

Global Diversity and Inclusion Benchmarks: Standards for Organizations Around the World

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And 80 Expert Panelists

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Graphics and Symbolism. The spiral graphic shown on the cover and several pages signifies that the 100 percent level is not the end point as quality work in the future will potentially exceed what is currently considered global best practices. See the discussion on The Model for more graphic symbolism.

Standard and Book Versions Available. The Standard version is the best choice for viewing on a computer screen. It can be printed single-sided or double-sided. The Book version is the best choice for printing and binding the GDIB. It is designed to read like a book with some blank pages and the categories positioned on the right-hand side. It is best printed double-sided. Both the Standard and Book versions are available in U.S. Letter and A4 format. Download from www.diversitycollegium.org, www.omaraassoc.com, or www.qedconsulting.com.

Alternate Format. *Global Diversity and Inclusion Benchmarks: Standards for Organizations Around the World* is available in a Microsoft® Word version. Please contact us if you would like that version emailed to you.

Global English. We have followed many of the style principles of Global English using the book by John R. Kohl, *The Global English Style Guide: Writing Clear, Translatable Documentation for a Global Market*. We use American English spelling.

Continuous Improvement and Future Versions. Your feedback, suggestions, and stories of how you are using *Global Diversity and Inclusion Benchmarks* are welcomed. Please feel free to contact us.

Graphic Design and Layout by Marcus Longmuir.

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INTRODUCTION

We offer the *Global Diversity and Inclusion Benchmarks: Standards for Organizations Around the World (GDIB)* to all who believe in the value of diversity and inclusion and who are committed to continuously improving standards. It is a tool for helping organizations determine strategy and measure progress in managing diversity and fostering inclusion.

Diversity and Inclusion has emerged as a worldwide practice. As such, it requires standards to help ensure that the work is done at the highest quality level possible. We believe the GDIB lays the groundwork of what will be a constantly evolving journey that helps improve the quality of diversity and inclusion work.

This third edition of GDIB incorporates some shifts from the first edition published eight years ago, and the second edition published three years ago. No doubt there will be ongoing modifications where new best practices are identified, and current ones become less significant.

Definitions

There are many definitions of diversity, inclusion, and global as it applies to D&I work. We suggest that users research the literature to discover other definitions and select what works best for their organization. We define “diversity” and “inclusion” broadly.

Diversity

Diversity refers to the variety of differences and similarities/dimensions among people, such as gender, race/ethnicity, tribal/indigenous origins, age, culture, generation, religion, class/caste, language, education, geography, nationality, disability, sexual orientation, work style, work experience, job role and function, thinking style, and personality type.

Inclusion

Inclusion refers to how diversity is leveraged to create a fair, equitable, healthy, and high-performing organization or community where all individuals are respected, feel engaged and motivated, and their contributions toward meeting organizational and societal goals are valued.

Global

Global simply means that the GDIB applies to organizations around the world, although conditions and attitudes vary greatly worldwide. They are not limited to multinational organizations or those organizations that work internationally. And they are not specific to a country or culture. Many other differences may need to be taken into consideration as the GDIB is used. Those include culture, country specifics, approaches to D&I, sector/type of organization, organization size, diversity dimensions, and so forth.

BACKGROUND AND DEVELOPMENT

What is the original source of these global D&I Benchmarks?

Bench Marks for Diversity was first published by the Tennessee Valley Authority (TVA), www.tva.gov, in the United States in the early 1990s. It was based on foundational research. 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 was not copyrighted. It was revised several times, but had not been updated since the mid-1990s. We believe *Bench Marks for Diversity* had great merit and usefulness in providing a baseline for both organization development in the diversity arena and learning about best practices.

In 2006 we published the first version of *Global Diversity and Inclusion Benchmarks* – essentially updating the work of TVA with then current best practices from around the world making it a global tool usable anywhere.

In 2011 we published the second edition, making revisions from input provided by first edition users and our expanded Expert Panel.

In 2014 we are publishing this third edition to announce sponsorship by the nonprofit Diversity Collegium, to incorporate suggestions regarding the graphics and design of the GDIB including the Model, and to strengthen some of the information provided. However no changes that would impact the research or consensus of the Expert Panelists were made. We have plans to conduct a research update in 2015 for publication in 2016.

What does the future hold for D&I and these Benchmarks?

We believe D&I will continue to evolve as more and more individuals, organizations, communities, and countries gain experience and see the results that high-quality D&I efforts help achieve. These results include more integration of D&I throughout the entire organization or community – among all functions, departments, and stakeholders. It is possible that more conceptual frameworks will be identified and the work will be done under different names. It is also possible that D&I will become more entwined with social and political movements such as sustainability, ecology, and peace-building. As D&I work evolves and new learning, insights and innovations arise, we will work to incorporate them into the latest GDIB, scheduled for the next revision in 2016.

THE DIVERSITY COLLEGIUM SPONSORSHIP

The Diversity Collegium is extraordinarily pleased to become the first and primary sponsor of the *Global Diversity and Inclusion Benchmarks: Standards for Organizations Around the World*. As organizations and societies strive to create inclusive environments and approaches, a tool such as the GDIB provides important information, guidance, and support.

The Diversity Collegium is a think tank of practitioners, scholars and leaders whose mission is to advance the field of Diversity and Inclusion through dialogues, symposia, research and publications. Meeting for more than two decades, the group addresses and thinks critically about developmental stages and how to orchestrate and effect change among individuals, teams/groups, and organizations across sectors in this growing field.

The Diversity Collegium Vision:

Tap into the power of diversity and inclusion to transform the spirits, hearts and minds of societies, organizations and individuals to positively impact the quality of life for all human beings.

