

# Global Diversity and Inclusion Benchmarks

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# INTRODUCTION

*Global Diversity and Inclusion Benchmarks* is a tool for helping organizations assess and measure their progress in valuing and managing diversity and fostering inclusion. Although conditions and attitudes vary greatly worldwide, we have identified these benchmarks as global because they can be used anywhere in the world. And while making them global has certainly been a challenge, we believe these benchmarks are important because the need for diversity management and inclusion has become increasingly critical.

**Who can use this tool?** We have written *Global Diversity and Inclusion Benchmarks* to apply to all types of organizations in all sectors. The benchmarks will be most relevant to large and medium-sized organizations; however, we believe small organizations will also benefit from working with the benchmarks.

**About the categories.** We have researched and compiled 14 categories that make up the benchmarks, and that are derived from expert input worldwide. The 14 categories cover a wide range of topics. In using the benchmarks, one can select from the 14 categories offered – **not all need apply, nor are they to be weighted equally.** Different organizations will choose different categories and weightings for those categories. This recognizes and respects the diversity of interests and approaches globally.

**Using the benchmarks.** Benchmarks usually incorporate best practices (or those perceived to be best practices at the time, though these can change). Organizations that do benchmarking may look upon these benchmarks as prescriptive for success or simply as descriptive of current best practices. We believe the descriptive approach is safest, as the context is usually critical in assessing importance and relevance of the benchmarks. In one context one might ignore a best practice, while in another context it may be a critically sought factor. From a global perspective, therefore, it is imperative not to blindly follow these benchmarks, but to first evaluate the relevance and importance of them to your organization.

The best practices in each category are shown as 100%. For each category, the benchmarks are divided into five levels that indicate progress toward the best practices in that category – from 0% (where no work has begun) to 25% to 50% to 75% and then on to the best practices at 100%. For example, if your organization’s practices generally match the 50% level in a category, you can consider your organization to be at the 50% level of the best practice in that category.

**Defining terms.** We define “diversity” and “inclusion” broadly. “Diversity” refers to the variety of differences and similarities among people, such as gender, race/ethnicity/tribe, age, religion, language, nationality, disability, sexual orientation, work style, work experience, job role and function, thinking style, personality type, socio-economic status, and so forth.



“Inclusion” refers to how these differences and similarities are respected and create an equitable, healthy, and high-performing organization or community in which all individuals and their contributions are valued. By “global,” we simply mean that these benchmarks are universally applicable, not specific to a country or culture. However, cultural and country differences will greatly impact which categories you select and prioritize.

**Conceptual frameworks.** There are competing conceptual frameworks for understanding and categorizing global diversity work. Some of the prominent conceptual frameworks around diversity and inclusion include: 1) legal and compliance, 2) social justice, 3) cultural competence, 4) strategic diversity management, and 5) overcoming oppression. Our benchmarks include aspects of all of these sometimes competing frameworks. However, it should be acknowledged that the United States has had a head start in diversity work. Therefore, many of the diversity best practices described in the benchmarks were developed in the U.S., implicitly bringing with them underlying values of egalitarianism, fairness, individualism, individual control, and responsibility, etc. That said, some of these values are in part the basis of and expressed in the United Nations’ Universal Declaration of Human Rights, a worldwide platform for diversity and inclusion.

**Background on the source and development.** *Bench Marks for Diversity* was first published by the Tennessee Valley Authority (TVA) in the early 1990s based on groundbreaking research. We revised and reformatted the benchmarks to apply to today’s world and the practice of diversity around the world. The original researchers were Kate Atchley, JoAnne Howell, Gerald Landon, Vergil Metts, and Hector Qirko. Because *Bench Marks for Diversity* was developed with federal U.S. funds, it is not copyrighted. It was revised a few times but had not been updated since the mid-1990s. However, we believe *Bench Marks for Diversity* has great merit and usefulness in providing a baseline for organizational development in the diversity arena, and for learning about best practices.

Essentially, we set out to:

- 1) update the *Bench Marks for Diversity* with current best practices from around the world, and
- 2) make this a global tool, usable anywhere in the world.

We have modified the original format, with descriptors now at 0%, 25%, 50%, 75%, and 100% (The original benchmark had descriptors in six steps/levels: 0%, 20%, 40%, 60%, 80%, and 100%). We thank the TVA for permission to use the original.

**Permission to use.** While not legally required, permission was granted to us to use the U.S.-based TVA work to create an updated and globalized benchmarks. The resulting *Global Diversity and Inclusion Benchmarks* tool is provided free of charge with the provision that the new copyright is always respected and acknowledged.

