The office layout needs to be reviewed to allow Falstaff to provide input before he arrives.
- Ask if there is anyone in the new office with a similar disability who could give advice.

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ACTIONS FOR GLOBAL MOBILITY TEAM

- In-depth phone conversation: who is moving (family; define why the change and updates)?
- Understand what steps need to be taken for each service area (e.g., flight, getting through immigration, temporary housing).
- Talk to the local office in the destination location (take pictures, connect with HR team members and colleagues).

ACTIONS FOR SUPPLIERS

- How do we manage upwards to be advocates for the employee?
- Tap into local suppliers to determine how other organizations have addressed these needs.
- Tap into the RMC and their experiences with other companies and local DSPs to prevent having to reinvent the wheel.

SCENARIO B

In Scenario B, Falstaff is reassigned to a new promotion in Colombia. His partner is concerned about safety and the duty of care that the company will provide their family and how he will find a job while supporting Falstaff abroad.

ACTIONS FOR FALSTAFF'S MANAGER

- Provide International SOS, kidnapping insurance, etc.
- Housing should be offered in a specific gated community.
- Focus on the husband's job, which is often a critical component of the assignment success.
- Provide a car and driver for the family to support safety and take the child to school.

ACTIONS FOR IMMIGRATION TEAM

- Look into any legalities that might prevent the partner from going to Colombia, and confirm he can work there.

ACTIONS FOR FALSTAFF

- Ask about cross-cultural and language training support.
- Get a security briefing.

CARTUS CONSIDERATION

- Familiarity with the destination location's cultural norms, safety, and partner support options are essential; cross-cultural and language training support will better prepare the assignee for living and working in the new location. The Global Mobility team can partner with the organization's security team to offer briefings and develop a strategy for transferees and their families.

OTHER ACTIONS

- Look for external resources, such as Mobility International (a nonprofit organization that helps students with disabilities who want to study abroad).
- Speak to other departments as they could discover other offices are not set up to accommodate disabilities.

CARTUS CONSIDERATION

- Work with facilities and local HR teams to assess office locations where transferees are sent and ensure they are accessible. Identify location-specific accessibility attributes and barriers. Selection managers should encourage employee-led discussions and speak to local resources to determine whether an office space will make for an inclusive environment.

ACTIONS FOR GLOBAL MOBILITY TEAM

- Educate the employee and family about life in Colombia so that they have more realistic expectations.
- Become DEI Mobility confident with knowledge about your locations and DEI nuances in those locations.

ACTIONS FOR SUPPLIERS

- Consider a buddy system for the assignee and someone local with experience in the host location.
- Cultural training/coaching is critical in preparing for the move.
- Provide partner support and cross-cultural and language training as your partner duty of care package.

OTHER ACTIONS

- Bring all relevant parties together to discuss situation.

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SCENARIO C

In Scenario C, Falstaff decides to move to Japan following his divorce and with full custody of their son. He is in the midst of deciding how this promotion will affect his life.

AHA Moments at the Table

Allocate additional trips home so the child can see their other parent or pay for the parent in the home location to visit their child in the assignment location.

ACTIONS FOR FALSTAFF'S MANAGER

- Decide if DE&I is a priority in your organization to help justify doing things differently (e.g., offering support to diverse candidates like Falstaff might, in some cases, generate different costs/policy exceptions (inclusions) that would affect others' views and force a policy change and budget increase).

ACTIONS FOR IMMIGRATION TEAM

- Advise on visas and medical requirements for the immigration process.

ACTIONS FOR FALSTAFF

- Check on local benefits, duty of care (special needs services, trips home for child to visit other parent or other parent to visit in destination location), allowance for childcare or au pair.

ACTIONS FOR GLOBAL MOBILITY TEAM

- Communicate with suppliers to get information on extra or different benefits required.
- The company can offer to cover extended family member eligibility in lieu of spouse.
- Cover childcare/cost of nanny.

ACTIONS FOR SUPPLIERS

- Provide cultural services to support diverse needs.
- Settling in, emotional support (REA, for example) to support family; starts before assignment and through integration.
- Education support through education provider vs. DSP; more specialized support for special education needs.

OTHER ACTIONS

- Recognize the importance of a family's ability to adjust to the new location and its direct relationship to assignment success.

CARTUS CONSIDERATION

- Make sure that inclusive benefits are more explicit, making the connection for the transferee. Additional support for single parents can include covering the cost of an additional round-trip ticket to allow the employee to bring a friend or family member to help get settled in at the start of the assignment. Work with supplier partners and immigration providers to ensure options are available to support diverse employee needs and to ensure transferees feel like they belong as they go through the process.

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CARTUS' DEI MOBILITY SOLUTIONS

Cartus offers an array of solutions designed to support DEI in your global mobility program, including:

- **Inclusive policy and program design** that empowers your employees and effectively supports their relocation journey.
- **Intercultural and language coaching**, which combines consultative coaching and personalized performance support within a digital learning environment, provides your global talent with expert guidance to develop the skills and mindset required to be most effective in diverse, multicultural settings.
- **Virtual Resource Center (VRC)** customized to support recruiting critical talent, including targeted, diverse, and underrepresented employees into key locations.

LEARN MORE ABOUT OUR LATEST DEI MOBILITY SOLUTIONS:

Inclusive Selection Manager Coaching and Workshops

- Prioritize DEI in the assignment selection process.
- Empower selection managers to approach their role from the lens of DEI.
- Manage unconscious bias and develop measurable outcomes for selection.

Inclusive Host Location Manager Coaching and Workshops

- Support managers of assignees or transferees with inclusive onboarding.
- Ensure managers with diverse teams are inclusive leaders.
- Recognize personal and team member unconscious biases when it comes to diversity, including cultural diversity, the difference in levels and styles of communication, and equity surrounding performance appraisals.

Wherever your organization is in its DEI Mobility evolution, let Cartus work with you on next steps and short and long term goals. For more information, please connect with us at cartussolutions@cartus.com.