

AIMM Diversity, Equity, And Inclusion (DEI)

Self-Assessment Tool





AIMM MISSION

To be a powerful force prioritizing diverse consumers and advancing inclusive and multicultural marketing to achieve business growth and equity for all.





AIMM PLEDGE

As ANA/AIMM members, we pledge to hold ourselves and the industry accountable for promises made to rid our industry of systemic racism and institutional bias.





AIMM DEI STATEMENT

At AIMM, we value the unique perspectives and experiences that every person brings to advance our mission of equality and justice across the marketing and advertising industry for business growth. We strive to be a compassionate, reflective, learning community, actively reaching out to bridge differences for equity through the transformation of ourselves, our organizations, and our industry.





INTRODUCTION: WHAT IS THE DEI ASSESSMENT PERFORMANCE TOOL?

PURPOSE

The AIMM DEI Self-Assessment tool was developed as a complimentary mechanism to the AIMM DEI Maturity Model that can be used to self-assess the organizations' current position across multiple dimensions of DEI and identify opportunities to further DEI focus (e.g., current DEI policies, procedures, initiatives, participants) and other interventions to maximize their impact internally and externally. This Self-Assessment tool consists of 50 thought-provoking questions accessible through an Excel sheet or Google Form. The AIMM DEI Self-Assessment tool was created by AIMM DEI Track Members.

APPLICATION

Organizations can conduct an internal self- assessment using the AIMM DEI Self-Assessment Tool via a Google Form or an Excel format. This tool can also be applicable for those who are just starting their DEI journey. AIMM encourages any organizational leader, DEI practitioners, marketers, agencies, and other stakeholders to use this tool to deepen their understanding about their current state of DEI and DEI maturity level and develop strategies to advance inclusion and a culture of belonging.



ASSESS

Take inventory of current DEI efforts to determine current maturity levels



BLIND SPOTS

Identify gaps and opportunities



DEI ROADMAP

Determine how far you want to go in the Maturity Model



TAKE ACTION

Develop a strategic action plan for DEI in your organization



EVALUATE

Use the DEI Scorecard to measure progress



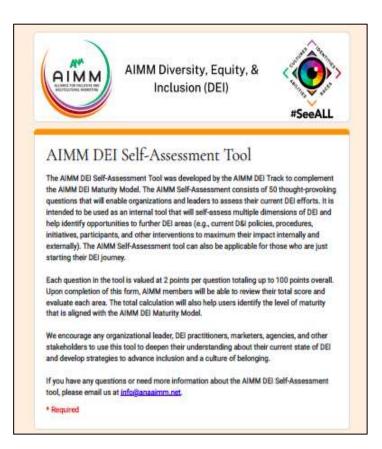


AIMM SELF-ASSESSMENT TOOL: INTRODUCTION

THE TOOL IS AVAILABLE VIA EXCEL, GOOGLE SHEET, AND GOOGLE FORM

	AIMM DEI Self-Assessment Tool		
Goal: For o	organizations to self-assess their current position across multiple dimensions of DEI. Ident	tify opportunities	to further DEI-
focus (e.g., current D&I policies, procedures, initiatives, participants, and other interventions to maximum their impact internally and			
externally	. Also, map responses back to DEI maturity model to develop an action plan or path for	vard.	
O	No. Secretarios I torre	Resp	
Questions	Key Organizational Areas	Yes	
Q.1-50	7 Key Areas	(2pts)	No (0 etc)
		(zpis)	(0 pts)
Key Area			
1	Business Integration		
1	Our DEI strategy is embedded into the enterprise business strategy and a consideration in all decisions we make.		
2	Our DEI leader reports directly to the CEO, People Officer or other C-Suite Level leader		
2	and has access to resources and budgets to activate against the strategy.		
	Senior leadership is actively and visibly demonstrating and communicating their		
3	commitment to DEI both internally and externally.		
4	DEI business and performance goals are aligned with executive/senior leadership compensation.		
5	Our DEI efforts are agile, proactive, innovative, and industry leading.		
	DEI efforts are measured, monitored, and reported internally and externally at the		
6	highest of levels.		
7	Our DEI efforts are recognized externally (awards, accolades, media coverage).		
	TOTAL BUSINESS INTEGRATION	0	0
Key Area 2	Talent Management		
8	Do you understand the current diversity demographics of your workforce and your team?		
9	Do you have a plan for hiring diverse talent across the various levels of roles within your organization?		
10	Does your talent management use representation demographics for recruitment planning, retention programs, bonuses/merits, and promotions?		
11	Do you have a plan in place to hold talent management and hiring managers accountable to meet representation indicators in recruiting and hiring?		
	Does your organization have formal or structured DEI development programs such as		
12	mentoring, rotation, leadership or educational/training for technical or non-technical		
12	development?		
13	Does your organization provide easy access to DEI development programs for employees?		
14	Does your organization have succession plans targeted to underrepresented groups?		
15	Does your organization have a dedicated resource to research and implement DEI initiatives?		
	TOTAL TALENT MANAGEMENT	0	0
	TOTAL TALLITT MANAGEMENT		