**The authors.** Both of us reside in the United States and are aware of the cultural consequences of our location and background in compiling these global benchmarks. Alan grew up in South Africa, lived in the U.K., and does diversity work around the world. Julie grew up in the Midwest of the United States, has lived in several U.S. cities, has traveled and consulted in several countries, and is writing a book to be published by Pfeiffer/John Wiley in 2007 on diversity best practices around the world.

**The panel of experts.** To augment and validate our global view, we have called on a panel of experts who reside and/or work globally. They are listed and acknowledged for their invaluable contributions on page 15.

We hope that this *Global Diversity and Inclusion Benchmarks* tool will be a useful one in helping organizations worldwide assess themselves objectively. We encourage organizations to aspire to be the best place to work from a diversity and inclusion perspective. Leveraging diversity and making an organization more inclusive is key to making this a better world to live and work in, one organization at a time.

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**October 2006**

## HOW TO USE THIS GLOBAL DIVERSITY AND INCLUSION BENCHMARK TOOL

Not all 14 categories of benchmarks need be used. While we have ordered the categories so that some are listed near others, please do not let the order of appearance infer any importance to your organization. It is recommended to read all 14 categories before deciding on how to use the benchmarks. Organizations should focus on the categories most important to them, based on relevance, diversity context, geographic, cultural, and other considerations. Here are some ways to use these benchmarks:

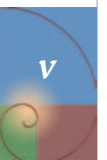
- **To set and stretch your standards.** Standards are helpful for employees and managers because they help define excellent practice. Use the benchmarks to set standards for achievement for diversity work in your organization as part of a strategy and planning process. Likewise, use them to help stretch your existing standards as you continue striving toward excellence.
- **To engage employees and promote accountability for progress.** Have groups discuss selected categories and try to reach consensus on the level at which their departments or organizations currently rate, and if no consensus can be reached, then discover what is the narrowest agreed-upon range. Doing this repeatedly with different teams in the organization provides some objective measure for the organization, and tracked over time, it can show the progress of the organization in the chosen areas.
- **To determine short-term and long-term diversity and inclusion goals.** Use your organization's benchmark scores to determine which of the categories are most important or strategic to focus on, and then set goals for achieving some of the benchmarks and work toward increasing the percentage/score.
- **To develop or align your competency model and organizational capabilities to maximize diversity.** Use these benchmarks as the basis for determining what capabilities and/or competencies are needed to reach the desired standards in each level or to assure that existing organizational capabilities and knowledge, skills, and abilities meet these benchmark standards.

### How NOT to Use These Benchmarks

These benchmarks have been created based on our experiences and the experiences of the expert panel. While we are confident that the benchmarks represent realistic practices, they are not based on a systematic empirical study. Therefore, please use these benchmarks as guidelines only. Do not use them to make compensation decisions or to judge the effectiveness of individuals. We are not legally responsible for any misuse of these benchmarks. If you have questions about the use of this tool, please do not hesitate to contact us.

# CATEGORY DESCRIPTIONS

1. **Vision, Goals, and Policies.** Covers the organization's overall concept of and approach to diversity, including its formal articulation of the value of diversity, the requirements of managing diversity, and how diversity is embedded in the fabric of the organization.
2. **Leadership and Accountability.** Covers the responsibilities of the organization's leadership in shaping, guiding, and supporting the organization's diversity initiatives. It also covers the accountability methods for leadership and for the organization as a whole.
3. **Infrastructure and Implementation.** Explores the way the organization structures or organizes its diversity function so that it can carry out its diversity goals effectively. This covers diversity staffing, diversity councils, and diversity networks.
4. **Work Schedules and Rules/Flexibility.** Describes the way work is organized and the extent to which there are flexible work arrangements for employees, including rules about taking leave.
5. **Job Design, Classification, and Compensation.** Explores the way jobs are designed, classified, compensated, and assigned. It includes assessment of reward and recognition systems and the degree to which an organization is healthy and equitable.
6. **Employee Benefits and Services.** Gauges the benefits and services provided to employees to meet their specific needs and concerns.
7. **Measurement, Research, and Assessment.** Evaluates the way diversity and inclusion are measured; whether the organization does the research to support diversity strategies; and the organization's assessment processes around diversity, inclusion, and organizational culture.



8. **Recruitment, Staffing, and Advancement.** Describes how the organization ensures diversity and inclusion in the hiring and selection process, and whether it creates an inclusive culture that enhances professional excellence and supports a healthy rate of retention.
9. **Diversity Training and Education.** Explores diversity and inclusion awareness, skill-building training and education, and the integration of such training in the overall training and development of all employees.
10. **Diversity Communications.** Describes how diversity is articulated and promoted, both internally and externally.
11. **Performance Improvement, Training, and Career Development.** Explores the extent to which performance improvement, training, and career development are equitably provided to enable all employees to succeed in their careers.
12. **Community and Government Relations.** Covers the organization's efforts to establish links with and invest in the communities with which it interacts. This category also covers government relations and social responsibility.
13. **Products, Services, and Supplier Relations.** Gauges the organization's recognition of the diversity of its customer base and its effectiveness in designing and delivering appropriate products and services to current and future customers. This includes the processes of selecting, contracting, and interacting with the organization's suppliers and vendors.
14. **Marketing and Customer Service.** Surveys the organization's recognition of the diversity of its customer base and its sensitivity to the nuances of language, symbols, and images used in its marketing strategy, thereby attracting and satisfying its prospective and current customers.



