

LINK BY LINK

A Guide to Forming a Women's Network at Your Organization



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Certified Public Accountants | Business Consultants

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For years Moss Adams LLP has hired as many women as men. Yet women have not advanced through our ranks at the same rate, and they've left the firm in greater numbers. Our experience is by no means unique—a higher percentage of women tend to leave the accounting profession as a whole. But why?

We don't have the answer, but we know the issue needs to be tackled. That's why we launched Forum_W, our firm's effort to attract, develop, retain, and advance talented women.

The business case is clear: More women are graduating from college than men. Women are also a powerful economic force, both personally and professionally. At corporations and organizations throughout the nation, women are often key decision makers, and they're growing more influential in the boardroom.

What have we learned since kicking our efforts into high gear? First, a key factor in women's advancement is creating effective networks and learning how to leverage them. Second, efforts to advance women require strong commitment, passionate leadership, a thoughtful strategy, well-executed tactics, meaningful metrics, and, most of all, patience.

We fully believe that more women in leadership positions can drive many positive changes in the business world. Embracing leadership diversity within our organization will help us become more relevant and competitive in the marketplace.

We've compiled this strategic guide to share our experiences and help you further your efforts. We hope you'll find it a valuable resource, and we wish you success creating advancement opportunities for women in the workforce.



Tammy Young

Managing Director of Human Resources, Moss Adams LLP

WOMEN AND NETWORKS

The term *network* is used in many ways. A professional network is an informal group of people with a focus on building relationships both inside and outside an organization, while networking is the activity of growing those connections to find opportunities. A women's network, however, is a formal effort designed to improve an organization's ability to attract, develop, retain, and advance women by building their professional networks through the act of effective networking.

Over the last few decades, the development of women's networks has been an imperative for organizations wanting to retain talented women and accelerate their advancement. Some companies include only senior, high-potential women in their networks, while others are more inclusive and focus on influencing many people and shifting their organizational culture.

Benefits to an Organization

- Improves retention and advancement
- Identifies and prepares women for growth and leadership opportunities
- Increases interest from top talent outside the organization
- Advances the organization's brand
- Creates attention around diversity in leadership
- Increases dialogue about challenges women face in the workplace
- Triggers organizational self-reflection

Benefits to Women

- Provides opportunities to expand internal and external networks
- Develops leadership skills and introduces career development opportunities
- Initiates mentoring and role modeling
- Provides insight into the unwritten rules of the organization

Women join networks for many reasons, including the opportunity to:

- Make new internal and external connections
 - Seek career advancement advice
 - Satisfy their altruistic needs by sharing experience and supporting other women
-

Networks develop leadership skills and expose women to career development opportunities, professional support, and insights into the unwritten rules needed for advancement. They also increase engagement by helping employees develop stronger relationships with peers and supervisors. Exposing an organization to the importance of leadership diversity can also lead to a cultural change.

Networking Styles

Research shows that having a vast and diverse individual network positively influences career advancement through the development of informal relationships that lead to mentoring, growth opportunities, and promotions. We've also learned that it's human nature to network with those we have something in common with, including gender. Because men fill the majority of leadership roles, junior men enjoy a career advantage over junior women through these informal networks.

It's also important to note that men and women tend to have different types of business networking relationships: Women generally have smaller networks made up of deep one-to-one relationships, while men's networks are often comprised of a much greater number and wider variety of relationships where the depth of connections isn't paramount. The approach to networking generally used by men tends to provide a greater payoff in the business world.

BUILD THE BUSINESS CASE

FORUM_W BEST PRACTICE

Build the Business Case

In creating Forum_W, we determined that an inclusive network would meet our goals of not only reaching people at all levels of our firm but also shifting our organizational culture. At some point in the future, we may create another network targeted exclusively for senior, high-potential women.

Building a compelling business case is the foundation of gaining support for starting a women's network. An effective business case communicates how the network will positively impact your organization and the issues and trends affecting women in your organization and industry.

Describe what's occurring in your business environment and the industry, and use metrics and research to validate your business case. Cover topics such as:

- The value diversity brings to the workplace and leadership
- Why women stay or leave the workforce and your industry
- Best practices to attract, develop, retain, and advance women

Analyze Your Metrics

Metrics say a lot about your organization, and it's difficult to dispute hard facts. Adding metrics strengthens your business case.

HEADCOUNT

- How successful is your organization in attracting women?
- In what roles are there more men than women and more women than men?

RETENTION

- Are men and women leaving at different rates?
- What is the retention rate in each business unit and level?

WOMEN IN LEADERSHIP

- What representation do women have in leadership roles?

LEADERSHIP PIPELINE

- Does the advancement of women stall at a certain level?
 - Is the number of leadership-ready women increasing, stalled, or decreasing?
 - Do women receive the same opportunities and assignments as men?
-

See [page 17](#) for a list of suggested reading material covering women in the workplace.

BUILD THE BUSINESS CASE *continued*

FORUM_W BEST PRACTICE *Leaders as Advocates*

Forum_W is one of our firm's top strategic objectives: Our top executives believe in the business case, and we use their support to actively engage and gain support from other key leaders.

FORUM_W BEST PRACTICE *Make the Business Case*

In the first six months of launching Forum_W, we presented the business case dozens of times throughout the firm and held hundreds of individual conversations on the topic. Presenters used prepared slides and talking points to ensure a consistent message was communicated, and firm-wide e-mail messages and intranet articles supported their efforts.

Gain Leadership Support

Successful networks need support from top leadership and influential individuals. Key steps in gaining this support include:

- Ensuring top leadership vocalizes its support for a women's network to all leadership levels
- Finding respected and supportive individuals to help advance the business case
- Preparing executives to address potential resistance, especially at the mid-management levels

If your leaders aren't fully supportive, you'll have more work to do. Pursue other approaches such as connecting them with leaders in other organizations where a women's network has made a positive impact.

Communicate the Business Case

Share your findings and use the most effective communication methods available, such as formal presentations, word of mouth, e-mail, and your intranet site.