Membership in the group, which is limited to 25, is by invitation only and is managed so that a balance of diversity is created among its members including such dimensions as race/ethnicity, sector, gender, generation, and how one practices in the field. Current members come from the United States, Canada, the United Kingdom, and South Africa.

For more information about the Collegium's history and work, please visit our website: www.diversitycollegium.org.

The Diversity Collegium is particularly pleased to sponsor the *Global Diversity and Inclusion Benchmarks* because it is one of the first comprehensive tools to explain what creating inclusive systems and managing diversity entails. We appreciate that the tool represents the best thinking of 80 experts around the world. Extremely significant is that it is free for anyone to use; all that is required is to ask permission so that we can track users and learn from their experience. For these reasons, The Diversity Collegium believes our sponsorship of the GDIB offers an important way for us to achieve our mission of advancing the field.



The Diversity Collegium is a non-profit corporation registered in the State of Washington, USA, and has filed for tax exempt status as a 501(c)(6) professional association with the U.S. Internal Revenue Service.

RESEARCH PROCESS

What research process did you use to construct the GDIB?

The GDIB is based on the collective opinions and deep experience of the 80 Expert Panelists and the authors. It is not based on scientific research, however, many of the Expert Panelists either conduct or are familiar with D&I empirical research and thus some of that knowledge is reflected in their collective opinions. The research is based on several rounds of review by each Expert Panelist.

In 2006 we began with the *Bench Marks for Diversity*, researched and developed by the TVA. The GDIB authors updated and revised it and sent it to the Expert Panelists asking for comments and suggestions. Those were compiled by the authors and then that compilation sent again to the Expert Panelists so they could review and comment on the edits made by the other Expert Panelists. The authors then finalized the work making judgments on what to accept and what not to accept, although most suggestions were accepted unless there was a conflict. In some cases, the authors engaged some of the Expert Panelists in conversation and several rounds of additional reviews. Then this version was sent again to all the Expert Panelists asking for their consensus on the work.

For 2011 the Expert Panelist group was expanded with some original members leaving and new ones joining. The review process began with the 2006 version and a process similar to the one used to create the 2006 version was conducted.

For this 2014 version, the Expert Panelists were given the option to contribute suggestions for improvement in “look and feel” of the GDIB as well as improvements in the introductory material. Because the primary purpose in 2014 is to announce the Diversity Collegium sponsorship, we were clear that we did not want to make changes that would require Expert Panelist consensus in the content of the model and the benchmarks themselves.

The next round of research is planned for 2015 for a 2016 publication. The plans are to continue the research in a similar way to 2006 and 2011.

What supports the claim that the benchmarks at the 100 percent level are best practices?

A best practice is an approach or way of working that helps an organization reach its goals. We believe the benchmarks at the 100 percent level are current best practices for diversity and inclusion around the world. However, what is a best practice for one organization may not be a best practice for other organizations.

Is the GDIB validated or sanctioned by a professional association or independent organization?

No. Currently there is no worldwide organization that operates as a professional association for all/most conceptual frameworks (See page 8 for the Five Conceptual D&I Frameworks.) that can be considered part of the D&I field. There are some sector-specific, country-specific, and topic/dimension-specific organizations, as well as sub-groups of well-established professional associations that address portions of the field. We are aware of at least one professional association that is engaged in developing standards for D&I. Likewise there are some private, nonprofit, and educational organizations that contribute to the body of work of this young field. Perhaps in the future a professional association will exist that serves the entire field. There is no doubt that the “field” will evolve over time.

Have you done validity and reliability studies on the GDIB?

No. The GDIB is the collective viewpoint of the Expert Panelists and the authors, who bring years of knowledge and experience in the field of D & I. In the future, as the GDIB becomes more widely used, we anticipate further studies might be undertaken.

EXPERT PANELISTS

Who is on the Expert Panel and what are their contributions?

Because the GDIB is the collective viewpoint of the Expert Panelists it is critically important that the Expert Panelists truly be experts representing a broad variety of backgrounds and areas of expertise. Although there is no way to construct a perfect collection of “diverse” people with diverse experiences, we believe we have selected a solid group of Expert Panelists to achieve this work.

The depth and breadth of the GDIB is a testament to the process of including different viewpoints and perspectives. Not all members of the Expert Panel agree with all items and statements in this document. Despite all attempts to be as universal and all inclusive -- of organization size, sector, region of the world, diversity approach/conceptual framework, diversity dimensions, industry, and so forth -- as possible, the truth is that most people are at least somewhat centric to the various diversities they know best. Therein lies the value in having an expert panel comprised of a diverse group of people.

The Expert Panel members are listed on the next page. Because people move across both countries and organizations, and many have extensive global experience not limited to their current affiliation or location, we have listed names without affiliation, title, or location.

How were the Expert Panelists selected?

The authors determined the selection criteria, which were designed to result in a diverse group of experts who would be willing and able to contribute to the GDIB. Each person needed to have expertise in a broad scope of D&I work or a specific sector/type of organization, approach to diversity (which we call Conceptual Frameworks), culture, world region, and so forth. In addition we sought a variety of life experience that is represented by race, gender, sexual orientation, social class, nationality, generation, age, education, disability, personality type, and so forth. We were interested in the totality of their experience, not their current organizational position or location around the world.

Then the authors invited those they knew who met these criteria and then sought suggestions from them to recommend others. As the process evolved, the authors searched for areas where they felt additional expertise or a diversity dimension was needed.

In addition (for 2006 and 2011 versions) all members of the Diversity Collegium were invited to become Expert Panelists. Most chose to do so. With the publication of this edition, the Diversity Collegium has become our sponsor.

Are there additional areas of expertise needed to “round out” the group of Expert Panelists?

