

Diversity, Equity, and Inclusion (DE&I) are no longer just trending keywords: they are now at the core of organizational priorities and policies across the globe. In order to better understand the role that DE&I plays at a strategic and tactical level across markets and borders, Cartus conducted a pulse survey that garnered responses from more than 50 companies worldwide.

The bottom line is, despite the ever-growing influence of DE&I within organizations, global mobility teams are not yet at the forefront of necessary change. Cartus' pulse survey explores where global mobility is today regarding DE&I and the areas in which it has opportunities to improve at the program and policy level.

When respondents were asked how closely connected their global mobility/relocation program is to their organization's overall DE&I and/or talent acquisition strategy, **19%** replied "very connected," **50%** felt "somewhat connected," and the remainder "did not feel connected." Of those who felt either somewhat or not connected, **60%** have plans in the next two years to better align their global mobility program with organizational DE&I objectives.

One consideration must be noted before diving into the implications of the survey results. Based on the headquarter locations of the respondents, the sentiments collected in the survey largely represent a U.S.-based work environment. To better understand how DE&I is being prioritized across global corporations, Cartus will conduct a deep dive into regional nuances in the coming months.

TRACKING DIVERSITY DATA AND EXPLORING TALENT POOLS

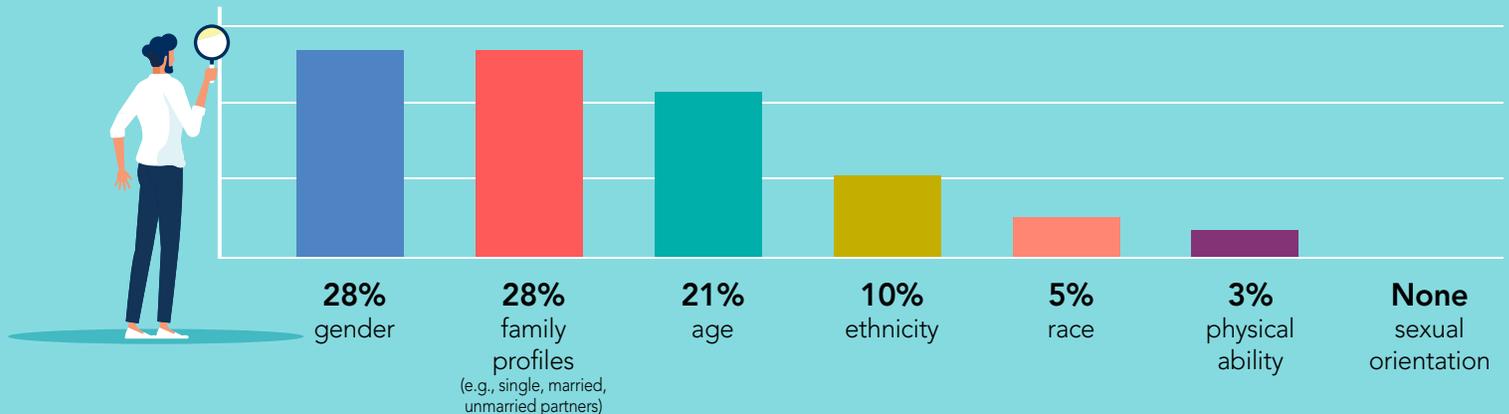
How does tracking diversity data related to relocation and/or global mobility populations benefit an organization?

Similar to efforts by talent acquisition professionals to understand the diversity of an organization's workforce and adapt their talent recruitment strategies based on these insights, global mobility professionals have the opportunity to extend this strategic approach to managing mobile populations. By understanding the talent profile of those receiving transfer or assignment opportunities, an organization can better evaluate how diverse that pool is—or isn't—and determine how to take action to expand those opportunities in alignment with broader organizational DE&I initiatives.

While **77%** of respondents are not currently tracking diversity data related to their relocation and/or global mobility program, more than half—**55%**—of these respondents indicated that they plan to track this kind of data within the next two years.

Of the 23% of respondents who do track what they believe to be relevant diversity data, the type of data collected greatly varies from company to company:

DIVERSITY DATA TRACKED BY COMPANIES

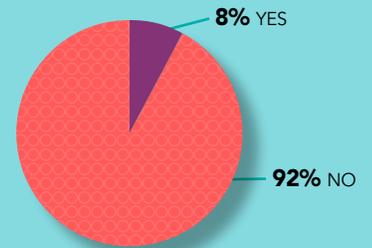


These low numbers have implications for understanding racial diversity or LGBTQ+ representation within relocation and global mobility programs, as well as whether relocation policies support the inclusion of employees (or their accompanying family members) with differing physical abilities.

