



**Regulation Matters:
a CLEAR conversation**

Episode 81: Telling Our Story - Reflections and Progress on CLEAR's DEI Journey September 10, 2024

Line Dempsey: Welcome back to our podcast, Regulation Matters: a CLEAR conversation. Once again, I'm your host, Line Dempsey. I am currently the chief compliance officer with Riccobene Associates Family Dentistry here in North Carolina, South Carolina, and Virginia. I've also been a board member and past-president of CLEAR.

As many of you are aware, the Council on Licensure, Enforcement and Regulation, or CLEAR, is an association of individuals, agencies, and organizations that comprise the international community of professional and occupational regulation. This podcast is an opportunity for you to hear about important topics in our regulatory community.

In this month's episode, our conversation is going to focus on CLEAR's DEI journey. CLEAR's President and Board of Directors would like to share CLEAR's DEI story with you, both internally as an example of an organization looking at DEI and externally as a clearinghouse of resources related to DEI. Joining us today is CLEAR's president, Marc Spector; and president-elect, Staci Mason; and chairs of CLEAR's DEI working groups, Phong Van, Daniel Roukema, and Michael Carpenter. I'm glad to have the opportunity to talk with you all today.

Marc Spector: Thank you so much, Line!

Staci Mason: Thanks for having us.

Daniel Roukema: Hey, Line!

Phong Van: Thank you, Line! Glad to be here.

Mike Carpenter: Hey! Hi, Line! Great to be part of this today.

Line: It's great to chat with you all again. Well, I did wanna start by saying that there are kind of two elements of CLEAR's DEI story. Let's start by talking about CLEAR's internal journey as an organization looking at DEI, and how that can maybe be an example to other organizations wanting to look at DEI issues. I know back in 2020, CLEAR's board underwent a series of trainings around unconscious bias and discrimination and its impact. We talked about that in a previous podcast episode. And a key point you made then, Staci, was – what are we going to do with the training, and what's the action?

So, can you talk to us about how, in the time since then, DEI elements have come to be included in CLEAR's strategic plan?

Staci: Absolutely! Thank you, Line.

Well, since 2020 following that unconscious bias training undertaken by the Board, diversity, equity, and inclusion elements have been systematically integrated into the strategic plan of CLEAR. And this process has unfolded in various ways. So, I'll just highlight a few.

In terms of initial awareness and education, the training revealed the extent to which our unconscious biases could affect regulatory decisions, member interactions, and CLEAR's overall culture. It highlighted the need for proactive DEI efforts to ensure fair, equitable, and inclusive treatment of all of our members. And this training led to a strong commitment from the board to embed DEI principles into CLEAR's core operations and strategic initiatives.

So, what did we do? An internal audit was conducted to assess the current DEI practices and identify areas needing improvement. This involved analyzing our membership, demographics, various processes, and things of that nature. A survey was conducted as part of a conference session I presented with Sandy Greenberg to gather insights from members regarding their experiences and perceptions of DEI within CLEAR as well as their own organizations. And this feedback provided valuable data to inform our strategic planning.

Our initial integration into the strategic plan started with a new DEI mission statement, and that was crafted to reflect our commitment to fostering an inclusive environment. And this statement was also integrated into the overall strategic plan.

So, some action plans and implementation. A dedicated DEI committee was established to oversee the implementation of these DEI initiatives, and I was appointed as the inaugural chair. (Thank you, Line.) The Committee includes diverse representations from various membership demographics, and four working groups were formed to begin the work. You'll hear more about this in a moment from their respective chairs, Mark, Daniel, Michael, and Phong. So, thank you guys.

Since that time, various DEI conference sessions were presented at our annual educational conferences, and these sessions covered such topics as inclusive leadership, cultural competence, and anti-bias strategies in the regulatory space.

How are we monitoring and maintaining accountability? Well, specific measurable goals are being developed, such as increasing diversity in our membership and our leadership roles, ensuring equitable practices, and enhancing member engagement from underrepresented groups. And with the help of the DEI committee working groups, key performance indicators are being established to measure the success of our DEI initiatives.

And you know, CLEAR is committed to transparency and providing regular updates. So, we'll do that to all members. They'll be shared through our annual reports and newsletters. And we do have a dedicated [DEI section on CLEAR's website](#). So for all of you listening, if you haven't seen it yet, please, I implore you to go to our website and check out what we've been up to.

Continuous feedback from members is so important to us. We'll seek it out through surveys and other opportunities, and it will be used to refine DEI strategies and address any emerging issues. So please, please, please give us your feedback.

So, what does this mean in terms of practical implementations? Ensuring diverse representation among speakers and panelists at our conferences and offering sessions focused on DEI topics related to the regulatory field are just one way. Also, using inclusive language in all communications, and ensuring marketing materials reflect the diversity of our membership. And providing resources to support all members, such as our new program, Elevate, which I am a member of. I am one of the mentors, and it's a great program. There are various other networking opportunities around CLEAR and the education materials on DEI best practices in the regulatory context that, again, are posted on our website.