Yes. We would like more EP members with experience in Latin America and the Middle East. We have more EPs from the United States than any other country, although many do work internationally. We also want more expertise in healthcare, various other industries, and in some of the subsectors of education, as well as more members of younger generations.

How will future Expert Panelists be selected?

Future Expert Panelists will be selected in a similar manner as they have been selected in the past – using criteria and networking with a goal of creating a group willing to do the work of constructing the next version and having the varied backgrounds to do so. It is a volunteer assignment. If you want to recommend yourself or others to become an Expert Panelist, please contact the authors.

How can we learn more about the Expert Panelists and authors?

We have decided that with the Internet and services such as LinkedIn that we would not publish biographical sketches of each Expert Panelist. Furthermore, each individual is the totality of their personal and organizational experience and to capture that for each person is almost an impossible task. Short biographical information on the authors is included at the end of this publication.

What is the role and responsibility of the authors?

As authors, we:

- Are ultimately responsible for the final content,
- Make final decisions on who becomes an Expert Panelist,
- Manage the development and promotion of the GDIB,
- Manage the permissions and use process.

The Expert Panelists

Rohini Anand*	Lobna "Luby" Ismail	Rosalind Sago*
Redia Anderson	Kay Iwata	Cynthia Scott*
Jeya Ayadurai	Hans Jablonski	Johanna Sherriff*
Janet Bennett*	Helen Jackson	Srimathi Shivaskankar
David Benton*	Tisa Jackson	George Simons
Fleur Bothwick	Betsy Jacobsen*	Duncan Smith
Liliana Cantu	Carmen Jones	Jeremy Solomons
Price Cobbs	Prasad Kaipa * *	Donna Stringer
Stacey Cunningham*	Judith Katz	Charlotte Sweeney
Ralph de Chabert	Beverly Kaye*	Ruben Dario Taborda
Barbara Deane	Elisabeth Kelan	Parag Tandon
Maria DuPras*	Rui-Ling King*	Hiroko Tatebe
Emilio Egea	Lisa Kepinski	Tanya Cruz Teller
Mary Farmer	Gerald Landon*	Sondra Thiederman
Kim Farnham*	Lucy Linhares	Roosevelt Thomas 1944 -2013
Bernardo Ferdman	Juan T. Lopez	Adam Travis
Richard Gaskins*	Donna McNamara	Lillian A. Tsai
Jacey Graham*	Chris M. Mendoza	David Tulin
Judy Greevy	Nene Molefi	Lorie Valle-Yañez
Saehi Han	Margo Murray*	Josefine van Zanten
Steve Hanamura	Kenneth Nowack	Michael Wheeler
Robert Hayles	Heather Price	Lynda White
Peggy Hazard	Sidalia G. Reel	Mary-Frances Winters
Herschel Herndon	Margaret Regan	Avivah Wittenberg-Cox
Kimiko Horii	Jennifer "Jae" Pi'ilani Requiró	Rita Wuebbeler
Lucie Houde	Armida Mendez Russell	Nadia Younes
Edward E. Hubbard	Ann Sado	

* Served as an Expert Panelist on the 2006 version only.

* * Added in 2014.

THE VALUE OF THE GDIB

What is a benchmark?

A benchmark is another word for an organizational standard of performance. Benchmarks are usually described in language stated as an end result or outcome. They help people in organizations identify and describe high-quality results or aspirations. In a young field like diversity and inclusion, it is important to develop benchmarks since there can be a wide range in what people consider to be excellent work.

What is benchmarking?

Benchmarking is the process of comparing your organization to other organizations that are regarded as having successfully accomplished what your organization wants to achieve. Sometimes organizations benchmark within their organization (across divisions and regions for example), industry, size and/or sector. Benchmarking can be time-consuming and expensive. The GDIB can take the place of benchmarking and be a more cost-effective method for learning similar information, although the GDIB is universal and not specific to an organization's region, sector, size and so forth.

What Conceptual Frameworks of the D&I field does the GDIB cover?

There are many conceptual frameworks for understanding and categorizing D&I work around the world. Although terminology may vary by sector and location, some of the prominent conceptual frameworks include:

- 1) Social Justice / Social Cohesion / Fairness and Equity / Overcoming Oppression
- 2) Cultural Competence / Multiculturalism / Interculturalism
- 3) Organization Development / Strategic Diversity Management
- 4) Legal and Compliance
- 5) Social Responsibility

The GDIB includes aspects of all of these sometimes-competing frameworks.

What size organization can benefit most from working with the GDIB?

Medium and large organizations would probably benefit most because they potentially have more resources to deploy the staff, programs, and activities needed to achieve the benchmarks. That said, we believe small organizations will also find these useful, although more customization may be required.

Do these Benchmarks apply to all sectors and countries?

Yes. We have written the GDIB with all types of organizations and sectors in mind, including profit, nonprofit, education, healthcare, government, and community. In our efforts to make the Benchmarks as universal as possible, we have used general terminology and don't address specifics such as curriculum in education, life-saving cultural interventions in healthcare, shareholder return processes, and so forth. Those specifics, however, should be part of the organization's strategic plan and actions as described in Category 1: D&I Vision, Strategy, and Business Case. Some categories will be impacted by the various legal requirements in different countries.

How many benchmarks are in the GDIB?

There are a total of 280 benchmarks in 13 categories. We consider the benchmarks in the 75 and 100 percent categories to be the most important to meet.

How does the GDIB address legal requirements?

Legal requirements (such as Employment Equity and disabilities legislation) are an important aspect of D&I work. Some categories, such as Category 4: Recruitment, Development, and Advancement, will be impacted by the various legal requirements in different countries more so than other categories. Many organizations consider legal requirements to be the threshold for D&I work and place it as a minimum requirement under a broader D&I umbrella. We hope that legal requirements are not the main reason for D&I work.