_			
Questions	Key Organizational Areas		ponse
Q,1-50	7 Key Areas	Yes (2pts)	No (0 pts
Key Area 1	Business Integration		
1	Our DEI strategy is embedded into the enterprise business strategy and a consideration in all decisions we make.		
2	Our DEI leader reports directly to the CEO, People Officer or other C-Suite Level leader and has access to resources and budgets to activate against the strategy.		
3	Senior leadership is actively and visibly demonstrating and communicating their commitment to DEI both internally and externally.		
4	DEI business and performance goals are aligned with executive/senior leadership compensation.		
5	Our DEI efforts are agile, proactive, innovative, and industry leading.		
6	DEI efforts are measured, monitored, and reported internally and externally at the highest of levels.		
7	Our DEI efforts are recognized externally (awards, accolades, media coverage).		
	TOTAL BUSINESS INTEGRATION	0	0
Key Area 2	Talent Management		
8	Do you understand the current diversity demographics of your workforce and your team?		
9	Do you have a plan for hiring diverse talent across the various levels of roles within your organization?		
10	Does your talent management use representation demographics for recruitment planning, retention programs, bonuses/merits, and promotions?		
11	Do you have a plan in place to hold talent management and hiring managers accountable to meet representation indicators in recruiting and hiring?		
12	Does your organization have formal or structured DEI development programs such as mentoring, rotation, leadership or educational/training for technical or non-technical development?		
13	Does your organization provide easy access to DEI development programs for employees?		



Excel Sheet

Google Sheet

Google Form





EXCEL SHEET AND GOOGLE SHEET

Instructions

The Excel Sheet and the Google Sheet are accessible and downloadable by All AIMM Members.

To access the Excel Sheet, open the file from <u>anaaimm.net</u> Click File and then Save As and save to desired location to begin.

To access the Google Sheet, click on the hyperlink from the <u>anaaimm.net</u>. Then click on File and Make a Copy of the self-assessment before beginning.

Each question in the tool has a value of 2 points, totaling up to 100 points. If your answer is "Yes" to any of the questions type in "2" in the yes column to the right of the question. If your answer is "No" proceed to the next statement.

Upon completion of this form, AIMM members will be able to review their total score and evaluate each area. There will be a quick data analysis that will include a few charts generated by responses.