BUILD THE BUSINESS CASE

CREATE THE NETWORK VISION

FORUM_W BEST PRACTICE

Align the Network's Name

We chose to name our network Forum_W because the *W* emphasizes women and *forum* represents the goals established in our mission statement: collaboration, ongoing dialogue, and a sense of community.

FORUM_W BEST PRACTICE

Mission Statement and Priorities

The objective of Forum_W is to accelerate the firm's success in attracting, developing, retaining, and advancing talented women.

FORUM_W PRIORITIES

Dialogue. Listen to women regarding their career goals and experiences.

Networking. Establish a solid foundation of relationships inside and outside the firm.

Mentoring. Connect those who are developing with those who have already achieved.

Advancement. Provide ample growth opportunities, encourage the pursuit of leadership roles, and ensure that no cultural barriers inhibit success.

The Forum_W mission and priorities purposely do not focus on work-life balance issues or flexible work programs. These issues apply to all people at Moss Adams, not just women, and are addressed separately.

Your network's name should reflect its purpose and be easily understood. Use the name consistently to build recognition. As you develop your network's brand, make sure all its elements—the words, images, and designs—project positive and dynamic energy.

Establish a Mission and Priorities

The mission statement identifies priorities and frames how your network will reach its goals. It ensures that the purpose and intent of your network remains in focus. Before defining your mission and priorities, consider the needs you want to address and the desired outcomes.

Your mission statement should:

- Make the business case clear
- Be easily articulated
- Use carefully chosen language to describe goals and activities
- Be flexible to adapt to needs that may evolve with time

It's important to determine what focus your network will and will not have. Constantly measure your efforts against your mission. Your network will gain credibility when actions mirror your mission statement and priorities.

FORUM_W BEST PRACTICE *Define Goals*

We segmented our goals into stages and believe this will ensure that our network promise can be delivered.

Short-term goal: activity, visibility, and participation

Success meant establishing our women's network in each office, generating interest and participation in network activities, and engaging women in a meaningful dialogue about their skills, goals, and experiences at Moss Adams.

Midterm goal: personal growth, professional network expansion, and increased dialogue

Success is measured by women's satisfaction with the quantity and quality of the mentoring they receive, the extent to which their personal networks are expanding, and their advancement into leadership roles.

Long-term goal: retention, advancement, and sustained cultural change

We define success as an increase in the retention and advancement of women and the degree to which Forum_W is embedded in the firm's culture.

CREATE THE NETWORK VISION *continued*

Establish Your Network's Goals

Goals drive strategy. Create goals that reflect the progress you'd like to make at different stages of your network's maturity. Short-term goals will likely focus on process and activity, midterm goals generally cover experience and analysis, and long-term goals are concerned with results.

CREATE THE NETWORK VISION



ESTABLISH NETWORK LEADERSHIP

FORUM_W BEST PRACTICE *Sponsors*

We selected sponsors across the firm to ensure network visibility and adequate buy-in at every level. The CEO and COO are sponsors firm wide, and office managing partners serve as sponsors at their locations.

FORUM_W BEST PRACTICE *An Advisory Board*

Our board consists of nine partners and several leaders from human resources. Serving on the board is considered an honor and a leadership role. Each member was chosen because of his or her passion for the advancement of women and their ability to influence change.

FORUM_W BEST PRACTICE *Time to Plan*

The first Forum_W board meeting was an all-day session and a chance to gain a common understanding of the challenges and opportunities surrounding women at Moss Adams. It was also when we started developing our strategy and goals.

See page 20 to find a sample Forum_W advisory board meeting agenda.

Creating a leadership group or board to lead the network for the entire organization is a critical step because the group can ensure consistent and focused attention. Select board members based on their ability to think strategically, influence others, act as role models, and facilitate change.

Board Roles and Responsibilities

A women's network benefits from a clearly defined structure with specific roles and responsibilities. The board provides thought leadership and is an advocate of the business case and network activities. This approach minimizes duplication of effort and increases accountability.

Every organization is unique, and board responsibilities will vary based on your organization's needs. The board should provide strategic guidance and constantly try to understand how the network is perceived and accepted in the organization. To sustain a board, every member must commit to regular attendance and active participation.

One of the most important roles your board members will play is liaising with subsets of the women's networks in the different business units or locations. They'll be the connection between the organizational strategy and the ground-level execution. Liaisons provide guidance to networks to keep efforts on track and in line with the overall vision, mission, and goals.

See page 19 for suggested advisory board responsibilities.

Host the First Board Meeting

Schedule enough time to fully develop a strategy and explore the benefits and potential challenges you may face in building a women's network in your organization.

ESTABLISH NETWORK LEADERSHIP *continued*

FORUM_W BEST PRACTICE *Office Champions*

We call our office network leaders “office champions.” Each Forum_W advisory board member, in their role as office liaison, collaborated with office leadership to select two champions to direct and lead that office’s Forum_W network. We found two to be the magic number as two minds can spark creativity but more can create a lack of accountability. We found the most effective pairs should:

- Include at least one high-level individual and one woman (who may be the same person)
- Be seen as supporters of diversity in leadership and proponents of career development
- Believe in the network’s business case
- Be influencers

An ideal steering committee meets on a monthly basis and contains six to eight members.

Select Network Leaders and Establish Steering Committees

Managing a formal women’s network across multiple locations is a challenge. If your organization operates out of more than one site, select individuals to lead the network in each location and support them with a steering committee and a liaison from the board. Each location’s steering committee, led by the network leaders, is responsible for executing its office (or business unit) strategy and facilitating related events. The steering committee should be a diverse representation of the office population, with members from different business units, levels, genders, and ethnic backgrounds.

A successful women’s network is promoted and supported across the organization, but real results occur because of communication, leadership, and action at the location (or business unit) level. Each network location should tailor events and programming to the needs of the women who work at that location.

See page 18 to find a sample organizational chart.

ESTABLISH NETWORK LEADERSHIP



FORUM_W BEST PRACTICE
An Office Pilot

Office champions in pilot offices were given a tool kit to prepare for presenting the business case, selecting steering committees, and running a network kickoff event. They received one-on-one coaching from their advisory board liaison and assistance from human resources during the planning process.