Is there a values basis for the GDIB?

Yes, indirectly. The United Nations' Universal Declaration of Human Rights published in 1948 is a worldwide platform supporting a range of global values including diversity and inclusion. There are also a number of related UN Conventions, such as the one on disabilities, that impact D&I.

Why should organizations engage in D&I? What is to be gained from the effort?

D&I can be seen both as an end in itself, as a value, and therefore the right thing to do, and also as a means to an end. It is "good for business," since it will increase engagement, morale, productivity, quality, profitability, creativity, innovation, and so forth.

Is the D&I field too young to have benchmarks or standards?

We don't think so. By most accounts the field has been in existence for up to four or five decades in some countries. Over this time, a vast collection of papers, articles, conference proceedings, books, benchmarking studies, and websites have shared collective practices many consider to be examples of quality work.

What organizations are considered best practice organizations in diversity and inclusion?

There are several organizations that are often mentioned as doing great work in diversity and inclusion. Stories about what they are doing appear frequently in the professional literature. Often these are large organizations that have been doing this work for some time, have solid diversity and inclusion functions and reputations, and invest knowledge, time, and resources in their efforts. We are confident that there are many other best practice organizations that are not well known. We plan to share examples of organizations doing best practice work on the Diversity Collegium website, www.diversitycollegium.org.

How can you be sure the GDIB crosses cultures?

In our view and that of our 80 Expert Panelists, the GDIB can be used across many, if not all, cultures.

Does the GDIB encompass all aspects of diversity and inclusion?

We believe the GDIB encompasses the main aspects of diversity and inclusion. However, there are many different conceptual frameworks (See page 8.), approaches, and ways to practice D&I. In addition, there are many definitions of diversity, valuing diversity, managing diversity, inclusion, and related terms. There is no group or organization with the responsibility or authority to declare which is the "right" definition or approach. Practitioners around the world debate definitions on an ongoing basis.

How do you achieve these benchmarks?

These benchmarks can be achieved through knowledgeable, skillful, professional work. *Global Diversity and Inclusion Benchmarks* is not a "how-to" guide. It is simply a description of excellent, medium, and poor D&I standards and outcomes. In order to know how to achieve the benchmarks at the higher levels, users will need to research literature, tools, and experts in the field.

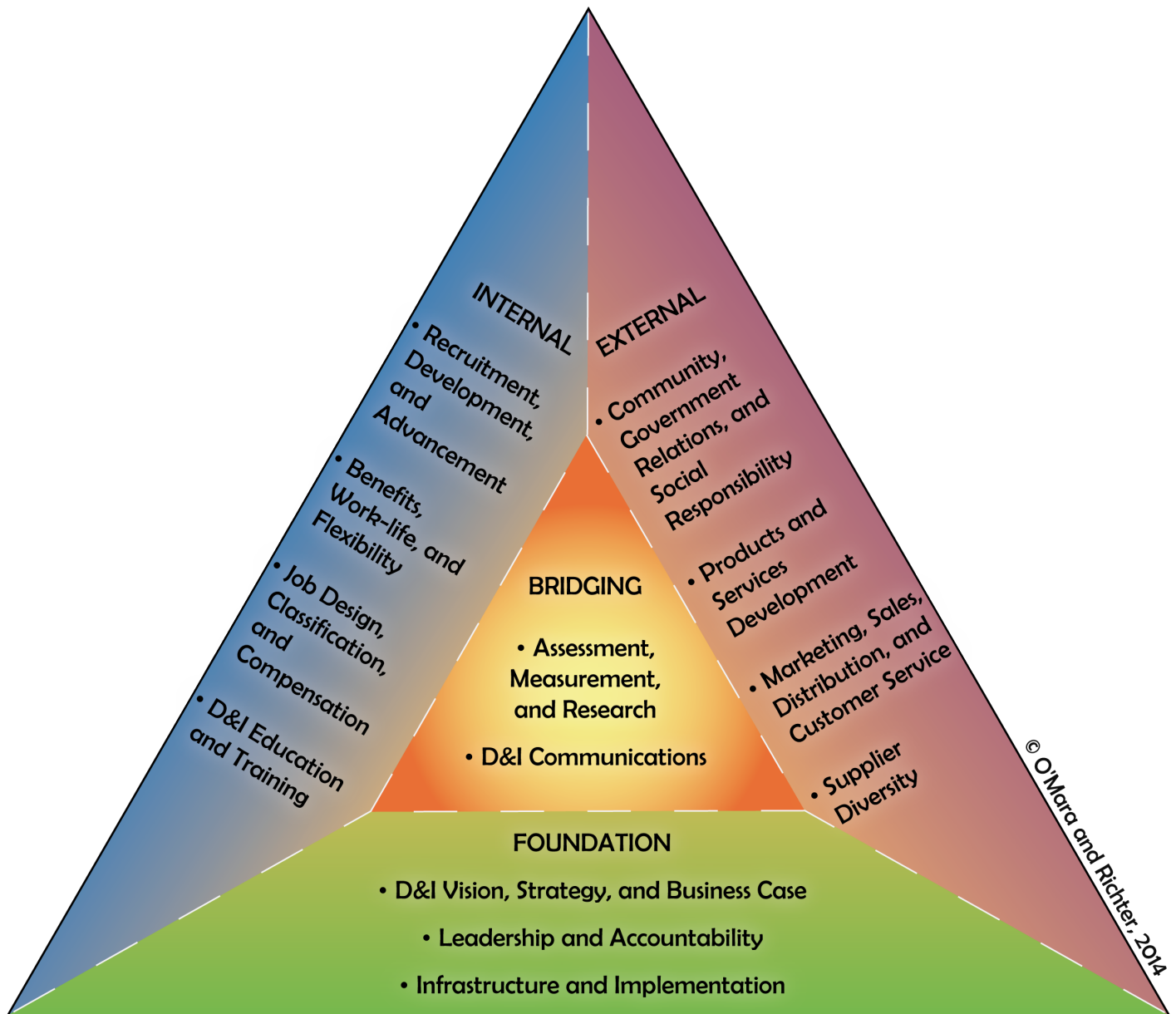
How do benchmarks relate to competencies and behaviors?