So, by incorporating these DEI elements into the strategic plan, CLEAR has made significant strides in creating a more inclusive, equitable, and diverse environment for our members. And while the unconscious bias training that you talked about, Line, played a critical role in initiating this transformation, fostering a deep understanding and commitment to DEI at the highest levels of leadership, as I always say, the forever work continues.

So, I'll turn it back over to you, Line, and I can't wait to hear more from our working group chairs.

Line: That's awesome. Well, thanks so much. Those are certainly worthy goals and measures to work towards. And I know as any organization works towards strategic goals, one great resource is to learn from the insights and challenges of others. Marc, can you share with our listeners some of the insights and challenges to CLEAR's DEI journey so far?

Marc: Well, thank you, Line, and absolutely happy to do that. And thanks for including me in this. Cause there's certainly been a few of both. We've had some uncomfortable conversations and some real assessments of ourselves and as CLEAR as an organization.

You know, for some of us, we were perhaps surprised to learn that maybe we weren't as far along the journey as we thought we were, and I know that's how I felt. And then, right after that gut check, another one was just about to begin. Where do we even start? How do we begin this conversation?

And I remember our very first meeting with our small but mighty working group. It was four of us, and we were on a call, kind of looking awkwardly at each other and feeling the weight of the moment, and a bit paralyzed. And that's when Staci, you said, 'Well, let's just start somewhere.' Just do something.

It doesn't matter where; just make it happen. And, Staci, that was the first time I ever heard you say the words, 'It's forever work,' and that's always resonated since.

So, we did so. We started combing through resources produced by other organizations that we liked and we thought that could be helpful for us and regulators around the world. It started slowly, like really slowly, maybe only once a month. And although at first it kind of seemed like a slog, we immediately saw an opportunity and some incredible enthusiasm.

For example, about a year or so after that working group, CLEAR created the DEI Committee, and it entrenched it in CLEAR's bylaws for our legacy. But we really didn't know what the response would be. I can tell you, I had no idea that its first year that committee would have over 50 volunteers. And that was overwhelming.

For the others on this call, I don't know if you remember, but I sure do. Our very first committee meeting - it was in Savannah. It was at a Midyear conference, and it was the first time that people were getting together at CLEAR after a couple of years. It was a hybrid event. And that was a really really powerful moment for me, because we were bringing together the international community on something that was really really important for us.

And a little moment that most of you don't know, but at the end of that meeting, Staci and I had a really supportive hug. At the end of it, Line, I don't know if you remember this, but you took this really awesome photo to capture the moment.

Line: Absolutely. Yeah.

Marc: I kept that photo, and it's still one of my favorites. So thank you for that, Line. And for me, I go back to that photo for inspiration when I tend to feel that it's all a little bit of a slog.

Line: Well, Marc, I don't know if you've got the one where I photo bombed it as well as I took the picture. That's one of my favorites.

Marc: Yeah, me, too. That's the one I'm referring to.

Line: Yeah, definitely. And that was such a great experience looking out and basically seeing a sea of people at this committee, which was really amazing as we got back to in-person meetings.

In order to fully and adequately address the various aspects of this DEI work, CLEAR created four working groups. Let's keep with the internal focus on CLEAR for a moment and talk about the strategic outcomes and progress of the Internal Metrics and Data working group and the Advisory Panel working group. Mike, if you would, what are some of the outcomes we've already seen there?

Mike: So, one of my roles at CLEAR is I'm the chair of the internal metrics working party. That's been a really interesting journey and sort of series of conversations we've had, to think about where are we and how do we measure both where we are and our progress on our DEI journey that some of my colleagues have talked about. We're still at the early stages of that journey. And we've been thinking in the working party about how do you really measure sort of where you are in terms of DEI? And what does that mean? What does that look like?

And so, we're just about to roll out some sort of further questions we're going to ask to CLEAR participants at events and also do a scan across our various committees and working parties to look at our engagement with the CLEAR community and who's involved in CLEAR. Who attends CLEAR events? Where are we doing well? Where are the gaps where we're not attracting people, we're not reaching out to people or what we do isn't resonating with people or enabling them to feel safe enough to engage with CLEAR? So that's gonna be a really interesting set of information that comes back in the coming six to twelve months to give us a baseline on where CLEAR is really starting from.

And, as others will have said, we know this is a journey. We know this is a forever journey, but we need to know where we're starting so we can really measure how well we're progressing. And so really looking forward to seeing how that works and what that tells us. And I'm sure there'll be some really interesting surprises along the way.