Our pilots created many best practices for future kickoff events:

- Invite employees from all levels, but restrict kickoff event activities to only women. This makes it more likely that women will share their concerns openly with each other.
- Host the event off-site to reflect its importance and create a neutral environment.
- Maximize attendance by promoting the event and extending personal invitations.
- Communicate a consistent organization-wide business-case message to establish the network's importance, but customize all other material to fit local needs.
- Kick off the event with a supportive welcome from leadership. If the office, business unit, and network leaders are male, they should depart after they greet attendees.
- Conduct a prelaunch survey to understand the concerns of women in your office.
- Conduct a postlaunch survey to measure the reaction to the launch event and direct your programming.

LAUNCH YOUR NETWORK

Officially launch your networks in each location (or business unit) with a kickoff event to set an appropriate tone. Everyone should leave the event energized, inspired, and with a clear understanding of the mission. At the event you'll want to present the business case, and then break into small groups to discuss women's unique career needs and how a network can help them.

See page 22 for a sample launch event agenda.

Use pilot launches to build momentum and establish internal best practices for your network. Pilots in a handful of offices or business units allow you to test your approach, make adjustments, and identify best practices before you launch all your networks.

Host a Network Leader Meeting

The concept of being a network leader will be new to everyone. To increase the success of the network launches, bring the network leaders together for a full day of learning and dialogue. Use the meeting to share resources and focus on the business case and network leader responsibilities.

LAUNCH YOUR NETWORK



SUSTAIN THE NETWORK

FORUM_W BEST PRACTICE *Champion Development*

Four months after the pilot networks launched, our advisory board hosted a champions meeting to provide tools and resources needed to launch the remaining networks. The aim was to:

- Promote interaction between champions
- Build excitement for Forum_W and launch events
- Help new champions effectively present the business case
- Explore and share best practices from the industry and our pilot programs

See [page 21](#) for an office champion meeting agenda.

Network leader meetings and kickoff events create excitement. The key is maintaining energy and momentum to sustain network growth. Stay relevant by ensuring activities support the mission and long-term goals of the network and the organization. Visibility will establish credibility and increase support.

Network Leadership Meetings



NETWORK BOARD

- Quarterly in-person meetings to discuss progress and develop long-term strategies
- Monthly conference calls to discuss progress
- Monthly meetings with network leaders to discuss efforts, challenges, and resources
- Quarterly meetings with office leadership that covers efforts, successes, and concerns
- Monthly report to the company's top executives



NETWORK LEADERS

- Monthly conference calls hosted by the network's board to share best practices, external research, thought leadership, updates, and organization-wide efforts



OFFICE NETWORK STEERING COMMITTEE

- Monthly meetings to discuss network status, issues affecting the office, calendar of activities, and strategy progress

Events and Programs

Encourage network leaders and steering committees to develop and host activities that promote learning, sharing of information, and building connections. Event promotional material should communicate the purpose and how it relates to the network's mission.

FORUM_W BEST PRACTICE *Sharing Information and Ideas*

We created an intranet site for our advisory board and office champions to share best practices, program ideas, and related resources. The site includes a program and event library of great ideas developed in each office. After each successful event, champions post the program's summary, outline, agenda, and supporting material.

FORUM_W BEST PRACTICE *Demonstrate Commitment*

We're often asked to show our long-term commitment to Forum_W and prove its importance. Our advisory board addressed this by asking each office to publish a rolling 12-month calendar of events so personnel could understand how the strategy was being put into action. This long-term view helped employees understand that Forum_W was here to stay and not just the "flavor of the month."

See [page 22](#) for a sample rolling event calendar.

SUSTAIN THE NETWORK *continued*

All events should have a business purpose. Consider the following areas of focus:



EDUCATION

- Share key attributes of success
- Focus on skill development activities
- Share external research to create a better understanding of the business case and issues



NETWORKING

- Build strong networks through internal, external, and alumni networking opportunities
- Gain visibility and access to mentors within the organization through internal networks
- Leverage external networks to build connections that can lead to business opportunities



MENTORING

- Understand the benefits of mentoring
- Encourage women to seek mentors
- Develop relationships that may lead to mentoring
- Provide tools and resources needed to create meaningful mentoring relationships



COMMUNITY SERVICE

- Serve the internal and external community and fulfill the needs of those who wish to make a difference
- Establish meaningful relationships that contribute to the growth of an individual's network
- Enhance the organization's reputation

Segment Programming

Women-only events and activities are necessary for your women's network to help provide a comfortable environment to engage in dialogue about careers and experiences with the organization. It's also important to create opportunities for inclusive involvement, organized for specific groups:

- Men and women at all levels
- Women at all levels
- Men
- Specific levels—nonmanagement, management, and executive
- Types of roles and business units

Meaningful events connected to the business case build credibility. It's better to host fewer high-quality events than many poorly attended ones.

SUSTAIN THE NETWORK *continued*

FORUM_W BEST PRACTICE Messages

Messages we sent to specific groups about Forum_W:

ENTIRE ORGANIZATION

- The business case for a women's network
- Our long-term commitment to advancing women
- Our progress and what to expect next (annual report)

ALL WOMEN

- The career-development value of a women's network and encouragement to participate in future events

WOMEN LEADERS

- The importance of their involvement and commitment to mentoring junior women

LEADERSHIP

- The positive business impact made by the network
- The importance of:
 - Supporting and mentoring women
 - Showing public support and commitment
 - Sharing related success stories
 - Research and thought leadership

Communicate on a Regular Basis

Create a streamlined and easy-to-reference communication plan. Include information about your target audience, priorities, and activities—including who is responsible for each activity and when it needs to be completed.