focus (e.g.	organizations to self-assess their current position across multiple dimensions of DEI. Ident , current D&I policies, procedures, initiatives, participants, and other interventions to max Also, map responses back to DEI maturity model to develop an action plan or path forv	cimum their impa	
Questions	Key Organizational Areas	Resp	onse
Q,1-50	7 Key Areas	Yes (2pts)	No (0 pts)
Key Area	Business Integration		
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2	Our DEI leader reports directly to the CEO, People Officer or other C-Suite Level leader and has access to resources and budgets to activate against the strategy.		
3	Senior leadership is actively and visibly demonstrating and communicating their commitment to DEI both internally and externally.		
4	DEI business and performance goals are aligned with executive/senior leadership compensation.		
5	Our DEI efforts are agile, proactive, innovative, and industry leading.		
6	DEI efforts are measured, monitored, and reported internally and externally at the highest of levels.		
7	Our DEI efforts are recognized externally (awards, accolades, media coverage).		
	TOTAL BUSINESS INTEGRATION	0	0
Key Area 2	Talent Management		
8	Do you understand the current diversity demographics of your workforce and your team?		
9	Do you have a plan for hiring diverse talent across the various levels of roles within your organization?		
10	Does your talent management use representation demographics for recruitment planning, retention programs, bonuses/merits, and promotions?		
11	Do you have a plan in place to hold talent management and hiring managers accountable to meet representation indicators in recruiting and hiring?		
12	Does your organization have formal or structured DEI development programs such as mentoring, rotation, leadership or educational/training for technical or non-technical development?		
13	Does your organization provide easy access to DEI development programs for employees?		

Does your organization have succession plans targeted to underrepresented groups?





AIMM SELF-ASSESSMENT TOOL: BUSINESS INTEGRATION

EXCEL AND GOOGLE SHEET TEMPLATE

AIMM DEI Self-Assessment Tool

Goal: For organizations to self-assess their current position across multiple dimensions of DEI. Identify opportunities to further DEI-focus (e.g., current D&I policies, procedures, initiatives, participants, and other interventions to maximum their impact internally and externally). Also, map responses back to DEI maturity model to develop an action plan or path forward.

Questions	Key Organizational Areas	Resp	onse
Q.1-50	7 Key Areas	Yes (2pts)	No (0 pts)
ey Area	Business Integration		
1	Our DEI strategy is embedded into the enterprise business strategy and a consideration in all decisions we make.		
2	Our DEI leader reports directly to the CEO, People Officer or other C-Suite Level leader and has access to resources and budgets to activate against the strategy.		
3	Senior leadership is actively and visibly demonstrating and communicating their commitment to DEI both internally and externally.		
4	DEI business and performance goals are aligned with executive/senior leadership compensation.		
5	Our DEI efforts are agile, proactive, innovative, and industry leading.		
6	DEI efforts are measured, monitored, and reported internally and externally at the highest of levels.		
7	Our DEI efforts are recognized externally (awards, accolades, media coverage).		
	TOTAL BUSINESS INTEGRATION	0	0





AIMM SELF-ASSESSMENT TOOL: TALENT MANAGEMENT

Key Area 2	Talent Management		
8	Do you understand the current diversity demographics of your workforce and your team?		
9	Do you have a plan for hiring diverse talent across the various levels of roles within your organization?		
10	Does your talent management use representation demographics for recruitment planning, retention programs, bonuses/merits, and promotions?		
11	Do you have a plan in place to hold talent management and hiring managers accountable to meet representation indicators in recruiting and hiring?		
12	Does your organization have formal or structured DEI development programs such as mentoring, rotation, leadership or educational/training for technical or non-technical development?		
13	Does your organization provide easy access to DEI development programs for employees?		
14	Does your organization have succession plans targeted to underrepresented groups?		
15	Does your organization have a dedicated resource to research and implement DEI initiatives?		
	TOTAL TALENT MANAGEMENT	0	0





AIMM SELF-ASSESSMENT TOOL: EMPLOYEE ENGAGEMENT

Key Area 3	Employee Engagement		
16	DEI messaging is embedded into all internal communications, highlighted regularly and a robust employee engagement strategy is present.		
17	ERG/BRG/AG operate like a business, are aligned to the enterprise business strategy, are embedded into business processes, and pulled in by business leaders and report and measure all activity.		
18	The DEI learning/training strategy is robust, measured for efficacy and all employees actively participate and commit to taking actions.		
19	We measure inclusion via employee listening methods or platforms (annual engagement survey, pulse surveys, etc).		
20	Our organization has an inclusive and safe environment where employees feel valued and are free from harrassment/hostility.		
21	Are your formal or structured development methods showing a large impact of success for underrepresented groups?		
22	Is your mentoring and coaching accessible to all employees?		
23	Are your executives/sponsors engaged in development of underrepresented leaders?		
	TOTAL EMPLOYEE ENGAGEMENT	0	0