Additionally, **92%** of respondents indicated they are not tracking assignment acceptance or decline rates, and the majority—**62%**—do not utilize a talent pool from which to identify employees with interest in assignments or other forms of relocation.

Evidently, the tracking of more program data is an area of opportunity for relocation and global mobility teams to increase insights into the make-up of their mobile population(s)—and to look more closely at the acceptance and decline rates for relocation (and the reasons for these rates) across the diverse background of their workforce or potential talent pool.

Do you track assignment acceptance & decline rates related to DE&I?



SUPPORTING EMPLOYEE INCLUSION

A critical element of DE&I is **inclusion**—ensuring that employees feel heard, valued, and included within the organization. Relocating employees face the challenge of adapting to a new work environment and community to which they are not accustomed and for which they can be frequently unprepared as they strive to build new relationships and connections. Providing support is crucial to ensuring that newly relocated employees—and all community members—feel valued by the organization and included in their new work environment.

When asked what type of support their organization provided to network, connect, and otherwise facilitate the inclusion of relocated employees, some of the answers included:

- Encouraging newly relocated employees to provide their input, ideas, and feedback throughout the onboarding experience and in relocation experience surveys
- Utilizing Employee Resource Groups (ERGs), new location integration support services, and/or an employee onboarding plan
- Having regular catch-up calls and/or group onboarding sessions
- Providing learning and development or training support
- Including cross-cultural coaching in the onboarding program
- Establishing a host “buddy” or mentorship program, as well as networking and mentoring groups—within the organization for employees and within the community for spouses/partners
- Connecting transferees/assignees with leadership and/or making managers responsible for their inclusion
- Offering Employee Assistance Program (EAP) support and/or a hotline
- Surveying relocating employees on their relocation experience



LEVERAGING NEW SKILLS POST- ASSIGNMENT

An international assignment creates multiple opportunities for relocating employees to grow personally and professionally,

including exposure to different ways of working and the development of a more inclusive mindset. With the significant investment in globally mobile talent, organizations benefit by leveraging the skills and experience gained by returning employees, and in doing so, create a more diverse and inclusive work environment.

While there is much to be gained by leveraging an assignee's broadened perspective and more inclusive mindset post-assignment, many organizations have yet to act upon the opportunity. In fact, previous studies have shown that the lack of corporate interest in showcasing and utilizing expat learnings and expanded capabilities upon return to the home location frequently results in attrition from the organization within one to two years.

In this survey, only **31%** of respondents indicated that, when global talent returns from an international assignment, their organization leverages their employee's newly developed skills. The majority of these respondents (10 out of 16) noted the impact of the international assignment experience, skills, and mindset on **career progression or promotion**, providing the returning employee with higher, more challenging, or more expansive roles—some of which require global experience as a prerequisite:

- *"Often an international assignment prepares the employee for a larger, more global role within the organization. Without the global experience/mindset gain on assignment, the employee would not have been appropriate for a global role."*
- *"Usually they come back to an expanded role—allowing further application to knowledge and skills."*
- *"At certain levels, the international experience is a prerequisite for the next step in their career progression."*

Other respondents stated that their organization showcases, applies, or otherwise leverages the assignee's knowledge and skills through coaching, mentoring, and/or connecting employees with counselors prior to and after repatriation to provide continuous support, including post-repatriation coaching; while others were unaware of how this was being managed at the business level.



INCORPORATING DE&I PRINCIPLES INTO POLICY REVIEW

Another important aspect of DE&I is the use of non-discriminatory or exclusionary language across mobility policies and programs. Only **33%** of respondents have reviewed mobility policies to ensure inclusive services and non-discriminatory language are utilized. Of that 33%, some specific changes that have been implemented include:

- Using only the plural pronoun (they, them, their) to refer to an expat or many expats

- Ensuring policy language is open to include same-sex partners and various types of family arrangements (e.g., using the more neutral term of "partner" in lieu of specifying the type of partner or spouse; extending policy support to non-married partners)
- Re-branding spouse/partner assistance to a broader category of "Integration Services" so it is available to all eligible employees, including singles
- Adding a trip for single employees going on assignment that allows them to bring over a friend or relative at the start of or during their assignment

Of the **67%** who have not yet reviewed their policies, common replies included:

- Currently reviewing and want to redesign policies
- Planning to review to ensure market competitiveness
- Mobility policy review is planned and would be directly overseen by their in-house DE&I team
- No plan in place, but it is on the radar
- Policy review is not a huge priority but may be explored further in the future

Taking this to the next level—from a mobility policy/program aspect—global mobility managers may want to start the conversation with the business regarding the possibility of multi-generational support for parents or grandparents who live with or are the responsibility of an employee being relocated, which is common in many locations and cultures around the world. Additionally, programs should consider how to better support single parents so they can go on assignment, and how to support any employee who wants to advance their career but may be at a time in their life when there are obstacles that may seem insurmountable, such as raising young children.