Keeping the organization updated sends the message that your women's network is here to stay. Establish a schedule to ensure your organization stays up to date but is not overwhelmed with communication. Topics to share include:

- Significant network accomplishments
- Progress toward your network's goals
- Your women's achievements—these will inspire other women and are opportunities to recognize talented women in the organization
- Upcoming events
- Event recaps and updates

Tailor Your Message

Targeting certain populations with specific messages can be very effective. Some groups to send focused messages to include:

- The entire organization
- Leadership
- Women leaders
- Office or business unit leadership
- Future women leaders
- All men
- All women
- Supervisors and mentors of women
- Potential employees

Involve New Employees

Providing new employees with a network welcome kit can get them involved quickly. The kit can cover network material, including:

- Mission, goals, and priorities
- History of activities and major accomplishments
- Information about how to get more involved
- Calendar of upcoming activities

FORUM_W BEST PRACTICE Measurement

We publish an annual report to share our progress and recognize the accomplishments of women at Moss Adams. Annual reports are useful to:

- Regularly communicate progress internally and externally
- Increase accountability and keep focus on executing stated strategies

See [page 23](#) for the *Forum_W* scorecard.

[Click below to view our annual reports.](#)

2011

2010

2009

[www.MossAdams.com/
ForumForWomenInsights](http://www.MossAdams.com/ForumForWomenInsights)

SUSTAIN THE NETWORK *continued*

Keep Score

Use metrics as a tool to drive change. Since cultural change takes time and all change begins with activity, it's important to track your network's activity. Track, measure, and consistently report your network's growth and impact. Consider tracking the following metrics:

- Number of events
- Attendance at events
- Feedback from events
- Women's achievements at your organization
- Network achievements
- Awards received by the network and company

Involve Men

Commitment from men is critical to developing a successful women's network. Include men at selected events so they can learn about the challenges women face advancing in the workforce. If there's any resistance, host a launch event for men to ask questions about the business case and discuss their concerns.

See [pages 17 and 26](#) for more information on engaging men in diversity efforts.

Define Leadership Periods

Leading a network adds to an already demanding workload; volunteers are more likely to participate if they know it's for a defined period of time. A leadership succession plan keeps leaders engaged and energized and provides opportunities for others to get involved.

Succession planning ensures the transfer of institutional knowledge and maintains momentum and growth. Best practices include:

- Define term lengths
- Overlap terms so experienced leaders can mentor new ones
- Identify and recruit future board members early

Keep the Strategy Fresh

As your network evolves, so should your approach. Tap into conferences and outside research, and network with other organizations. After your networks are established, focus your efforts externally to take them to the next level. Start building external networks and business development opportunities, and giving back to the community.

FORUM_W BEST PRACTICE
Focus on Research

We keep up to date on the most current research, including blogs, articles, and activity reports from other organizations.

See *page 17* for a list of resources.

We're dedicated to the advancement of women in the profession, and we've sponsored meaningful research (the Accounting MOVE Project), events, and efforts to promote women in our industry.

Click below for the Accounting MOVE Project executive reports.

www.MossAdams.com/ForumForWomenImpact

SUSTAIN THE NETWORK *continued*

Create Lasting Change

The ultimate goal when implementing a women's network is to create lasting cultural change in your organization. It may be a while before the underlying cultural challenges that stall the advancement of women in your organization reveal themselves. Finding ways to discuss and address those challenges are the key to fostering change. Always keep in mind that this will be a long-term investment. Stay focused on your mission and goals and building positive momentum.

Start Today

We hope you find this information valuable. To help you get started right away, we've included a resource addendum that begins on the next page. If you have any questions or ideas to share, contact us at forum_w@mossadams.com.

SUSTAIN THE NETWORK



FORUM_W | RESOURCE ADDENDUM

A Checklist for Starting Your Women's Network

Prepare the groundwork

- ☐ Build a strong business case
- ☐ Analyze your organization's metrics
- ☐ Gain leadership support
- ☐ Communicate the business case

Create a network vision

- ☐ Establish the mission and priorities
- ☐ Establish the network goals
- ☐ Name the network

Establish network leadership

- ☐ Establish an advisory board
- ☐ Define roles and responsibilities
- ☐ Host your leadership group meeting
- ☐ Identify network leaders and steering committee members
- ☐ Select pilot offices for the first network launches
- ☐ Host a network leader meeting
- ☐ Launch remaining office networks with kickoff events

Manage the network

- ☐ Schedule regular network board meetings
- ☐ Host events that have a business purpose and fit the goals and priorities of the network
- ☐ Create and maintain a rolling long-term event calendar
- ☐ Create and execute your communication plan
- ☐ Track, measure, and report your network's progress

Suggested Reading List: Business Environment and Industry Trends

FORUM_W MATERIALS Annual Reports and Videos

Click below to view.

2011

Harvard Business Review

- Sylvia Ann Hewlett and Carolyn Buck Luce, "Off-ramps and On-ramps: Keeping Talented Women on the Road to Success," *Harvard Business Review*, March 2005.
- Alice H. Eagly and Linda L. Carli, "Women and the Labyrinth of Leadership," *Harvard Business Review*, September 2007.
- Anna Fels, "Do Women Lack Ambition?" *Harvard Business Review*, March 2009.
- Herminia Ibarra, Nancy M. Carter, and Christine Silva, "Why Men Still Get More Promotions Than Women," *Harvard Business Review*, September 2010.

American Institute of Certified Public Accountants

- "Share. Learn. Grow. Mentor: A How-to Guide from the AICPA's Women's Initiatives Executive Committee," *AICPA*, 2008.
- Mary L. Bennett, "The Attraction, Retention and Advancement of Women Leaders: Strategies for Organizational Sustainability," *AICPA*, 2010.