AIMM SELF-ASSESSMENT TOOL: BRAND RECOGNITION

Key Area 4	Brand Recognition	
24	Is diverse representation being considered and adopted during the development of ads, programming and marketing campaigns?	
25	Is content cultural relevancy of all segments being measured across brands and serve as a metric for media placement?	
26	Are cultural insights, nuances, and cues infused across marketing processes from the development of creative briefs and communications development process?	
27	Do you have a plan for responding to DEI related situations (e.g., media response to bad press)?	
28	Does your public relations respond to external DEI questions with collaboration and input from DEI, HR or ERG/BRG/AG?	
29	Do you include inclusion messages used across social and digital channels for talent recruiting and/or multicultural events?	
30	Are ads and marketing campaigns deployed with a DEI lens when testing?	
31	Does your organization use CIIM as the tool to conduct inclusivity testing?	
32	Our organization consistently showcases inclusion on all communications channels internal and external.	
	TOTAL BRAND RECOGNITION	





AIMM SELF-ASSESSMENT TOOL: DATA TRANSPARENCY

Key Area 5	Data Transparency	
33	Diversity metrics are looked at as best-in-class, known at all levels, shared internally and externally, and are used to drive continual change.	
34	Is organization securing data sources across consumer purchase behavior, targeting, audience, and results to provide marketing decision makers with the same breadth and level of visibility across all segments?	
35	Are data providers required to provide independent accuracy validations and comply with standards across all segments and report on progress?	
36	Metrics have been identified as KPIs for DEI initiatives and actions. We compare our DEI metrics with external diversity metrics.	
37	The data is reviewed at least on a quarterly basis.	
	TOTAL DATA TRANSPARENCY	





AIMM SELF-ASSESSMENT TOOL: SUPPLIER DIVERSITY

Key Area 6	Supplier Diversity	
38	Does your organization set goals and share them often to hire/use diverse suppliers for multicultural and inclusive projects regardless of segments?	
39	Does your organization work to expand the pipeline for greater diversity among investment advisors and vendors?	
40	Has your organization modified its supplier criteria to invest, and train its diverse suppliers to enable them to thrive?	
41	Our supplier diversity procurement spent is embedded across the business in multicultural and inclusive markets.	
42	Does your organization mandate supplier diversity engagement in your creative and production departments?	
43	We track diversity suppliers in the different areas of the creative and production process and measure them against supplier diversity performance KPIs.	
	TOTAL SUPPLIER DIVERSITY	





AIMM SELF-ASSESSMENT TOOL: SOCIAL IMPACT

Key Area 7	Social Impact	
44	Does your organization make charitable contributions, support social media messages, and/or build alliances with multicultural and inclusive communities?	
45	Does your organization actively lead and engage with external organizations to drive DEI in the community and the marketplace like AIMM, HRC, AdCouncil, ANA, etc.?	
46	Does your organization have a strategy and invest in the future workforce through education?	
47	Does your organization support and engage in any of the 17 Social Development Goals (SDGs) set by the United Nations?	
48	Does your organization sponsor special events or conferences supporting multicultural and inclusive communities such as professional conferences, marathons to help people with disabilities, cancer patients fundraisers, mental health awareness, etc.?	
49	Does your social responsibility strategy include funding/investments to communities of color?	
50	Do you collaborate with other businesses, peers, or industry partners to elevate and address important issues to advance DEI for greater social impacts?	
	TOTAL SOCIAL IMPACT	





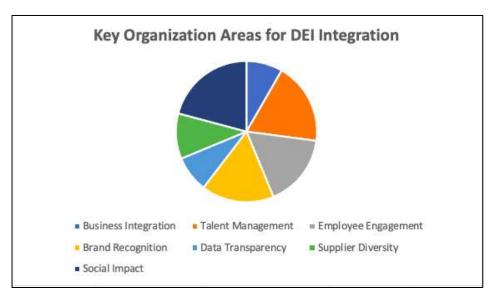
AIMM SELF-ASSESSMENT TOOL: SUMMARY POINT SCALE