# GUIDELINES FOR READING

Each category follows the same format. Each level is described as 0%, 25%, 50%, 75%, or 100%. The 100% level indicates best practices for each diversity category as perceived by the authors and in concurrence with the panel of experts. Going beyond the 100% would make your organization a pioneer and probably a model for the next update.

The 0% level typically identifies an organization that has not yet begun to focus on that specific diversity area. The 25% through 100% levels then progressively show where an organization might be situated as it improves in that category, finally reaching the 100%, or best-practice, level. **The 100% level only describes current best practices as of October 2006.**

The descriptors combine both processes and outcomes; however, the outcomes become more numerous and important the higher the level descriptor. **The positive outcomes are to be read cumulatively**, so that 100% descriptions incorporate the **positive** outcomes of 25%, 50% and 75%. For example, if at 25% or 50% the descriptor says “some managers,” assuming this is a positive outcome, then at 75% and 100% one can assume that “some managers” become “most (if not all) managers.” The cumulative effect is strongest in the 75% to 100% gap, and less so in the 50% to 75% range or below that.

## Terminology

To clarify definitions and avoid repeating lengthy terminology, please note the following:

- We refer simply to “diversity,” which in many places is shorthand for “global diversity and inclusion.”
- We use the term “diversity networks,” which includes employee networks, resource groups, affinity groups, worker councils, etc.
- We refer to equal opportunity (in lower case) to avoid country-specific legislation or compliance requirements.
- We use “protected groups or protected classes” to mean those groups that have been historically underrepresented in the organization or customer base or who have been oppressed or ignored in society, whether or not legislation exists to protect these groups.

- We use “senior diversity professional” to designate the person heading the diversity initiatives or the chief diversity officer in an organization. This person has expertise in diversity but may or may not be a full-time diversity professional. We want to distinguish the top executive or manager of the entire organization from the highest-ranking person in the organization with specific responsibility for diversity. While we believe that the top executive should also have diversity responsibility, we also believe that it is important to have a senior person in the organization with specific knowledge of diversity.
- We do not use “talent management” as a category, as it straddles the “Recruitment, Staffing, and Advancement” and “Performance Improvement, Training, and Career Development” categories.
- We use the phrase “preferences and traditions” to indicate thinking or practices that are sometimes confused with requirements that are founded in proven results. An example of a preference or tradition is that an organization almost always hires employees with degrees from certain schools or universities, even though other schools offer comparable degrees.
- We use the term “leaders” to describe everyone in the organization who has responsibility for showing leadership to accomplish the organization’s diversity vision and goals. In some cases these leaders will be senior managers, and in other cases, “leaders” will include all managers and supervisors and/or individual contributors.
- “Representation” and “achieving a balanced workforce” refers to an area of emphasis in diversity work where the goal is to assure that people are hired based on their qualifications, thereby making the various organizational levels, departments, functions, etc., equitable regarding the various diversity dimensions and/or making those dimensions mirror the labor market or customer base.
- We use the term “intercultural,” rather than “cross-cultural” or “multicultural” to refer to cultures around the world. There is no universally agreed-upon distinction between diversity and intercultural work, although “intercultural” sometimes refers only to country or regional cultures rather than a broader definition of culture. For example, in the disabilities community, various disabilities are sometimes considered cultures – such as a deaf culture or a blind culture.



# Category 1: VISION, GOALS, AND POLICIES

100%

- Most employees behave in a way that shows their commitment to achieving the vision for diversity.
- The links between organizational culture, achievement of goals, and diversity are clearly recognized.
- All business units and locations implement diversity plans according to their needs and priorities.
- Over 90% of a diverse sampling of employees rate the workplace as inclusive, fair, open, and flexible.
- All stakeholders support diversity, which is seen as one of the organization's core values and a key strategy for the organization's success.
- Diversity has become part of the fabric of the organization. It is not seen as an isolated program, but rather as a key to success.
- The organization is frequently benchmarked for diversity.

- The spirit, as well as the requirement to comply with equity, harassment prevention, and related diversity policies is fully supported.
- Managers can articulate the diversity vision, the relationship between diversity and business performance, and the organization's short- and long-term, measurable diversity goals.
- Business units, locations, and market areas have a business case and annual goals based on their specific diversity-related needs and issues.
- Individuals have standards of performance and/or diversity behaviors against which their work is measured.