Competencies and behaviors describe the actions, steps, skills, knowledge, ability and capability individuals need to have to achieve goals and meet benchmarks/organizational standards.

THE GDIB MODEL

We believe the 13 categories that are organized into four groups cover the key areas that need to be addressed to create a world-class diversity and inclusion initiative. Each category is divided into five levels, with the benchmarks at 100 percent level considered best practice. Most organizations will need to address all the Foundation and Bridging Categories. Organizations may be more selective about which of the Internal and External Categories to address. Covering all 13 categories is the most comprehensive and systemic approach.

The Model



Global Diversity and Inclusion Benchmarks Model

Graphic Symbolism of the Model

This model shows the relationships of the four groups and 13 categories. The equilateral triangle symbolizes equality and strength – two tenets of D&I. The Foundation Categories form the base of the triangle. The Bridging Categories are displayed as a smaller equilateral triangle in the center of the larger triangle, abutting not only the Foundation Categories but also both the Internal and External Categories.

The lines separating the four groups are dashes symbolizing permeability and how all categories operate as a system. For example, while recruitment is part of the Internal group, some talent is sourced externally and, therefore, successful recruiting is dependent on the organization's reputation in the community, a part of the External group. Likewise customer service, part of the External group, is enhanced by effective training and development, part of the Internal group. Communications is in the Bridging group because it enables the strategy to be known by all those impacted internally and externally. Strategy, Leadership and Infrastructure are Foundation Categories because they are necessary to the effective operation of all other categories.

Each organization will need to determine its priorities based on the importance of each category to its mission. Some of the Internal and External Categories may not be addressed at all.

Foundation Categories

The three categories we consider foundational are those used to build a D&I initiative.

Category 1. D&I Vision, Strategy, and Business Case.

Covers the organization's overall approach to D&I, its articulation of the value of D&I, the requirements of managing D&I, and how D&I is embedded in the organization.

Category 2. Leadership and Accountability.

Covers the responsibilities of the organization's leadership in shaping, guiding, leveraging, and accounting for D&I.

Category 3. Infrastructure and Implementation.

Explores the way the organization structures or organizes its D&I function so it can effectively carry out its D&I goals.

Internal Categories

The four categories in this group focus primarily on strengthening how the organization operates and how the effectiveness of people is increased.

Category 4. Recruitment, Development, and Advancement.

Describes the creation of a culture of inclusion that enhances professional excellence and supports selection, retention, and advancement. Ensures that D&I is an important part of hiring and selection.

Category 5. Benefits, Work-Life, and Flexibility.

Describes the way work is organized and the extent of flexible work arrangements. Gauges the benefits and services provided to employees to meet their needs and concerns.

Category 6. Job Design, Classification, and Compensation.

Explores the way jobs are designed, classified, compensated, and assigned. Includes assessment of reward and recognition systems and how an organization is fair and equitable.

Category 7. D&I Training and Education.

Explores D&I awareness, skill-building training and education, and the integration of such training into all training and development. Explores the extent to which performance improvement and training are provided equitably.

Bridging Categories

The two categories in this group are critical linkages that bridge foundational work with the internal and external focus of D&I in the organization.

Category 8. Assessment, Measurement, and Research.

Evaluates the way D&I is measured, whether the organization does research to support D&I strategies, and the organization's assessment processes around diversity, inclusion, and organizational culture.

Category 9. D&I Communications.

Describes how D&I is articulated, promoted, and embedded into the organization's internal and external communication strategy.

External Categories

The four categories in this group relate to how the organization offers its products and services and interacts with its customers and other stakeholders.

Category 10. Community, Government Relations, and Social Responsibility.

Covers the organization's efforts to engage and invest in its communities. This category also covers government relations and social responsibility.

Category 11. Products and Services Development.

Gauges the organization's recognition of the diversity of its customer base and its effectiveness in designing and delivering products and services to current and future customers.

Category 12. Marketing, Sales, Distribution, 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 distribution, sales, and marketing strategies, thereby attracting and satisfying prospective and current customers.

Category 13. Supplier Diversity.

This includes the processes of selecting, contracting, and interacting with the organization's suppliers and vendors in a manner that supports and grows D&I values and goals along the supply chain.

The Five Levels

The best practices in each category are shown as 100 percent. For each category, the benchmarks are divided into five levels that indicate progress toward the best practices in that category:

- At 0%: No D&I work has begun; appreciation of diversity and a culture of inclusion are not organizational goals. We avoided negative percentages, so for example, a pervasively harassment-filled work environment would be lower than 0%.
- At 25%: Compliance mindset at best; symbolic actions only.
- At 50%: Beginning of a programmatic thrust; moving in a healthy direction.
- At 75%: Seeing D&I systemically; a robust D&I approach.
- At 100%: Current best practices in D&I around the world.

Going beyond 100 percent would make your organization a "pioneer" and probably a model for the next GDIB update. For this reason we chose the spiral graphic to symbolize that 100 percent is not an end-point.

HOW TO USE THE GDIB

Why use this tool?