The McKinsey Quarterly

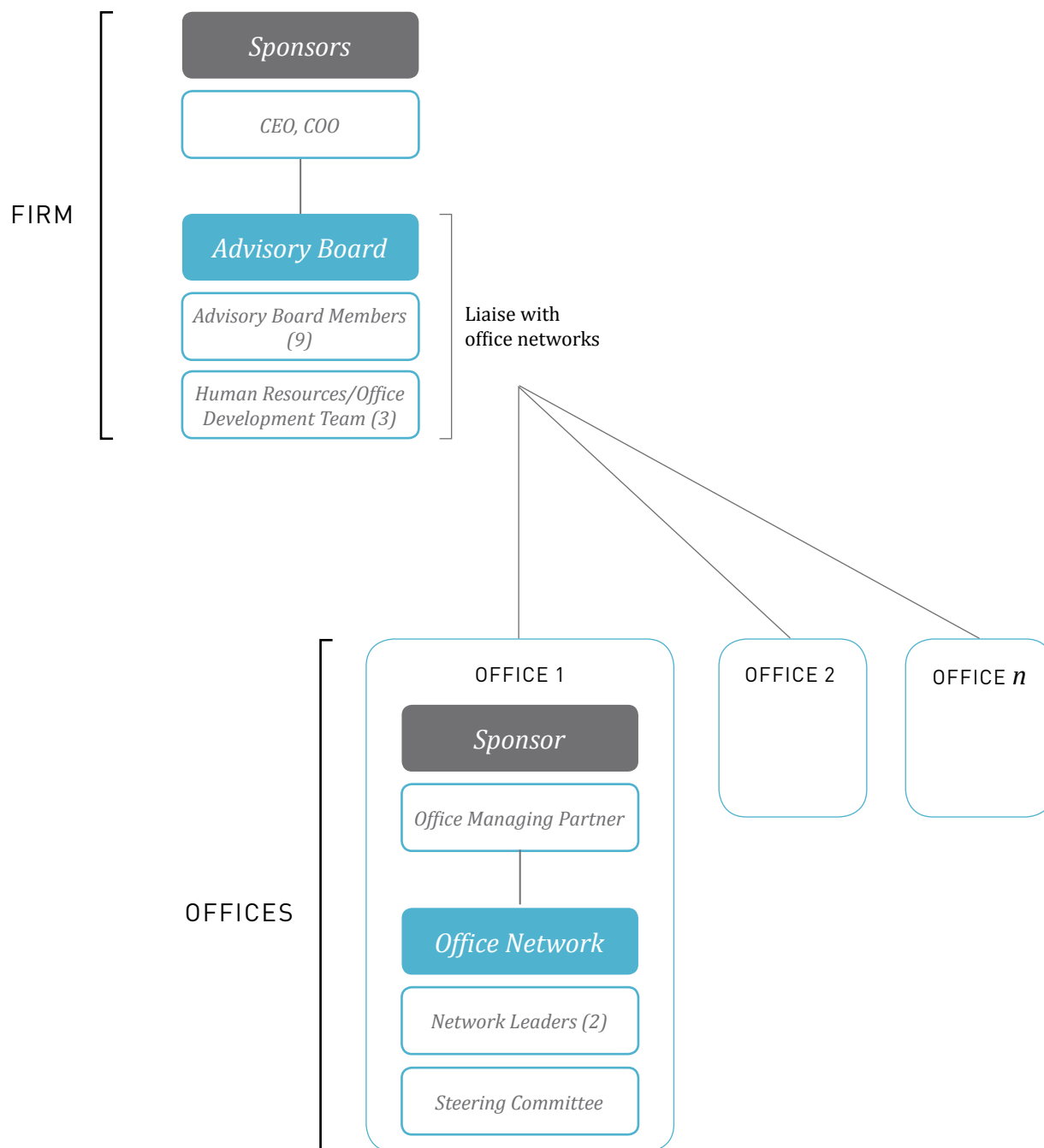
- Georges Desvaux, Sandrine Devillard-Hoellinger, and Mary C. Meaney, "A Business Case for Women," *The McKinsey Quarterly*, September 2008.
- Joanna Barsh, Susie Cranston, and Rebecca A. Caske, "Centered Leadership: How Talented Women Thrive," *The McKinsey Quarterly*, 2008, Number 4.
- Charlotte Werner, Sandrine Devillard, and Sandra Sancier-Sultan, "Moving Women to the Top," *McKinsey Quarterly*, 2010.
- Joanna Barsh and Lareina Yee, Chang, "Changing Companies' Minds About Women," *McKinsey Quarterly*, September 2011.

Catalyst

- "The Double-Bind Dilemma for Women in Leadership: Damned If You Do, Doomed If You Don't," *Catalyst*, July 2007.
- Laura Sabattini, *Unwritten Rules: What You Don't Know Can Hurt Your Career* (Catalyst, June 2008).
- Jeanine Prime and Corinne A. Moss-Racusin, "Engaging Men in Gender Initiatives: What Change Agents Need to Know," *Catalyst*, December 2009.
- Jeanine Prime, Corinne A. Moss-Racusin, and Heather Foust-Cummings, "Engaging Men in Gender Initiatives: Stacking the Deck for Success," *Catalyst*, December 2009.
- Laura Sabattini and Sarah Dinolfo, "Unwritten Rules: Why Doing a Good Job Might Not Be Enough," *Catalyst*, February 2010.
- Jennifer Kohler, Sarah Dinolfo, Heather Foust-Cummings, *Fostering Sponsorship Success Among High Performers and Leaders* (Catalyst, August 2011).
- Heather Foust-Cummings, Sarah Dinolfo, and Jennifer Kohler, "Sponsoring Women to Success," *Catalyst*, August 2011.
- Nancy M. Carter, Christine Silva, "The Myth of the Ideal Worker: Does Doing All the Right Things Really Get Women Ahead?" *Catalyst*, 2011.

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ForumForWomenInsights](http://www.MossAdams.com/ForumForWomenInsights)