75%

- Diversity is seen as a requirement for organizational performance.
- Diversity encompasses a variety of personal and work differences, which are seen as potential barriers that, if not properly managed, can interfere with organizational performance.
- A diversity business case emphasizing organizational performance, creativity, and success exists.
- A general diversity policy has been issued and communicated to all employees.
- Annual diversity goals are in development.

0%

- There is no explicit diversity vision, goals, policies, statement, or program(s).

- "Diversity" is narrowly defined, referring primarily to gender (usually women) and/or racial or ethnic groups. The focus is primarily on numbers of people represented at various organizational levels.

25%

- An equal opportunity statement or related legal policy exists.
- If legally required, equal opportunity, compliance, access, and other diversity-related issues are addressed.
- There is reference to diversity in the organization's values statement, but little is done to embed it in the organization.

50%

## Category 2: LEADERSHIP AND ACCOUNTABILITY

100%

- Management pay, bonuses, and promotions are tied to a variety of diversity indicators. Leaders are accountable for a balanced workforce, performance, and providing tools and resources.
- Managing diversity is considered an essential leadership competency.
- Senior managers are seen as change agents and role models. They routinely discuss the importance of diversity as a core organizational issue and strategy, and they provide consistent, visible leadership.
- Leaders and board members publicly support diversity-related initiatives, even if they are perceived to be controversial.
- Leaders and board members understand that the work of diversity is systemic and designed to change the organization's culture. They see themselves as owners, not just sponsors, of the organization's diversity work.

0%

- There is little or no leadership, involvement, or accountability regarding diversity.
- Leaders strive to treat everyone the same and express that no diversity issues exist.

25%

- The organization views diversity as a staff function.
- Managers and supervisors accept some responsibility for diversity, especially as it relates to equal opportunity.
- Leaders require scripts to discuss diversity.
- Reactive measures are taken to deal with difficult diversity situations.

75%

- Many managers, supervisors, and employees are involved in diversity issues and there are rewards and recognition given to diversity champions or advocates.
- Leaders support employee involvement in diversity networks.
- Leaders often make internal and external scripted and extemporaneous speeches or statements relating to diversity to a variety of groups.
- The board of directors is diverse, engaged in diversity issues, and holds the leadership team accountable for achieving the diversity vision.
- Most managers receive some coaching in diversity and provide coaching to others.
- Diversity is automatically incorporated into talent management processes.

- Managers and supervisors view managing diversity as one of their responsibilities. Some employees and managers take individual responsibility for diversity.
- Some leaders in the organization are active in diversity initiatives.
- Senior management willingly makes speeches and public statements, but these are usually limited to diversity-specific functions and groups.
- Senior management actively sponsors diversity networks.
- Leaders understand that diversity is about treating people fairly rather than the same (equally) and strive to accommodate differences.

50%

# Category 3: INFRASTRUCTURE AND IMPLEMENTATION

100%

- The senior diversity professional is a member of the senior management team and serves as its diversity coach.
- Employee teams or change agents exist throughout the organization to advise diversity change efforts.
- If the organization has diversity councils/committees, they work collaboratively with diversity professionals and the senior management team.
- The organization lives its diversity values as it supports the raising of issues and concerns, and encourages ideas from all employees.

- A senior manager leads the diversity function, supported by a knowledgeable staff of diversity professionals, adequate for the size and goals of the organization.
- Diversity networks have access to the organization's senior managers and decision-makers.
- Diversity councils/committees in departments, divisions, etc., exist and are in alignment with the organization-wide council/committee.
- Diversity professionals are viewed as change agents and, as such, collaborate with other organizational functions to meet the diversity vision.
- The diversity function has adequate resources and a structure designed to assure full implementation of strategy and plans.

75%

0%

- There is no organizational infrastructure for diversity.
- No one in the organization has formal responsibility for diversity issues.

- There is a senior-level manager and supporting diversity staff with responsibility for diversity.
- Diversity networks for previously excluded groups exist.
- An organization-wide diversity council/committee is given visible support by leaders, represents internal stakeholders, and has some influence on diversity efforts.
- An adequate budget has been allocated to cover implementation.

25%

- Diversity functions are performed as an additional, secondary duty of equal opportunity or human resources staff.
- A diversity team may exist, but it has no real power or influence in the organization.

50%

# Category 4: WORK SCHEDULES AND RULES/FLEXIBILITY

(Note: This category will be impacted by the various legal requirements in different countries.)