COACHING SUPPORT FOR ASSIGNEES

Global mobility is a natural enabler of diversity and inclusion, as it directly supports talent embarking on international assignments across the globe—and in doing so, increasing their

exposure to diverse ways of working, communicating, and navigating environments where many find themselves in the minority for the first time.

To maximize the organization's potential, assignees working across different cultures and languages must be properly equipped to bridge the cultural and linguistic diversity they encounter in order to thrive on the assignment, while also providing accompanying partners and family members the knowledge and tools to manage the transition to living in a new environment.

Intercultural coaching—to develop cultural awareness, illuminate unconscious biases, and develop strategies to mitigate how these may impact success on assignment—is critical, and language and/or communication coaching—to support inclusion efforts, allowing each voice to be heard and understood in a very fundamental way—are generally considered key to enabling success.

Responses to the survey support these points:

- **71%** of respondents provide language and/or communication coaching for non-native speakers
- **67%** of respondents provide coaching for the development of cultural awareness

These same respondents—those who are providing language and cultural coaching—had a higher response rate supporting diversity of family structures in their policies (**89%**).

Interestingly, there was also a strong correlation between the **69%** of respondents who indicated that their global mobility or relocation program was “very connected” or “somewhat connected” to their overall DE&I and/or talent acquisition strategy and the number of those who are providing (or plan to provide in the next two years) cultural coaching (**83%**) as well as language and/or communication coaching (**75%**).

A similarly strong correlation was seen in responses from those utilizing a talent pool for global mobility and those who are providing cultural coaching (**75%**) as well as language and/or communication coaching (**80%**); and also those who are leveraging the expanded skills and mindset of returning global talent and those who are providing cultural coaching (**88%**) as well as language and/or communication coaching (**81%**).



DUTY OF CARE AND THE LGBTQ+ COMMUNITY

Duty of care—which refers to the obligation an organization has to its employees and family members as it pertains to their health, well-being,

security, and safety when working on an international assignment, or in a location that is not their home location—becomes even more complex as an organization consciously practices inclusion and offers opportunities to the LGBTQ+ community.

For the many organizations who are not tracking diversity beyond gender and family size, offering an opportunity to relocate to a country that might consider homosexuality illegal can present a danger to both the employee and the company. Duty of care requires that someone in the organization, and quite possibly within the business' Global Mobility function, needs to be aware of country standards for each location to which employees might be sent. In addition, this information needs to be provided to each employee contemplating an assignment or relocation so the employee can make an informed decision about taking the opportunity.

On this topic, our respondents indicated a high level of awareness—with **65%** indicating that, for the destination countries to which they send talent, they are indeed aware of the status of DE&I topics in the local environment to ensure expat safety. Related to this consideration, **60%** of respondents have also considered ways to address circumstances where a spouse/partner may not be able to move to a certain location for safety and security reasons.