And sort of coupled with that, then, is how we can help and support CLEAR members in what they're doing. And there are many, many CLEAR members - they'll all be in very different stages of the journeys that they're undertaking, in their organizations or individually, with DEI.

But obviously the first part of that has been getting our house in order, understanding where CLEAR is before we can really help others. So, we're hoping a second stage of our work will really be identifying what are good metrics to measure your progress in DEI. What works well, what works well in certain circumstances? And how can we share that with CLEAR's members? And how can they use that to help them in their journey? So that's sort of the second stage of what we're hoping to achieve with our working party is learning from our journey and sharing that with CLEAR members, so they can all come with us on that.

At the moment, what we've talked about is what we collect, why we collect it, what it'll tell us. And so, you know, we've obviously asked people involved with the various DEI committees what they think of that. We've spoken with the CLEAR board, but obviously that's just a subsection of the membership.

And as we sort of roll out the questions we're gonna ask people, it'll be interesting to see whether people feel comfortable engaging and providing answers to the questions we've asked. And I think we will look for mechanisms to get people's feedback on whether they think we're asking the right questions, whether we've missed some questions that we should have asked or could have asked. We haven't worked out quite the best way of doing that yet. As I said, we're at the sort of the early stages

of asking the first questions, and we won't get everything right. But you know we won't make progress unless we start.

So, we do want to hear from CLEAR's members as we progress through this. We want to know what's working for them. We want to know what we've missed. Because the CLEAR membership has such an amazing expertise that we'd be foolish not to tap into that. So we want to hear from all our members about how we're doing, how we can do better. And yeah, looking forward to hearing what works for people, and how we can help people better.

Line: Marc, do you have anything to add to that?

Marc: Yeah, hard to top that! That's amazing work, Michael. But maybe just some other things that I see happening. We've created a DEI charter and a commitment, a written commitment to belonging. We have a resource library. We've updated accessibility standards for CLEAR's website and its materials and resources. We have a revamped instructor application form and a new call for speaker proposals to make them more modern and relevant. We are developing right now support for CLEAR speakers who want to lean on CLEAR resources to maybe use more inclusive language and help carry the message. So, just a small snapshot of some really great tangible things that have happened so far and are continuing.

Line: It's really certainly some great work that's being done, and I'm proud to be a friend of so much work that's being done here. I know CLEAR draws on the expertise and example of other organizations that are working in this area, and hopefully CLEAR's work can now be an example to others that are starting this journey. Let's shift our focus a little bit now. In our previous conversations, Staci, you've made the important point that CLEAR wants to make sure we're not keeping this to ourselves. We want to translate CLEAR's internal DEI work into providing value for the membership. Let's talk about some of the strategic outcomes and progress of the Terminology and Connections working group and the External Resources for Regulators working group. What are some of the specific resources CLEAR is providing to its members? Phong, can you maybe address that first?

Phong: Yeah. Would be happy to, Line. Thank you for the opportunity. So just a bit of history about myself. I work up north in Alberta, Canada, and our organization at the time was also on the journey of learning about DEI. And when I joined CLEAR in 2022, the first thing that was exposed to me was the CLEAR DEI statement that was shared as a draft. And then, when I saw the statement, it resonated with the work that we're currently doing up in Canada. So, I took great interest in that, and it began my learning journey.

And then, when CLEAR and the committee created the four working groups, the working group that resonated with me the most was the Definitions & Connections working group. I took interest in that because one of the strategic directions was to help define and come up with terminologies and definitions that help members across CLEAR to be consistent and create equity in using terminologies and applying the terms and definitions. And so, through my journey, I realized that even though some

of us are using the same words and terminologies, we're not necessarily meaning the same thing or with the same intent.

So with this group, there was an opportunity for me and that working group to create a safe space for all members to be consistent and create an alignment in using those terms, for example, terms like race, diversity, socioeconomic factors, gender identity, accessibility, disability, etc., etc. When we use those terms, we don't necessarily mean the same thing. So the group took that initiative and continued to provide advice and also provided inputs to the DEI committee at CLEAR and the CLEAR board on continuing to evolve the statement in particular to make sure that it's current and it's staying applicable to the current state of DEI across the globe.

DEI is a learning journey, so it continues to evolve. We just want to make sure that the DEI commitment and statement is staying current, and then also contributing to the existing resource library that is accessible to all CLEAR members and keeping the list of definitions to stay consistent. And that may help the work in each local organization to tap into that resource as a benefit.

And then through the work also, we recognized terms like Aboriginal or First Nations that's not really being applied or accepted in the same way across the globe. So, our next item on my working group to do is try to understand that more, and trying to create a space where both terms can be used equitably across the globe. And that's very important.