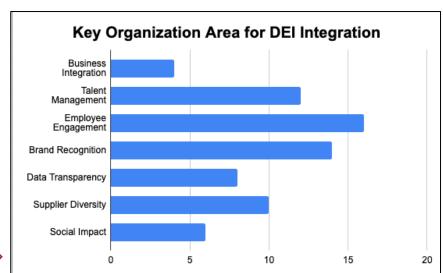
GRAND TOTAL	0	0
Point Scale	Rating	DEI Maturity Level
80-100	Excel	Leading
60-80	Above Average	Advanced
40-60	Average	Integrated
20-40	Satisfactory	Foundation
0-20	Unsatisfactory	Initial

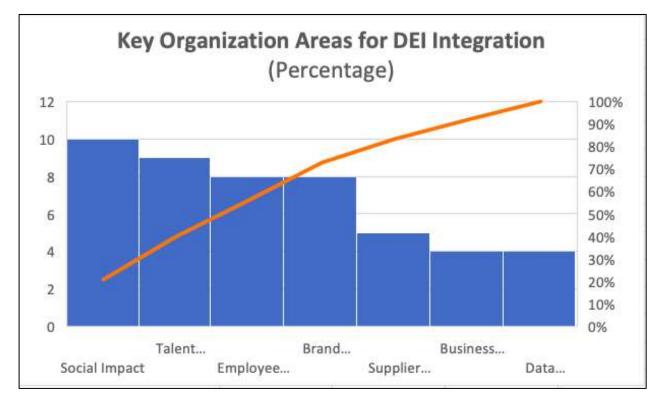




RESPONSE DATA REPORTS AVAILABLE VIA EXCEL AND GOOGLE SHEETS











GOOGLE FORM: INSTRUCTIONS

Form Request

AIMM members interested in the Google Form version of the AIMM DEI Self-Assessment Tool must submit a request via email to AIMM DEI Director Nancy Diaz at nancy@anaaimm.net with the subject line "AIMM DEI Self-Assessment Form Request."

Access will be granted in the order of the waitlist. Those on the waitlist will be notified when access is granted to fill out the form and review their results. Each user will have 48 hours to access the form before access is disabled.

During temporary access users will be designated "Collaborator" to the Google Form. Users will be able to complete the self-assessment and review scores according to the DEI Maturity Model Point Scale. Users are prohibited from sharing this link or make any changes to the form during the 48-hour access window.

If self-assessment is completed before the 48 hours or access is no longer needed, please email AIMM DEI Director Nancy Diaz at nancy@anaaimm.net with the subject line "AIMM DEI Self-Assessment Form-Completed."

All contact information, company, and scores are only accessible and viewable by the Collaborator. All information provided will be deleted/removed upon expiration of the 48 hours access window.



AIMM Diversity, Equity, & Inclusion (DEI)



AIMM DEI Self-Assessment Tool

The AIMM DEI Self-Assessment Tool was developed by the AIMM DEI Track to complement the AIMM DEI Maturity Model. The AIMM Self-Assessment consists of 50 thought-provoking questions that will enable organizations and leaders to assess their current DEI efforts. It is intended to be used as an internal tool that will self-assess multiple dimensions of DEI and help identify opportunities to further DEI areas (e.g., current D&I policies, procedures, initiatives, participants, and other interventions to maximum their impact internally and externally). The AIMM Self-Assessment tool can also be applicable for those who are just starting their DEI journey.

Each question in the tool is valued at 2 points per question totaling up to 100 points overall. Upon completion of this form, AIMM members will be able to review their total score and evaluate each area. The total calculation will also help users identify the level of maturity that is aligned with the AIMM DEI Maturity Model.

We encourage any organizational leader, DEI practitioners, marketers, agencies, and other stakeholders to use this tool to deepen their understanding about their current state of DEI and develop strategies to advance inclusion and a culture of belonging.

If you have any questions or need more information about the AIMM DEI Self-Assessment tool, please email us at info@anaaimm.net.