100%

- The organization readily adapts work schedules to employee needs and desires.
- Leaders role model work-life balance.
- Part-time, flexible work arrangements, and/or mobile working options are available for all appropriate positions. Their use, which managers do not only tolerate but encourage, does not negatively impact career development or progress.
- The organization accepts diversity in language, dress, physical expression, non-traditional schedules and leave as fully legitimate.
- Paid leave beyond what is legally required is provided when family or significant others' needs make it necessary.
- Attempts are made to accommodate religious practices and to schedule around religious holidays, even if they are not the holidays of the majority.
- Work-at-home and part-time arrangements are allowed for selected positions. Some job-sharing and part-time work may be permitted.
- The culture is somewhat accepting of those who work flexible schedules.
- Teleconference times are rotated to accommodate time zones.

75%

0%

- Little or no schedule flexibility or work leave is provided.
- Work schedules and rules covering physical space and dress are defined based on management's preferences and traditions of "normal" and "appropriate."

- Some work-schedule flexibility exists where appropriate. Schedules are open to occasional change based on employee needs and desires.
- Paid leave is provided for preventive health care, civic responsibilities, bereavement, etc. Additional unpaid parental leave is allowed. Unpaid leave may be allowed in emergencies.
- Work-at-home and part-time arrangements are occasionally allowed, particularly when required by illness or disability.
- Language needs and physical access are accommodated when market forces are compelling.
- Flexibility in dress and personal expression is allowed for employees who have little customer contact.

25%

- Legal requirements are met.
- Work schedules are determined by management and are generally inflexible and compliance-driven. If accommodations are made, they are usually inconsistently applied and perceived as favoritism.
- Paid leave is provided for illness and vacations.
- There is some flexibility in allowing employees to personalize their workspaces and their dress.

50%



# Category 5: JOB DESIGN, CLASSIFICATION, AND COMPENSATION

100%

- The organization has internally and externally equitable compensation and classification practices that emphasize development as well as both team and individual performance.
- The compensation policy is based on the philosophy of equal pay for work of equal value.
- Reward and compensation systems have been designed specifically to reduce bias in retention and development of high-performing talent.
- For corporations, stock options and profit sharing are offered equitably throughout the organization.

- Classification and compensation systems have been modified to address hidden biases and assumptions, and to ensure equity.
- For many employees, classification and compensation are based on both individual and team performance.
- Job requirements are clear and not confused by non-performance factors such as style or appearance preferences or traditions.
- If appropriate to the organization, international experience and functional rotation is built into development, especially among leaders.

75%

0%

- The organization lacks systematic methods for classifying jobs or determining employee compensation.
- Some jobs are thought to be more appropriate for certain groups, such as women or younger workers.

- Jobs are designed to accommodate individual as well as organizational needs.
- The organization has systematically reviewed its job classifications and compensation for obvious forms of bias and adverse impact.
- Some analysis and design of jobs have resulted in accommodation for some groups, such as younger workers, parents of young children, people with elder-care responsibilities, people with disabilities, or semi-retired persons.
- Classification/grading and compensation/remuneration systems are widely communicated to and understood by employees.

50%

25%

- Some written procedures exist for classifying jobs and determining compensation; market analysis and supervisors' discretion are the major determinants.
- There is an attempt to ensure that equal pay for equal work is the norm.

# Category 6: EMPLOYEE BENEFITS AND SERVICES

(Note: This category will be impacted by the various legal requirements in different countries.)

100%

- A full range of flexible benefits and services are provided based on employee needs, wants, and the organization's financial ability to provide them.
- A broad, inclusive definition of "family" is accepted, and significant others and same-sex partners are included in organizational events.
- Education and counseling are available to cover a wide variety of individual and family concerns.
- Based on research and assessment, benefits and services are adapted to changing conditions and are responsive to employee cultures and circumstances.
- Health and fitness benefits include education, clinics, fitness centers, and preventive care.
- Family-friendly services include subsidized child-care (on-site or outsourced), breastfeeding rooms, family rooms, emergency child-care, etc.
- There is some expansion of the term "family" to include employees' parents, domestic partner/civil relationships, and adult dependents.
- An employee assistance program that provides access to counselors and health-care professionals exists.
- Benefits and services are packaged and communicated in culturally sensitive ways taking cultural taboos and mind-sets into consideration.
- The organization does testing and analysis to ensure that all cultural groups understand benefits and services offered. If needed, the organization works to increase participation rates or to change benefits.

75%

0%

- Only legally required employee benefits and services are provided.

- The organization recognizes that employee needs outside of work impact the organization.
- Some flexible benefits and services exist and are monitored for fairness and suitability to changing conditions.
- Employees have input as to which benefit plans and options best suit them.
- Some child- and elder-care information or referral services may be available.
- Unpaid parental leave, beyond that which is legally required, is allowed.
- Varied benefits and services meet most employee needs.