There is an old adage in organization work: It is hard to manage what you cannot measure. We believe that by providing global standards organizations can take notice of their “current state” of D&I, compare against their “desired” state, and be able to see the gap between current and desired state.

Should you use the GDIB as a prescriptive or descriptive tool?

Organizations that do benchmarking may look upon the GDIB as prescriptive for success or simply as descriptive of current best practices. We believe the descriptive approach is safest, as the context is critical in assessing the importance and relevance of the GDIB. In one context one might ignore a best practice, while in another context it may be a critically sought factor. It is imperative not to automatically follow these benchmarks, but to first evaluate their relevance and importance to your organization.

How do you evaluate the relevance of the GDIB for your organization?

The GDIB will be relevant to most organizations. We stress that it is key to view D&I systemically. Organizations should focus on the categories most important to them, based on objective analysis of the gap between current and desired states, considering context, geographic, cultural, stakeholder, and other factors.

To what degree can we customize the Benchmarks?

This is difficult to answer. The GDIB is universal and we know that it will not apply equally to all organizations. If you change the Model to remove one of the four groups then that would be, in our opinion, too radical a change to the GDIB. Likewise if you moved some of the Benchmarks at the 25 percent level into the 100 percent level that would also be an inappropriate change. However, if you changed the word “employees” to “associates,” that would be acceptable. See the information and agreement on the permissions process at www.DiversityCollegium.org or contact the authors.

Are there some Categories that all organizations should use?

We believe that organizations need to include the Foundation Categories in their work as they are necessary to determine focus and sustain quality in all the other categories. Similarly, the Bridging Categories will likely be used by most organizations.

What cautions or limitations should we be concerned about when using the GDIB?

There are several. If you are not experienced in working with D&I we recommend you hire a staff person and/or a consultant with significant experience to assist you. When using the GDIB to rate your organization’s progress, remember that when you ask for opinions you are getting just that – opinions. Opinions are perceptions. Some individuals and cultures will tend to give higher ratings – the “benefit of the doubt” and others will be more negatively critical and rate lower. Whenever possible, provide objective and factual information.

Rating the effectiveness of an organization is challenging. We caution against trying to make a blanket statement, such as “our organization is at 50 percent.” While that might be true generally, it is more likely that the organization as a whole, and its departments and functions, may be at different levels in various categories.

What are some effective ways to use the GDIB?

- **To set and stretch standards and agree on the desired state of D&I in your organization.** Use the GDIB to set organizational achievement standards for D&I. This would be part of a strategy setting and planning process. Likewise, use the Benchmarks to help stretch your existing standards as you strive toward excellence.
- **To assess the current state of D&I in your organization.** To determine the current state, use a cultural audit to gather factual information and request opinions from individuals inside and outside your organization, if your organization has the ability to use outside resources.
- **To engage employees.** A way to engage employees in this process is for groups to discuss selected categories and strive to reach consensus on the level at which their departments or organizations currently rate. If no consensus can be reached, have them determine the narrowest agreed-upon range. Repeating this process with different organizational teams provides some objective measure, and tracked over time, it can show the organization's progress in the chosen areas. Completing this process with leaders is critical to obtaining their support for any D&I initiative.
- **To determine short-term and long-term goals.** Once you know which benchmarks you want to attain, you can use the levels as stepping stones to set short- and long-term goals. There will be some goals set specifically for the D&I function, but many of the D&I goals will be established by a variety of organizational functions and locations depending on size and other factors. Integrate your D&I goals into any goal-setting process that your organization has in place.
- **To measure progress.** When you are in the process of setting goals, you will need to determine how to measure the achievement of those goals. Again, we suggest you apply whatever process your organization uses to measure achievement of other organizational goals. For example, if your organization uses an employee opinion survey or a customer satisfaction survey, you may want to use the GDIB to craft wording for some of the survey items.
- **To assist in hiring D&I staff and consultants.** Use aspects of the GDIB to craft questions for the interviewing process. Write questions from each of the 13 categories to assess the breadth and depth of your candidate's experience. Based on the categories, ask them to describe their experience and then determine if it matches the work you expect them to do.

What cautions or limitations should we be concerned about when using the GDIB?

There are several. If you are not experienced in working with D&I we recommend you hire a staff person and/or a consultant with significant experience to assist you. When using the GDIB to rate your organization's progress, remember that when you ask for opinions you are getting just that – opinions. Opinions are perceptions. Some individuals and cultures will tend to give higher ratings – the “benefit of the doubt” and others will be more negatively critical and rate lower. Whenever possible, provide objective and factual information.

Rating the effectiveness of an organization is challenging. We caution against trying to make a blanket statement, such as “our organization is at 50 percent.” While that might be true generally, it is more likely that the organization as a whole, and its departments and functions, may be at different levels in various categories.

SCORING THE GDIB

Two approaches to scoring – intuitive and mathematical – are described below. These approaches apply to any selected GDIB category, group of categories, or all of the categories. Both approaches should not be confused with any statistical or quantitative validation. At best, the percentage you determine, using either method, remains more of an estimate than an accurate calculation.

We recommend using a series of group or team processes, as multiple perspectives can enhance the quality of the work. Regardless, all perceptions are valid, and should be acknowledged as such.

Step 1: Identify individuals or groups to participate in the assessment or measurement process.

You may engage a department, diversity dimension group, level or location or some other specific group in your organization. Or you may want the groups mixed.

Step 2: Determine which category or categories you want to assess or measure.

Step 3: Check (tick or mark) all benchmarks that individuals or the group agrees the organization has achieved or is currently at, based on perceptions, from 0% to 100%.

Step 4 for the intuitive approach: Review the aggregation from Step 3 and make an intuitive decision, for example: "It seems as if we agree that our organization is at 50 percent in this Category." Or you can agree on an intuitive range, such as "It seems as if we are at no less than 40% but no more than 50%."