* Required



DIGITAL ALTERNATIVE VIA GOOGLE FORM

An automated form that collects responses and calculates scores upon completion.



AIMM Diversity, Equity, & Inclusion (DEI)



AIMM DEI Self-Assessment Tool

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* Required







DIGITAL ALTERNATIVE VIA GOOGLE FORM: BUSINESS INTEGRATION

Business Integration *		14 point
	Yes	No
Our DEI strategy is embedded into the enterprise business strategy and a consideration in all decisions we make.	0	0
Our DEI leader reports directly to the CEO, People Officer or other C-Suite Level leader and has access to resources and budgets to activate against the strategy.	0	0
Senior leadership is actively and visibly demonstrating and communicating their commitment to DEI both internally and externally.	0	0
DEI business and performance goals are aligned with executive/senior leadership compensation.	0	0
Our DEI efforts are agile, proactive, innovative, and industry leading.	0	0
DEI efforts are measured, monitored, and reported internally and externally at the highest of levels.	0	0
Our DEI efforts are recognized externally (awards, accolades, media coverage).	0	0





DIGITAL ALTERNATIVE VIA GOOGLE FORM: TALENT MANAGEMENT

Talent Management *		16 point
	Yes	No
Do you understand the current diversity demographics of your workforce and your team?	0	0
Do you have a plan for hiring diverse talent across the various levels of roles within your organization?	0	0
Does your talent management use representation demographics for recruitment planning, retention programs, bonuses/merits, and promotions?	0	0
Do you have a plan in place to hold talent management and hiring managers accountable to meet representation indicators in recruiting and hiring?	0	0
Does your organization have formal or structured DEI development programs such as mentoring, rotation, leadership or educational/training for technical or non-technical development?	0	0
Does your organization provide easy access to DEI development programs for employees?	0	0
Does your organization have succession plans targeted to underrepresented groups?	0	0
Does your organization have a dedicated resource to research and implement DEI initiatives?	0	0





DIGITAL ALTERNATIVE VIA GOOGLE FORM: EMPLOYEE ENGAGEMENT

Employee Engagement *		16 points
	Yes	No
DEI messaging is embedded into all internal communications, highlighted regularly and a robust employee engagement strategy is present.	0	0
ERG/BRG/AG operate like a business, are aligned to the enterprise business strategy, are embedded into business processes, and pulled in by business leaders and report and measure all activity.	0	0
The DEI learning/training strategy is robust, measured for efficacy and all employees actively participate and commit to taking actions.	0	0
We measure inclusion via employee listening methods or platforms (annual engagement survey, pulse surveys, etc).	0	0
Our organization has an inclusive and safe environment where employees feel valued and are free from harrassment/hostility.	0	0
Are your formal or structured development methods showing a large impact of success for underrepresented groups?	0	0
Is your mentoring and coaching accessible to all employees?	0	0
Are your executives/sponsors engaged in development of underrepresented leaders?	0	0





DIGITAL ALTERNATIVE VIA GOOGLE FORM: BRAND RECOGNITION







DIGITAL ALTERNATIVE VIA GOOGLE FORM: DATA TRANSPARENCY

Data Transparency *		10 points
	Yes	No
Diversity metrics are looked at as best-in-class, known at all levels, shared internally and externally, and are used to drive continual change.	0	0
Is organization securing data sources across consumer purchase behavior, targeting, audience, and results to provide marketing decision makers with the same breadth and level of visibility across all segments?		0
Are data providers required to provide independent accuracy validations and comply with standards across all segments and report on progress?	0	0
Metrics have been identified as KPIs for DEI initiatives and actions. We compare our DEI metrics with external diversity metrics.	0	0
The data is reviewed at least on a quarterly basis.	0	0