25%

- Other (not legally required) employee benefits are provided.
- Benefit programs are "one-size-fits-all" and their value or relevance to employees is not monitored.
- Child-care and elder-care needs are seen as a responsibility of the employee that should not intrude in the workplace.

50%

# Category 7: MEASUREMENT, RESEARCH, AND ASSESSMENT

100%

- Integrated cultural assessments are conducted for the overall organization and within individual divisions.
- Many diversity-related research projects are conducted to address specific concerns and challenges, including broad issues such as corporate social responsibility, sustainability, human rights, etc.
- Employees provide input to all facets of the process of managing diversity, from needs assessment to evaluation, using processes such as 360-degree feedback.
- Accomplishment of diversity goals and modeling of diversity behaviors is factored into the performance ratings of employees at all levels.
- The organization knows the impact and return on investment of all components of its diversity initiatives.

- Integrated, multi-technique approaches to monitoring and evaluating diversity policies and practices are conducted; a diversity return-on-investment study has been conducted for at least one high-impact diversity initiative.
- Organizational culture is monitored as a critical factor in the success of future diversity initiatives.
- Research on specific diversity dimensions, issues, interactions, and systems is conducted.
- Employees at all levels are measured on their performance, based on diversity standards set by the organization.
- The organization regularly reviews diversity benchmarks, both within its industry/sector and across industries/sectors.
- Risk assessments are performed regularly.
- Diversity scorecard measures are linked to the organizational strategy and tied to incentive compensation.

75%

0%

- There are no systems and practices to gather information about employee or customer needs and concerns or to evaluate and monitor diversity-related issues.

- Diversity-specific instruments and techniques (e.g., a scorecard) are used to assess progress in general and specific diversity issues, as well as the impact of diversity initiatives on other organizational programs and current and future goals.
- Input from employees, former employees, and customers shapes initiatives, monitoring, and evaluation.
- Managers are individually measured on the execution of diversity goals specific to their areas of responsibility.
- Internal and external best practices are studied and benchmarking with similar organizations is undertaken.

50%

25%

- Some feedback and suggestions on diversity are solicited in general employee and customer surveys, market research, internal reviews, and climate studies.
- External best practices are studied.
- Representation of women and other groups is tracked and monitored.

# Category 8: RECRUITMENT, STAFFING, AND ADVANCEMENT

100%

- The overall workforce at all levels and functions is representative of the organization’s labor market.
- The organization’s culture and practices create a work environment attractive to potential and current employees, including members of previously excluded groups.
- A strong, diverse internal pipeline of future leaders exists with an ongoing process to sustain results.
- The organization takes innovative steps in retention and fosters a culture of inclusion.
- The organization’s reputation for quality diversity efforts makes it an employer of choice, thereby enhancing its chances of attracting employees who contribute to outstanding organizational results.

- Employees performing jobs in most levels and functions represent the labor market and meet or exceed the job requirements. They are not in their positions based on preferences or traditions.
- Recruitment sources are diverse, including using diversity career sites, participating in diversity career fairs, networking with internal and external diversity groups, and tapping informal leaders.
- Special efforts are made to place members of previously excluded groups in positions that serve as “feeder systems” or pipelines to management and professional positions.
- The talent management process is designed to focus on competencies, potential, and qualifications. Managers are aware of bias and integrate diversity into assessment and succession planning.
- Some employees receive mentoring or fast-tracking to help meet representation goals.

75%

- The organization has examined its practices, requirements, and culture and created strategies to reduce barriers that contribute to the exclusion of some groups and thereby increase retention.
- New hires and the overall workforce are beginning to reflect the diversity found in the organization’s labor market.
- There is still under-representation of certain groups in senior positions and some concentration of similar groups within certain functions.

0%

- There is no special effort to recruit, select, promote, or retain employees who add diversity to the employee mix.
- There is a culture of assimilation that encourages employees to fit into the existing culture.

- Hiring managers are not permitted to recruit and interview until they are educated in understanding cultural differences and their impact on hiring.
- External search firms are encouraged to present diverse slates of candidates.

50%

25%

- Members of previously excluded groups are represented in management and professional positions but at a lower proportion than in the overall organization.
- Little or no attention is given to diversity in retention or advancement.
- Statements in employment advertising, recruiting sources, and hiring goals provide encouragement to members of previously excluded groups.
- The focus in hiring is on representation and the organization has developed goals or targets.
- Firms contracted for recruiting do not specialize in diversity.



# Category 9: DIVERSITY TRAINING AND EDUCATION

100%

- The organization's diversity learning strategy addresses a broad spectrum of diversity dimensions and issues to meet the organization's mission, vision, goals, and performance management system. It includes a learning reinforcement strategy.
- Diversity training, including intercultural training, is integrated into the organization's general educational curriculum.
- Employees at all levels attend ongoing diversity training, including training for specific roles and responsibilities (e.g., customer service).
- Diversity education resources, including an extensive up-to-date library, are varied and fully supported by the organization.