Step 4 for the mathematical approach: Do a numerical calculation of the benchmarks checked at each level.

A. Calculate as follows, for example: If you checked one benchmark at 100% = $1 \times 100 = 100$; two at 75% = $2 \times 75 = 150$; 3 x 50 = 150; 1 x 25 = 25; 0 x 0% = 0, that makes a total score of 425.

B. Next divide that number by the total number of checked benchmarks. In this example $1+2+3+1+0 = 7$ --- so 425 divided by 7 = 60.7, which can be rounded to 61%.

Use a simple average to find the group's opinion. For example: If 80 people are involved in the strategy setting or measurement process, take each individual's score (in our example above that would be 61%. If you want to be precise, use the actual, not the rounded number), total all the individual scores and divide by 80. That will give you a numerical picture of the group's opinion. With the mathematical approach you always will have an exact number for a category; there is no estimated range. However, this is still a subjective perception.

Step 5: This last step is strategic and involves determining what to do next to achieve the higher levels and setting goals to get there. If you are trying to measure progress against a baseline score or previous goals set, you will need to examine what (and why) progress has been made.

TERMINOLOGY

To avoid repeating lengthy terminology throughout the document, the following terms are defined below:

- We simply refer to “D&I,” which is shorthand for “diversity and inclusion.”
- We use “diversity networks,” to mean and include employee networks, resource groups, affinity groups, worker councils, and so forth.
- We refer to equal opportunity (in lower case) to avoid describing country-specific legislation or compliance.
- We use “underrepresented” 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. This covers protected groups or protected classes identified by some legal systems and those groups sometimes referred to as disadvantaged or underprivileged.
- We use “senior diversity professional” to designate the person heading the D&I initiatives or the chief diversity officer in an organization. This person has expertise in D&I but may or may not be a full-time diversity professional. We want to distinguish the top executive or leader of the entire organization from the organization’s highest-ranking person with specific responsibility for D&I. While we believe that the top executive should also have D&I responsibility, we also believe it is important to have a senior person in the organization with specific knowledge of D&I.
- We use “leaders” to describe everyone in the organization who has responsibility for showing leadership to accomplish the organization’s 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.
- We have attempted to use inclusive language acceptable to all types and sectors of organizations. There is evidence that some terms that originated in one sector are becoming acceptable in others. For example, we find that the “business case” for diversity is generally an acceptable term in government and nonprofit organizations.

OUR ENCOURAGEMENT

We encourage organizations to aspire to be the best place to work from a diversity and inclusion perspective. Leveraging diversity and fostering inclusion is key to making the world a better place to live and work in, one organization at a time.

Please keep us informed about the work you are doing and share any ideas you have to strengthen *Global Diversity and Inclusion Benchmarks: Standards for Organizations Around the World*.

Julie O’Mara

O’Mara and Associates

Alan Richter, Ph.D.

QED Consulting

Category 1: D&I VISION, STRATEGY, AND BUSINESS CASE

100%

- D&I has become embedded in the culture of the organization and is not seen as an isolated program, but rather as a key value and a means to growth and success.
- All the major components of D&I, including vision, strategy, business case, goals, policies, principles, desired behaviors, and competencies are regularly reviewed to leverage opportunities for organizational success.
- All employees and the board of directors demonstrate that D&I is aligned with and integral to organizational success.
- The organization credits accomplishment of its D&I strategy for contributing to its overall success.
- The organization is known as a leader in D&I and is frequently benchmarked for its D&I accomplishments.
- The organization's strategy includes pioneering D&I components.

75%

- The organization's vision and goals, as well as the requirement to embed equity, prevent harassment, reduce discrimination, and so forth are fully supported; violations of diversity-related policies are not tolerated.
- It is acknowledged by the majority of stakeholders that D&I is important for contributing to the success of the organization and it is "the right thing to do."
- Organizational functions, locations, and market areas have a business case and annual goals based on their specific D&I-related needs and issues.
- D&I is included in organization-wide strategy meetings, including meetings on R&D, marketing, risk management, community involvement, and mergers and acquisitions.

0%

- There is no articulated D&I vision, strategy, business case, goals, policies, principles, desired behaviors, competencies, or program.
- There is no linkage of D&I to the vision, mission, and goals of the organization.

50%

- The organization has examined its practices, requirements, and culture and created strategies to reduce barriers to inclusion.
- D&I is defined broadly.
- A compelling D&I vision, strategy, and business case has been communicated to all employees. It enables the achievement of organizational goals and describes the multiple ways the organization benefits from D&I.
- D&I individual behaviors and expectations that help achieve the strategy are known by all employees.
- Annual D&I qualitative and quantitative goals that include input from a variety of internal and external stakeholders are being developed.

25%

- If a D&I strategy exists, it is limited to human resource functions.
- Diversity is narrowly defined, referring to some underrepresented groups. The focus is primarily on numbers of people from various groups represented at different organizational levels.
- Equal opportunity, compliance, disability access, age discrimination, or other diversity-related policies have been communicated to prevent damaging legal action and publicity.

Category 2: LEADERSHIP AND ACCOUNTABILITY

100%

- ❑ Management performance, pay, bonuses, and promotions are tied to a variety of D&I indicators. Leaders are accountable for implementing the D&I strategy in all areas of the organization.
- ❑ Senior leaders are seen as change agents and role models and inspire others to take individual responsibility and become role models themselves. They routinely discuss the importance of D&I as a core organizational strategy, and 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 D&I is systemic and designed to strengthen the organization's culture. They are fully committed to the organization's D&I work.
- ❑ In surveys, a large majority of employees across a range of diversity dimensions rate their leaders as treating them fairly and inclusively.