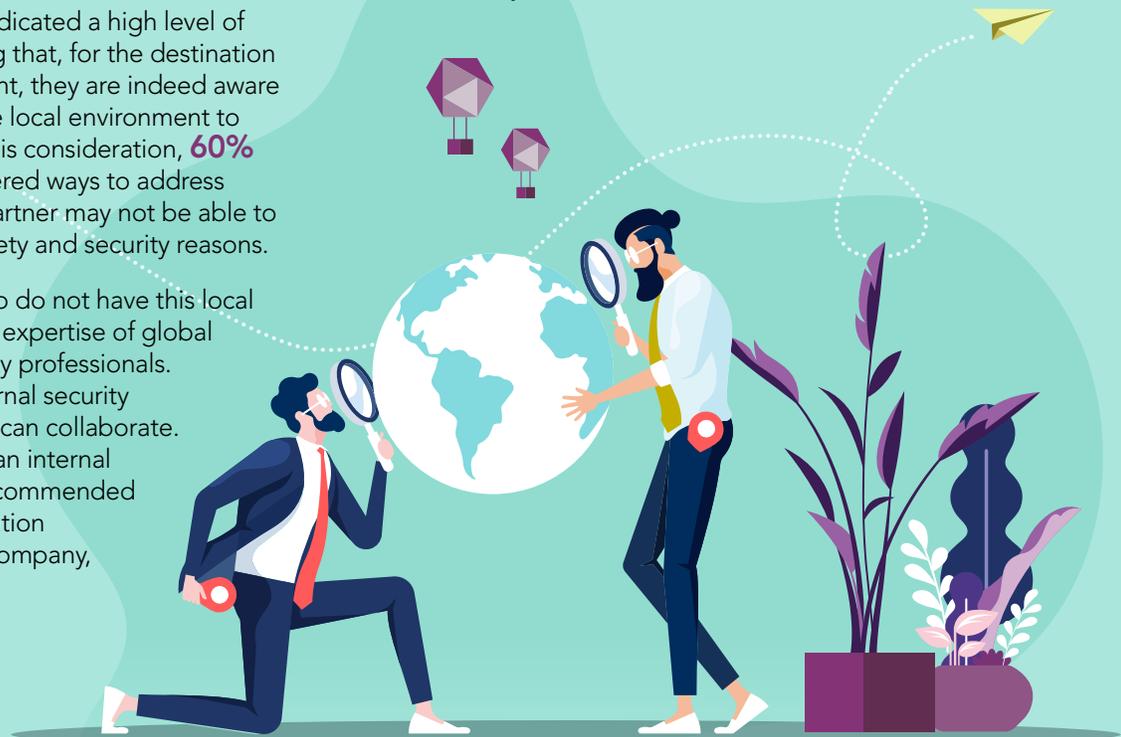
For the **35%** of respondents who do not have this local insight, it is advisable to seek the expertise of global legal, immigration, and/or security professionals. Many multinationals have an internal security team with whom Global Mobility can collaborate. If an organization does not have an internal global security team, then it is recommended to engage with either an immigration partner or a health and security company, like International SOS.

Integration Services and Spouse/Partner Support

In a situation where a spouse/partner is unable to live in the host location due to local laws, our respondents shared a variety of ways in which they address this. Many are reviewing on a case-by-case basis, while others shared unique approaches. For example, in some scenarios, it may be possible for the spouse/partner to stay in a nearby country and for the company to make arrangements for the employee to travel there a certain number of times per month—like in a commuting assignment. Alternatively, other respondents indicated an increased number of home leave trips or extra flights for the employee to travel back to the home country more often than standard policy dictates.

"If they are not able to move due to legal restrictions in the host country, then we are not able to support the spouse/partner to move. However, benefits are provided to support the spouse/partner remaining in the home country."

Lastly, if the employee is willing to take the assignment, consideration may be given for decreasing the length of the assignment and completing it remotely from back in the home country, if feasible.



CONTINUING YOUR DE&I JOURNEY

As organizations continue the journey of creating a truly diverse, equitable, and inclusive mobility program, they are seeking ways to ensure that any previous barriers are removed. Some key concepts/support under consideration include:

Overall Program

Establish DE&I priorities and goals for relocation—for example, if the priority is to grow diverse representation, develop mechanisms to measure, analyze, and act on insights.

Understand DE&I employee concerns and priorities—collect and review feedback from diverse employees (those who moved and those who chose to decline their offer) to better understand barriers to successful relocations from a DE&I point of view.

Study current and future mobility locations and analyze whether all company talent can move to all locations and, if not, how to address those locations (e.g., for LGBTQ+ employees who are not able to go to parts of the Middle East, are there other options they can be offered for a similar experience?).

Employee Selection

To ensure everyone interested in global mobility is considered, look to develop enterprise-wide talent pools to increase options. On a larger scale, ask if mobility is really accessible to all employees. In general, only **30%** of assignees are female. What can be done in your organization to increase that number?

Has a truly diverse group of employees been considered for the opportunity? Do the current recruitment and selection processes allow for inclusion of a broad spectrum of candidates? Pressure test your selection process against unconscious bias.

Employee Preparation

Early immigration, tax, and security briefings are key to ensuring employees have a holistic understanding of their legal status and environment. Intercultural coaching delivers the tools to help employees and families manage transitions across cultures as they embark on assignments and the ability to recognize what is appropriate and what will work best in a different context. Targeted language coaching equally supports cultural transitions in a very fundamental way.

Practical Relocation Support

Review policies with a DE&I lens. Are the policy offerings and language used inclusive of everyone? Do words like “family” need to be redefined?

Utilization of a flexible policy framework (e.g., core/flex) can help employees select and define benefits that best support them and their family, as one size does not fit all (e.g., single parent families, LGBTQ+ relationships, adult children).

Career-focused Support While on Assignment

Consider what support networks can be made available to employees in the host location. Mentorships and employee resource groups and local networks can be a vital source of support and enablers of inclusion.

For more information on DE&I within global mobility, please contact us at cartussolutions@cartus.com.