The other direction that our group is also proud of working on is to provide some resources into CLEAR's mentoring program, Elevate. It's a new ask of the committee for my working group to contribute. And we started this year to contribute a few things that may help Elevate. One of them was to ask the mentor and mentees to possibly review the Australian health practitioner regulation agency's policies on DEI. They are quite ahead of most of us in that realm in creating policies and guidelines. So we provided that recommendation to Elevate as well as for mentors and mentees to review the College of Physicians and Surgeons of Alberta's strategic directions from our council, specifically on anti-discrimination, anti-racism, and the authentic Indigenous connections strategic directions. So, that may help the Elevate group to move forward as well. There was an idea that came from our working group to ask to create an opportunity at CLEAR to collect some demographic data across membership and member organizations to inform our work in collaboration with the Internal Metrics and Data work group to provide some information and insight into the work of the DEI committee at CLEAR as well as all the working groups to move forward with.

So that was our journey in my working group, Line. And we're very proud of it. There's lots more work to do, and we're still learning.

Line: That's fantastic. Well, thank you, Phong. And so, what about Daniel? What kind of external resources have you been working on?

Daniel: Hey, Line. Our team has been exceptional and very interesting. I say this because we have this privilege of working on diversity, equity, and inclusion, and our committee has members from three different continents. So just by our own representation, we are the very diversity that we speak about, and the resources that we're able to collect really speak to that. Before I get into that, I think one of the things that's very, very important to state, and certainly for any of your listeners who are just beginning the DEI journey and thinking about it, is that diversity, equity and inclusion is not about pointing fingers or laying blame. It's merely an acknowledgement that historic practices--socially, economically, politically, and legally--are no longer sustainable. And that's the platform from which we operate and [collect these resources](#). So, the type of resources we are collecting are regulators' own policies on DEI. We've asked people to collect thoughts, papers, and other documentation on the subject.

Beyond that, one of the things that we've talked about as a group is not just to collect external resources, but to recognize our own journeys. So, in our meetings we actually ask somebody to present their journey, their story, and their background as it pertains to DEI, both personally and professionally, which is a great learning experience for all of us. And as we advance in our respective meetings, it really gives us that recognition that we all have our own stories and our own histories.

We also have a question of the meeting that we ask people to go away with, and then come back and provide their own thoughts. And it's just been a tremendous. . . it's just been a really exciting exercise for all of us. The purpose of this is that we want people to access these resources. One of the questions that a lot of people ask, and Staci is so eloquent in being able to respond to this is, where do I start my DEI experience? There is no right or wrong on where you start. Start looking at what we have. This is a great platform for you to start thinking about how you become more inclusive and what is it that you want to focus on. You know there are three words within DEI - it's diversity, there's equity, and there's inclusion. But depending on where you are in the world that might change. You hear EDI, you hear DEI, you hear JEDI, because that accessibility is also one piece that's very important. So, start your journey by looking at what we have, considering it, working with other members of your team, and then start to produce your own respective journeys in this very important part of your work.

Line: Well, thank you. Excellent! It's been so great to see the morphing, if you would, of what this started out as into where it's already going, and I can see the high marks that we're setting to grow. So, thank you for all this great work and this progress on the DEI journey. And specifically thank you today, Marc, Staci, Phong, Daniel, and Michael, for sharing CLEAR's DEI story with us today.

Marc: Thank you so much, Line.

Staci: Thank you all. It's great being here and looking forward to the work ahead.

Daniel: Thanks, Line.

Phong: Thank you, Line. Thanks for the opportunity.

Mike: Thanks for having us, Line. It's been great to have a chat about where we are on our journey. And look forward to coming back and maybe speaking again in the future to tell you how we're progressing.

Line: Absolutely; it's been a pleasure. And today's conversation is really just part of the dynamic and interactive forum CLEAR wants to create for exploration of these issues. This podcast episode will be posted on the CLEAR Regulatory Network. We invite CLEAR members to share *your* DEI story with us there by posting your comments, sharing DEI resources, and asking questions to help you on your organization's DEI journey. If you haven't already joined the CLEAR Regulatory Network, I encourage you to do that. I invite you now to join and take part in these online discussions.

I also want to thank our listeners for tuning in for this episode. We'll be back with another episode of Regulation Matters: a CLEAR conversation very soon. If you're new to the CLEAR podcast, please take a moment and subscribe to us. You can find us on Podbean or any of your favorite podcast services. If you've enjoyed this podcast episode, please leave a rating or comment in the app. Your reviews help us improve our ranking and make it easier for new listeners to find us. Feel free to visit our website at www.clearhq.org for additional resources and a calendar of upcoming programs and events.

Finally, I'd like to thank our CLEAR staff, specifically Stephanie Thompson, Content Coordinator and editor for our program. Once again, I'm Line Dempsey, and I hope to be speaking to you again very soon.

The audio version of this podcast episode is available at https://podcast.clearhq.org/e/clear_dei_story/.