Forum_W Best Practice Organizational Chart



Network Leadership Roles and Responsibilities

| | Network Advisory Board | Network Leaders and Steering Committees | Office (or Business Leadership) |
|----------------------|---|---|--|
| OVERALL | <ul style="list-style-type: none"> • Provide thought leadership • Participate in calls and quarterly meetings • Champion business case and activities to firm <p><i>Office Liaison</i></p> <ul style="list-style-type: none"> • Serve as liaison to two to three office networks • Communicate with office champions monthly | <p><i>Network Leaders</i></p> <ul style="list-style-type: none"> • Direct and energize the network <p><i>Steering Committees</i></p> <ul style="list-style-type: none"> • Host at least four relevant events per year • Provide mentoring and support to women • Utilize resources provided by advisory board • Champion business case and activities to all employees | <ul style="list-style-type: none"> • Serve as executive sponsor of network and visibly support activities • Provide mentoring and support to women • Discuss and act on suggestions from steering committee • Champion business case and activities to all employees |
| MEETINGS | <ul style="list-style-type: none"> • Monthly board calls • Quarterly in-person board meetings • Regular subcommittee meetings and calls <p><i>Office Liaison</i></p> <ul style="list-style-type: none"> • At least one annual event in each office • Quarterly meetings to discuss ongoing strategy • Monthly calls with network leader | <p><i>Network Leaders</i></p> <ul style="list-style-type: none"> • Update network leadership quarterly on progress with office liaison and office leadership • Monthly calls with office liaison • Monthly network leader calls <p><i>Steering Committees</i></p> <ul style="list-style-type: none"> • Monthly steering committee meetings • Regular network events | <ul style="list-style-type: none"> • Steering committee meetings as needed • Quarterly calls with liaison • Quarterly meetings with champions |
| PROGRAMS | <ul style="list-style-type: none"> • Identify programs supporting education, mentoring, networking, and community service • Develop resources and programs for steering committees <p><i>Office Liaison</i></p> <ul style="list-style-type: none"> • Guide network leaders and steering committees on how to effectively implement programs and activities | <ul style="list-style-type: none"> • Implement network programs and activities • Segment programming to address population needs • Utilize program materials provided by board • Provide feedback and suggestions on program materials | <ul style="list-style-type: none"> • Support and promote programs and activities • Attend network programs and events |
| COMMUNICATION | <ul style="list-style-type: none"> • Develop and oversee communication strategy <p><i>Office Liaison</i></p> <ul style="list-style-type: none"> • Assist network leaders with strategy • Provide feedback to office leaders • Seek opportunities for external recognition • Understand office challenges and culture | <ul style="list-style-type: none"> • Develop office communications plan • Keep network visible for all employees, especially women • Provide regular updates on progress to liaison and leadership • Network with other steering committees • Seek opportunities for external recognition | <ul style="list-style-type: none"> • Communicate the business case to all employees • Provide visible support to office steering committee and network • Provide regular input to office steering committee and network leaders • Provide regular input to liaison |
| METRICS | <ul style="list-style-type: none"> • Participate in development and improvement of metrics and scorecard • Actively monitor metrics <p><i>Office Liaison</i></p> <ul style="list-style-type: none"> • Actively monitor and provide guidance | <ul style="list-style-type: none"> • Measure, summarize, and communicate progress to network, office, and liaison • Submit event metrics to track participation • Develop and share best practices for increasing participation in events and activities | <ul style="list-style-type: none"> • Team with steering committee to monitor and create action on office metrics • Work with steering committee to increase mentoring |

First Forum_W Advisory Board Meeting Agenda

We held a full-day meeting focused on the business case and strategy.

Laying the Foundation

- History of the firm's efforts to attract, develop, retain, and advance women
- Advisory board objectives
- Present realities
 - Firm demographics
 - Research on women in business

Aspirational Brainstorming

- Outcome of Forum_W over one-, three-, and five-year periods and beyond

Best Practices from the Marketplace

- Best practices
 - Networking
 - Mentoring
 - Leadership programs for high-potential women
 - Network development and structure

Tactical Brainstorming

- What's our implementation strategy?
- What are our one-, three-, and five-year plans?
 - How should we start?
 - What programs do we have the bandwidth to support and roll out?
- Pilot launch

Structure, Roles, and Responsibilities

- Firm-wide
- Local office

Next Steps

- Subcommittee assignments
- Action plan for the next 12 months

Forum_W Office Champion Meeting

We held an all-day meeting to prepare office champions to lead their networks. We discussed the business case and provided best practices from our pilot network launches and other organizations.

Panel Discussion

A panel discussion featured advisory board members, HR leadership, pilot-office champions, and a leader with prior women's network experience. The panel addressed questions such as:

- Is Forum_W about quotas?
- What does this mean for the men in the firm?
- What will a successful network look like?

Breakout Sessions

Each champion attended three smaller breakout sessions designed to provide direction and encourage active discussion. The topics included:

- Covering the necessary tools to implement a successful office launch
- Understanding the difference between networking and a women's network
- Discussing event ideas that support our mission and priorities (mentoring, community service, networking, and education) and how to sustain them

Champion Tool Kit

All champions received a resource tool kit to jump-start the process of building their office network. The tool kit included:

- A slide deck outlining the business case
- A guide to communicating the business case
- A step-by-step launch event planning guide
- Information on the benefits of mentoring and networking
- Program and event ideas
- Research and articles to reinforce the business case
- External best practices

Resource Fair

An event was held to display related and available reference tools:

- Material from Catalyst, the American Institute of Certified Public Accountants, the *Harvard Business Review*, *McKinsey Quarterly*, and the HR Leadership Council
- Books related to supporting the business case, mentoring, networking, and work-life balance

Sample Network Kickoff Event Agenda

Learn more about women's needs at your organization and gain support for each network. Office champions should use resources from their meeting to create the strategy.

| | |
|-------------------|---|
| 30 MINUTES | Networking |
| 15 MINUTES | Welcome by champions and office leaders |
| 15 MINUTES | Icebreaker |
| 30 MINUTES | The business case |
| 45 MINUTES | Table discussion topics <ul style="list-style-type: none"> • What can the organization do to support women? • What do you want to gain from our women's network? • What challenges do you face in your career? |
| 15 MINUTES | Closing remarks and questions |

Sample Rolling Calendar

A rolling calendar can show commitment to office networks. Organized monthly or quarterly, the calendar needs to be updated on a regular basis to show that efforts are moving forward. Sample events relate to networking.

| | | | |
|------|----------------|-----------|---|
| 2011 | FIRST QUARTER | January | PRESENTATION The Importance of Networking |
| | | February | Dress for Success, "Send One Suit" event with three local law firms |
| | SECOND QUARTER | April | WORKSHOP Developing Your Personal Brand |
| | | June | Susan G. Komen Race for the Cure |
| | THIRD QUARTER | July | WORKSHOP Building Your Networking Skills |
| | | September | PRESENTATION Understanding Different Communication Styles |
| | FOURTH QUARTER | November | WORKSHOP Leveraging Your Internal Network |
| | FIRST QUARTER | January | BROWN BAG LUNCH Developing your External Network |