- The organization provides to employees at all levels diversity training that focuses on knowledge about diversity, specific diversity dimensions, caring and compassion for others, and takes action to achieve the diversity vision; this training has been designed using proven instructional techniques.
- Employees in organizational functions critical to diversity management, such as human resources and customer service, receive additional diversity training.
- Diversity is included in other organizational training, such as supervisory training; diverse examples and techniques are used in training on any topic.
- Senior managers visibly endorse and voluntarily attend diversity training.
- Diversity professionals, managers, and employees help design, conduct, and reinforce the learning from training.

75%

- Both diversity and intercultural training are provided, but they are treated separately and as stand-alone courses rather than being integrated with other courses.
- Programs address difficult and sometimes uncomfortable issues of stereotypes, bias, and "isms," and include skill development.
- Diversity experts or training professionals design and/or conduct the training; line managers and employees are trained to help conduct or co-facilitate some sessions.
- Instructor guides or tool kits are provided to supervisors and managers with the expectation that they conduct training as part of team meetings.
- The organization's diversity website, resource library of books, articles, videos/DVDs, e-learning, and other tools are used to educate employees and managers.

0%

- There is no formal diversity education.
- Discussions on diversity are not encouraged.

50%

25%

- Training and resources on diversity are brief and focused on educating employees on policies and meeting legal requirements.
- Persons designing and delivering training do not have specific expertise in diversity.
- A small diversity resource library and some tools are available to managers.

# Category 10: DIVERSITY COMMUNICATIONS

100%

- On the organization's website (internet and intranet) diversity topics can be quickly located and its pages are robust and updated regularly.
- Leaders regularly communicate progress on reaching the diversity vision and goals internally and externally.
- The organization encourages and financially supports a wide variety of cultural celebrations, diversity events, and organization-wide activities, which are attended by a diverse group of employees, and combine social interaction with learning about diversity.
- The organization's communication functions – community affairs, employee communications, public relations, and marketing communications – consistently highlight diversity and share successes in internal and external communications.

- An accessible diversity website, available to all employees, links to diversity education websites. The organization's external website includes information about its diversity vision, goals, programs, and results.
- Most organizational events include some emphasis on diversity beyond cultural cuisine and celebrations.
- The organization realizes the positive role of diversity events and celebrations as teaching tools and works to maximize their impact. Some events are attended by people outside the organization.
- Senior managers promote the organization's vision and focus on diversity in internal and external speeches.
- All communications professionals and speechwriters are educated about the diversity vision and weave those messages into general organizational communication.

75%

- The organization sponsors a forum for employees to discuss diversity issues and to provide input to the organization.
- Examples of best practices are valued and shared. Through a variety of ways – a website, newsletter, e-mails, events, and so forth – employees learn the diversity vision, policy and business case.
- The organization's communication functions – community affairs, employee communications, public relations, and marketing communications – are supportive of diversity initiatives and weave diversity into other aspects of organizational communications.

0%

- There is no formal communication about diversity.

25%

- Some managers and employees talk about diversity informally, or videos and books might be available.
- No special diversity or cultural events are supported or encouraged.
- Someone in human resources or management occasionally reminds employees about policies and compliance requirements.

50%

# Category 11: PERFORMANCE IMPROVEMENT, TRAINING, AND CAREER DEVELOPMENT

100%

- All employees are supported in their development plan which is part of their performance contract.
- Programs are accessible to employees regardless of physical ability, language, schedule, location, learning style, or other differences.
- Training and development is considered a critical investment and is embedded in the organization.

- Employees are encouraged to participate in their career development and make their career goals known to their managers.
- Participation in the management development program is extended to high-potential employees in positions outside the usual management career ladder.
- Development through coaching, mentoring, and self-assessment is facilitated and encouraged.
- Some assistance and/or special programs are provided to members of protected groups.
- Funding and reimbursement of external programs is provided.
- Design and delivery methods ensure employees are exposed to a variety of cultures, markets, values, and practices.

75%

- Training and development for many employees and managers that covers technical, personal/interpersonal, and business skills is available.
- Some skills assessment, cross-training, apprenticeship, and job rotation programs exist.
- Performance improvement and training and development professionals are knowledgeable about diversity issues and consider them in all aspects of improving performance.
- Based on the nature and scope of work, accommodations are made for language, accessibility, family, schedules, and shifts.

0%

- There are no performance improvement processes, training, or other assistance available for acquiring needed skills for enhancing performance and career development.

50%

- The philosophy of job movement and promotion is one where managers make career, training, and development decisions for employees without consulting or considering their preferences.
- Employees do not take personal responsibility for their career development.
- Development is sometimes treated as an employee benefit or “perk.”
- The organization is beginning to analyze factors other than lack of training that may impact performance.
- Access to training and development is not equitable.