DIGITAL ALTERNATIVE VIA GOOGLE FORM: SUPPLIER DIVERSITY

Supplier Diversity *		12 point
	Yes	No
Does your organization set goals and share them often to hire/use diverse suppliers for multicultural and inclusive projects regardless of segments?	0	0
Does your organization work to expand the pipeline for greater diversity among investment advisors and vendors?	0	0
Has your organization modified its supplier criteria to invest, and train its diverse suppliers to enable them to thrive?	0	0
Our supplier diversity procurement spent is embedded across the business in multicultural and inclusive markets.	0	0
Does your organization mandate supplier diversity engagement in your creative and production departments?	0	0
We track diversity suppliers in the different areas of the creative and production process and measure them against supplier diversity performance KPIs.	0	0





DIGITAL ALTERNATIVE VIA GOOGLE FORM: SOCIAL IMPACT

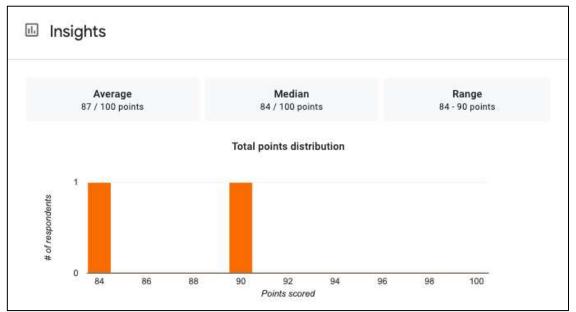
Social Impact *		14 poin
	Yes	No
Does your organization make charitable contributions, support social media messages, and/or build alliances with multicultural and inclusive communities?	0	0
Does your organization actively lead and engage with external organizations to drive DEI in the community and the marketplace like AIMM, HRC, AdCouncil, ANA, etc.?	0	0
Does your organization actively lead and engage with external organizations to drive DEI in the community and the marketplace like AIMM, HRC, AdCouncil, ANA, etc?	0	0
Does your organization have a strategy and invest in the future workforce through education?	0	0
Does your organization support and engage in any of the 17 Social Development Goals (SDGs) set by the United Nations?	0	0
Does your organization sponsor special events or conferences supporting multicultural and inclusive communities such as professional conferences, marathons to help people with disabilities, cancer patients fundraisers, mental health awareness, etc?	0	0
Do you collaborate with other businesses, peers, or industry partners to elevate and address important issues to advance DEI for greater social impacts?	0	0

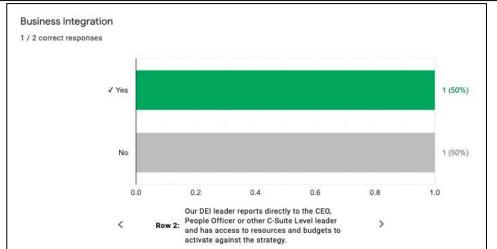


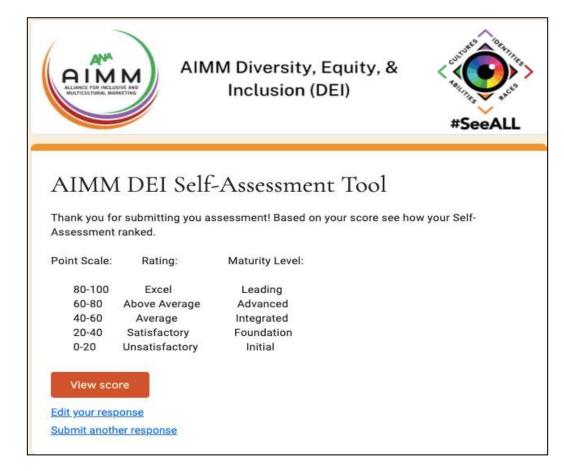


DATA COLLECTION AND REPORTS VIA GOOGLE FORM

Using the self-assessment Google Form limits to bar chart data insights per category.











AIMM DEI TRACK

AIMM brings together industry leaders to collaborate for the advancement of equity and social justice. The DEI Track was established in the fall of 2020 with a mission to "Elevate DEI as a main business driver to achieve growth and create impact in the marketing and advertising industry." The team is represented by leaders from the DEI community, media, advertisers, research agencies, and various brands.