Sample Network Scorecard

Use metrics to drive accountability and track progress. Make sure activities align with your network's goals and mission. Scorecards can be used to track both organization-wide and office metrics.

| Metric Category | Metric Frequency | Source | Short-Term (2009–2010) | | Mid-Term (2011–2013) | | Long-Term (2014–beyond) | |
|--|------------------|---------------------------|------------------------|---------------------------|----------------------|----------------|-------------------------|-----------------------------|
| | | | Actual | Goal | Actual | Goal | Actual | Goal |
| IMPACT | | | | | | | | |
| Establish network with quarterly events and reporting compliance | Annual | Liaisons | | All offices in compliance | | | | |
| Program feedback | Annual | Engagement survey | | Baseline | | Positive trend | | Positive trend |
| External events | Annual | Attendance tracking | | | | Two per year | | Three per year |
| PARTICIPATION | | | | | | | | |
| Participating in activities | Annual | Attendance tracking | | Measure | | | | |
| MENTORING | | | | | | | | |
| With identified mentoring relationships | Annual | Mentoring assessments | | Measure | | | | |
| Satisfied with mentoring | Annual | Engagement survey | | | | Positive trend | | 75% overall 85% managers |
| NETWORKING | | | | | | | | |
| Feedback on whether personal network has expanded | Annual | Survey | | | | Positive trend | | Positive trend |
| PERFORMANCE | | | | | | | | |
| Women’s rating versus all ratings | Semiannual | Performance reviews | | Measure | | Positive trend | | Equal |
| ADVANCEMENT | | | | | | | | |
| In partner pipeline | Annual | Analysis spreadsheet | | Measure | | Positive trend | | Equal to men |
| Developed for leadership roles | Annual | Firm or office leadership | | | | Positive trend | | Equal to men |
| Considered for leadership roles | Annual | Firm or office leadership | | | | Positive trend | | Equal to men |
| In leadership roles | Annual | Leadership matrix | | | | Positive trend | | Equal to men |
| ENGAGEMENT | | | | | | | | |
| Intent to stay | Annual | Engagement survey | | | | Positive trend | | Equal to men |
| Retention of women | Quarterly | Turnover reports | | | | Positive trend | | Equal to men |

Sample Forum_W Articles on Moss Adams Intranet

FORUM_W GAINS MOMENTUM

by Valerie Allen, Brian Conner, and Rebecca Pomeroy, Forum_W Advisory Board Members

ARTICLES

24 Forum_W Gains Momentum

This article was released when Forum_W was launched firm-wide. It covers the structure of our networks and why we chose to start our focus on diversity with women.

26 Forum_W ...For Men

We found it necessary to address how Forum_W benefits men and how their support plays a role in the success of our efforts.

27 Forum_W Continues to Make a Difference

In conjunction with the release of our Forum_W annual reports, we provide a firm-wide update on our accomplishments throughout the year and priorities for the upcoming year.

What Is Forum_W?

Forum_W focuses on attracting, developing, retaining, and advancing talented women. Initial Forum_W activities will encourage dialogue and be directed at women. In the long term, Forum_W will grow to include mentoring, building relationships, supporting leadership advancement, and education for both women and men.

Core to Forum_W is how best to support women in their career journeys. Although we can make some progress on a firm-wide level, local office dialogue, ideas, and implementation are critical to the program's success. Women succeed and flourish within the environment of their local offices.

Forum_W Office Networks

Beginning in December 2008, we'll launch Forum_W networks in three pilot offices: Portland, Spokane, and Orange County. Activities at launch events will include social interaction, a presentation by local office leaders, and time for discussion and brainstorming. Networks will launch in our other offices by June 2009. In some offices, the Forum_W network will supplement existing activities focused on women. In others, this will be a new experience.

Participation and engagement will be individualized. Women confident about their careers and professional achievements might be best suited for network leadership and mentor roles. Those who successfully juggle family and professional demands could be a valuable resource to women with young children or those considering a future that includes family. Others will benefit from career-planning assistance that furthers understanding of firm opportunities and how to access them. Men can contribute to and advance the dialogue. Their support for Forum_W and recognition of the competitive advantages the initiative brings will reinforce its success.

What's in a Name?

Much thought and discussion has gone into Forum_W, beginning with the name. The word *forum* was chosen to represent collaboration, ongoing dialogue, and a sense of community—all goals of the program. The *w* reflects a specific emphasis on women.

Why Women?

Long-term success depends on the firm's ability to attract, develop, and retain a team of outstanding professionals. Fostering a welcoming and supportive

environment and embracing diversity (in backgrounds, skills, and styles) are paramount to our success in attracting the best and brightest professionals and in keeping them engaged and focused on building their careers with us.

Several years ago, we chose to begin our focus on diversity with women. More than half of our entry-level hires are women, but our attrition is much higher among them than men. Despite the rate at which we've hired women for many years, only 20 percent of our partners are women. Coupled with this challenge, the role women play in the business world is transforming. In our clients' offices, women have more seats at the table. Women are increasingly our buyers. It's clear we need to keep pace. Improving our retention and advancement of women is critical to our long-term success.

A consistent theme of our Forum_W efforts will be to recognize and embrace the value of different perspectives and styles. For example, in recent years the business world has witnessed a morphing of leadership styles. Successful leaders today are as likely to display the consensus-driven style typically associated with women as they are the command-and-control approach associated with the male-dominated business world of decades past. Our challenge is to continue to adjust the lens through which we view leaders and advance qualified people into leadership roles even if their leadership style is different from that of their predecessors.

Forum_W is not an overnight solution. Rather, it will be an organic process and will evolve over time. Progress will be incremental and measured over the long term based on our success in attracting, developing, retaining, and advancing women.

Forum_W Leaders

Each office will have Forum_W champions and a steering committee to meet its unique needs. On a firm-wide basis, the advisory board listed below is providing direction and thought leadership to Forum_W. If you have questions about Forum_W or are interested in providing feedback on our leadership, please contact one of the individuals listed below.