25%

# Category 12: COMMUNITY AND GOVERNMENT RELATIONS

(Note: This category will be impacted by the various legal requirements in different countries.)

100%

- The organization provides financial resources as well as employee time and labor in a variety of community projects; employees may be compensated for time spent working in the community.
- Facilities are located to serve and promote economic growth of the whole community, and particularly communities that have been historically ignored, or that are presently in the greatest need.
- The organization leads in supporting and advocating for diversity-related interests in government and societal affairs.
- The organization is generous in supporting and assisting other organizations in their diversity initiatives.
- The organization connects diversity with human rights, supports human rights, and speaks out on human rights.
- The organization thinks systemically, analyzing its social responsibility and investment policies (if for-profit) to consolidate initiatives.
- The organization's involvement in the community reflects long-range planning and all segments of the population.
- The organization sponsors scholarship and internship programs that positively impact both the community and its own future labor force.
- The organization supports the contribution of employee time and ideas to community concerns.

75%

0%

- There is limited or no involvement or support provided to the communities the organization is associated with or to any level of government.
- The organization makes an effort to involve itself with the concerns of community groups, especially those that may have been overlooked.
- The organization addresses social issues related to its mission and publicizes its social responsibility policy.
- Long-range community development plans are formulated with various groups, including local governments and community leaders.

50%

25%

- Motivated by public relations, marketing, tax reduction, and other benefits, the organization involves itself in mainstream causes, local government-related projects, schools, and the community.



# Category 13: PRODUCTS, SERVICES, AND SUPPLIER RELATIONS

100%

- The product-development cycle recognizes diversity from the outset. It doesn't merely "translate" or "adapt" products and services initially developed for the majority.
- Suppliers reflect the composition of the community along a broad range of dimensions.
- Suppliers are themselves required to have a significant percentage of their business with diverse suppliers.

- Changes in demographics, values, and lifestyles are anticipated and served.
- Product adaptations for people from various groups are made (e.g., shariah-compliant financial products, adaptations for people with disabilities, etc.).
- There is a commitment to increasing the number of diverse teams – including customers, non-customers, and community representatives – involved in the ongoing development of products and services.
- The organization seeks non-traditional suppliers and provides educational assistance about how to do work for the organization, often giving these firms added points in the selection process.
- A supplier database includes diversity information.

75%

0%

- There is an assumption that the current products and services will meet the needs of all customers.
- No consideration is given to diversity when determining suppliers.

- Products and services are analyzed for their value to all current and potential customers and tailored appropriately.
- Staff and/or consultants with expertise in diverse market segments are involved in product development and the revision of services or the creation of new ones.
- Diverse product-development and service-analysis teams are recognized as having innovative ideas that enhance products and services.
- A supplier-diversity program with policies and practices promoting the use of suppliers who may have previously been excluded is in place.

25%

- Research and product testing help analyze how different customer groups and cultures may use the organization's products and services.
- There is conversation about altering some products and services based on customer demographics.
- There is some attempt to include a few suppliers outside of the traditional sources.

50%

# Category 14: MARKETING AND CUSTOMER SERVICE

100%

- The organization has a sophisticated understanding of its customer base and its cultures, marketplace, and competitors.
- It is expected that the diversity and heterogeneity of customers will likely increase over time, and the ability to serve these differences well is a strategy for success.
- The organization uses a systemic, universal marketing and customer service approach while adapting to local situations.
- Customer service training addresses diversity by providing guidelines to respectfully address specific customer needs, interests, and comfort levels.
- Customer-satisfaction and quality survey results from a diverse audience are used to help shape marketing and customer service strategies.
- While outside diversity expertise is used regularly, some marketing and customer service staff members have expertise in diversity.
- Advertising, marketing, public relations, and customer service use a sophisticated approach to appeal to specific demographic groups and do not perpetuate stereotypes.
- Most marketing and customer service staff members have expertise in diversity, including linguistic diversity.

75%

0%

- The organization assumes its market is homogeneous.
- The organization's advertising and publicity perpetuates stereotypes and traditional roles.
- Customer service ignores differences in customer needs.
- There are some attempts to help different groups learn about the organization and its products.
- Some attempt is made to reach customers by using market-segment-specific media.
- Market test groups are diverse and encouraged to evaluate products and services for various groups and cultures.
- Agencies and consulting services with expertise in diversity provide advice regularly.
- Advertising, marketing, and public relations reflect diversity.

50%

25%

- The organization recognizes some broad differences among its customers and attempts to understand them.
- Products and services are marketed somewhat differently to different groups; advertising, however, is merely translated rather than being culturally adapted.

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