CONTRIBUTORS

AIMM DEI Track Chairs:

Gilda Zevallos, Integrator: Producer/Creative/Production Supply Chain Lead, Nestlé Renetta McCann, Chief Inclusion Experience Officer, Publicis Groupe

<u>AIMM DEI Self-Assessment Tool Development Team:</u>

Michael Spinella, VP, Partner Experience, Petco Jessica Ozrek, CEO/Client Partnerships, Elysians Staffing Gilda Zevallos, Integrator: Producer/Creative/Production Supply Chain Lead, Nestlé

AIMM Leadership Team:

Gilbert Dávila, Co-Founder Lisette Arsuaga, Co-Founder Carlos Santiago, Co-Founder Karla Lucia, Executive Director Nancy Diaz, Director of Diversity, Equity, and Inclusion





CONTRIBUTORS

AIMM DEI Track Team Members:

Michael Johnson, Divisional VP of Diversity and Inclusion, Abbott April Kates-Ellison, VP Membership, ADA Brigida Muñoz, VP, Product, and Marketing, American Express Jillian Gibbs, Founder and Global CEO, APR Sue de Lopez, Managing Director, Global Business Development & Marketing, APR Elliot Lum, EVP, AEF, ANA Meg Wubbenhorst, VP/Program Lead, CMO Practice, ANA Melissa Healy, SVP, Group Creative Director, Employee Belonging and Participation Lead, ARCWW/Leo Burnett Jackie Hunter, Senior Director, Diversity/Inclusion and Talent Pipeline, Banner Health Jeff Jarrett, NA, CMO, Bayer Consumer Health Luke Whitehead, Manager, Diversity & Inclusion, Brown-Forman Nikki Darden, Head of Global Marketing Integration, Citi Jazmyn Williams, Manager, Multicultural Marketing, Coca-Cola José E. Velez-Silva, VP Multicultural IMC Brand, Comcast Ariana Solis Gómez VP, Group Account Director, Culture One World Terrance Irizarry, Chief Inclusive Diversity Officer, Danone Jessica Ozrek, CEO/Client Partnerships, Elysians Staffing Owen Lewis, Marketing Manager, Elysians Staffing Jason Rosario, Chief Diversity, Equity, and Inclusion Officer, Energy BBDO Katherine Shappley, VP, Global Business Group Scaled, North America, Facebook Lena Lewis, Senior Director, Consumer Engagement, Ferrara USA Natasha Archibald, Manager Trade Marketing, Garden of Life Tracy Bjelland, Marketing Manager, General Mills





CONTRIBUTORS

AIMM DEI Track Team Members continued:

Bryony Bouyer, SVP of Diversity and Inclusion and Multicultural Strategy, Hasbro Amy L. Spears, VP, Creative & Brand Design, Highmark Health Kristen Wells, Director of Diversity and Inclusion, Hilton Charlene Zappa, Officer, SVP Growth & Consumer Engagement, J.M. Smucker Tiana Conley, VP of Global Cereal, Kellogg Reginaldo (Reggie) Reyes, VP of Brand Experience, Knock Inc Angela Guy, Chief Diversity & Inclusion Officer, L'Oréal NA Corey Smith, Head of Diversity & Inclusion, North America, LVMH Mike Reid, VP, Multicultural, Pandora Nidia Serrano, Director, Audience Marketing, Pandora Michael Spinella, VP, Partner Experience, Petco Devin O'Loughlin, Global Chief Diversity, Equity, & Inclusion and Communications Officer, RAPP Jorge A. Plasencia, Co-Founder, Chairman, and CEO, Republica Havas Cat Kennedy, Global Head of Talent & Organizational Development, Sabra Jennifer Payne, Diversity, Equity & Inclusion Lead, TBWA/Chiat/Day Alice Rivera, Managing Partner and VP of Client Services & Operations, The 360 Agency Cristina Rivard, Senior Director, HRBP, True Car JP Rodriguez, Head of Account Management, United Collective/Gallegos United Gregory Edwards, EVP/COO, Uniworld Group, Inc.





RESOURCES AND LINKS

For information on AIMM, please contact: info@anaaimm.net

For questions about AIMM DEI, please contact: Nancy Diaz AIMM Director of DEI nancy@anaaimm.net