Forum_W Advisory Board

| | |
|---|---|
| Valerie Allen, Albuquerque | Rebecca Pomeroy, Wealth Advisors, Seattle |
| Tricia Bencich, Administrative | Ty Pforsich, Santa Rosa |
| Cheri Burnham, Spokane | Chris Schmidt, Administrative |
| Mary Case, Eugene | Andy Warren, Orange County |
| Brian Conner, California Central Valley | Russ Wilson, Bellingham |
| Noni LaLone, Everett | Tammy Young, Administrative |

FORUM_W... FOR MEN

by Chris Schmidt, President & COO

Forum_W, the Moss Adams forum for women, kicked off in January 2009 with launch events in three pilot offices. Forum_W will roll out to the entire firm this spring, with launch events in all offices targeted for early summer. So what does this mean for men in the firm?

The mission of Forum_W is to increase our success in attracting, developing, retaining, and advancing women through each level. Although roughly half of our entry-level hires have been women for many years, only 20 percent of our partners are women.

For men, it can be easy to oversimplify this challenge as a family-balance or child care issue, thinking that is what pulls women away from the firm. It's not that simple. Family balance and child care are issues that both women and men face, and contemporary research indicates that the issue of women leaving the workplace is much broader and more complex.

Alongside pull factors such as family, there are push factors, features of the job or workplace that make women head for the door. Research shows that understimulation and lack of opportunity seem to be strong push factors, especially in our business environment. In most cases, these push factors are different for men and women. Forum_W will help us better understand and address the push and pull factors women face.

Certain aspects of Forum_W will include women-only events and activities. Other aspects will involve everyone in the firm. Men will play a role in the success of Forum_W as well as women. We encourage everyone to support the formation of women's networks in the offices, listen to what the networks have to say, and have an open dialogue with those involved.

As this dialogue begins, don't expect quick answers—the solutions are different for everyone. Our goal is to address the common themes where possible and engage on individual issues where appropriate.

Ultimately, we all benefit from the mission of Forum_W. As you know, in our profession we're only as successful as the talent and depth of our team. Forum_W is designed to attract, develop, retain, and advance the best and deepest talent the market has to offer. That sounds like something we can all unconditionally support.

Of course, if you have any questions or feedback, we want to hear from you. We are interested in frank dialogue and believe there are no dumb or politically incorrect questions. You can e-mail questions or feedback to forum_w@mossadams.com or reach out directly to any advisory board member.

FORUM_W CONTINUES TO MAKE A DIFFERENCE

by Chris Schmidt, President & COO

Since 2008, we have built considerable momentum on one of our most important priorities—our effort to attract, retain, develop, and advance women. Through Forum_W, we established a set of short-, mid-, and long-term goals. Our short-term goal of generating activity and meaningful dialogue regarding women’s careers and experience at Moss Adams was achieved in 2010. Over the past year, we have made significant progress toward our midterm goals (2011–2013) of making impactful contributions to our women, our profession, and the communities we serve in each of our office locations. Here is a recap of what we have accomplished.

2011 Forum_W Annual Report

The third Forum_W annual report articulates our ongoing commitment to our mission and priorities as well as our progress toward midterm goals. It also celebrates some of our women who lead by example through contributions to our profession and their communities. The firm’s most recent achievements, being named to *Working Mother* magazine’s 100 Best Companies of 2011 and being named one of the Best Accounting Firms for Women by the Accounting MOVE Project for the second year in a row, are highlighted in the report.

Forum_W and Mentoring

Mentoring has always been a key Forum_W priority. We continue to be inspired by the authentic connections our people make and the impact these can have on women’s careers. We recently put together a Forum_W video that tells two stories: Melissa Harman, a partner in our Los Angeles office, and Kristine Hoeflin, a manager from Everett, share how mentoring has made an invaluable impact on their experience at Moss Adams. Their inspirational stories exemplify how Forum_W can support women through mentoring. If Forum_W can help replicate their experience across the firm, we will have hundreds of stories just like theirs.

Ongoing Commitment from Our Partners

For the third year in a row, our women partners met to discuss how they can “pay it forward” to junior women in the firm. This year’s meeting included table discussions about how they can improve retention and advancement of women. Ideas included:

- Providing women with more effective long-term career coaching
- Encouraging influential women partners to be role models
- Providing training for women partners to be more effective mentors or sponsors across the firm

Forum_W was an important topic at the 2011 Partners’ Meeting as well. The presentation included the video mentioned above and a personal story from Seattle tax partner Mark Christopher. Mark inspired the group by sharing how a simple

challenge he faced—inspiring the women who work with him to embrace business development—led to the initiation of a women’s networking partnership with U.S. Bank.

Office Champion Meeting

Office champions, the firm’s Forum_W network leaders, recently gathered to learn new strategies and best practices. The meeting included three breakout sessions:

- Engaging Men in Gender Initiatives
- Maximizing the Impact of Networking and Mentoring
- Leading Forum_W—Strategies and Best Practices

Our office champions left this meeting with renewed energy and determination to meet Forum_W’s goals of realizing cultural change and an increased retention and advancement rate of women at the firm.

Enhancing the Moss Adams Brand

Forum_W has become a differentiator for Moss Adams. Candidates, competitors, and clients are taking note that we are a firm that’s dedicated to helping drive change and advance women in the accounting profession. Our steadfast commitment to this purpose, even in a tough economy, has set us apart from many organizations and is particularly notable for a firm our size. We have been recognized for the unique approach we have taken to engaging on an office-by-office level and for the extent to which we have partnered with community organizations that are focused on women. We continue to make a conscious effort to communicate about Forum_W during recruiting, networking, and community activities and ask that you do the same.

Firm Priority

Our long-term commitment to Forum_W remains strong and continues to be a top strategic priority for the firm. Take a look at *The Competitive Edge 2012* to see how we will build on Forum_W’s momentum and how you can take an active role in supporting and leading change.

Thank You

I would like to thank our Forum_W Advisory Board and office champions for their tireless dedication to Forum_W. I would also like to thank everyone who has participated, engaged, and communicated internally and externally regarding Forum_W. Their contributions have helped us accomplish more than we ever thought possible in three short years.

For more information about Forum_W, visit www.mossadams.com/forumforwomen.