75%

- ❑ All employees are involved in D&I initiatives; rewards and/or recognition are given to D&I champions and advocates.
- ❑ Everyone takes individual responsibility for achieving what the organization expects of them regarding D&I. All employees are held accountable for demonstrating behaviors and taking action to help achieve the organization's D&I goals.
- ❑ Leaders support and are actively involved in diversity networks and advocate for the development of underrepresented talent.
- ❑ Leaders make internal and external speeches or statements relating to D&I to a variety of groups.
- ❑ The board of directors is diverse, is engaged in D&I issues, and holds the leadership team accountable for achieving the D&I vision aligned with business goals.
- ❑ Leaders receive coaching in D&I and provide coaching to others.
- ❑ Managing D&I is considered an essential leadership competency.
- ❑ Most leaders in the organization can articulate the D&I strategy, business case and goals, including how D&I enables the achievement of the organization's vision, mission and goals.

0%

- ❑ There is little or no leadership, involvement, or accountability regarding D&I.
- ❑ Leaders consistently see differences as potential for problems, rather than opportunities for enrichment.

50%

- ❑ Leaders view managing D&I as one of their responsibilities.
- ❑ Senior leaders willingly make speeches and public statements, but these are usually limited to diversity-specific functions, projects, or events.
- ❑ Senior leaders sponsor diversity networks.
- ❑ Leaders understand that D&I is about treating people fairly rather than the same (equally) and strive to accommodate differences; tolerance is understood as both not giving and not taking offense on the part of self and others.

25%

- ❑ Leaders accept some responsibility for D&I, especially as it relates to equal opportunity.
- ❑ Leaders require instructions and/or scripts to discuss D&I.
- ❑ Reactive measures are taken to deal with difficult D&I situations.

Category 3: INFRASTRUCTURE AND IMPLEMENTATION

100%

- ❑ The senior D&I professional is a member of the senior management team, is treated as an equal partner, and serves as a diversity coach to its leaders.
- ❑ Employee teams or change agents exist throughout the organization to advise on and drive D&I change efforts. They are rewarded and compensated for their work.
- ❑ D&I councils/committees work collaboratively with D&I professionals, the senior management team, and labor unions, if present in the organization.
- ❑ Diversity networks are treated as business partners and are engaged to support organizational goals. They may advise on marketing, recruitment, risk management, and so forth.
- ❑ The organization lives its D&I values; it supports the raising of D&I issues, concerns and opportunities, and encourages ideas from all employees.

75%

- ❑ There are adequate resources and a structure designed to assure full implementation of the organization's D&I strategy and plans. Even if D&I staff is decentralized they are in alignment with implementing the organization's strategy.
- ❑ The D&I function is headed by a senior leader who regularly interacts with the board of directors, and is supported by a knowledgeable staff of professionals, adequate for the size and goals of the organization.
- ❑ Diversity networks have access to the organization's senior leaders and decision-makers.
- ❑ D&I councils/committees in departments or divisions exist, and are in alignment with the organization's strategy.
- ❑ D&I professionals are viewed as change agents and, as such, collaborate with other organizational functions.
- ❑ If the organization has labor unions, they are fully engaged in the D&I effort.

50%

- ❑ There is a D&I manager and staff with responsibility for D&I.
- ❑ Diversity networks exist and have some support.
- ❑ An organization-wide D&I council/committee is given visible support by leaders, represents internal stakeholders, and has some influence on D&I efforts.
- ❑ An adequate budget has been allocated to cover implementation.
- ❑ There is awareness in the organization about the role and function of the D&I team.

0%

- ❑ There is no organizational infrastructure or budget for D&I.
- ❑ No one in the organization has formal responsibility for addressing diversity issues.

25%

- ❑ D&I functions are performed as an additional, secondary duty of human resources and/or legal staff.
- ❑ Informal diversity networks and D&I committees may exist, but they have no real power or influence in the organization.
- ❑ There is little awareness in the organization about the role and functions of the D&I team or committee.
- ❑ Leaders from underrepresented backgrounds are assigned to lead D&I initiatives and programs in addition to their regular jobs.

Category 4: RECRUITMENT, DEVELOPMENT, AND ADVANCEMENT

100%

- The organization's talent development processes have resulted in equitable recruitment, retention, advancement, and a pervasive feeling of inclusion.
- The overall workforce crossing all levels and functions is generally representative of the organization's labor markets; it manifests the perspectives and behaviors needed to serve diverse markets.
- The organization's reputation for quality D&I efforts makes it an employer of choice, enhancing its ability to attract and retain employees who contribute to outstanding organizational results.
- Talent is developed and advanced based on competencies most needed for the organization. Doing so usually results in diverse senior leadership.
- High potential diverse talent is provided with internal coaches, mentors and external coaching opportunities to maximize performance and develop advanced careers within the organization.

75%

- Recruitment includes advertising on diversity-focused career websites, using social media, and networking with internal and external diversity groups.
- Recruitment and selection panels include the diverse population the organization wants to attract and advance.
- Employees are in their jobs based on meeting job requirements, rather than stereotypes, preferences, or traditions.
- Special efforts are made to place members of underrepresented groups in positions that serve as "feeder systems."
- Talent management focuses on competencies, potential, and qualifications. Leaders are aware of potential bias and integrate D&I goals into talent management.
- Employees may consider development opportunities and positions outside their current functional, technical, or professional area.
- Development through self-assessment, coaching, mentoring, serving on task forces, and participating in visible projects is encouraged and open to most levels and functions.
- Employees are exposed to a variety of cultures, markets, values, and practices as part of development.

50%

- The workforce is beginning to reflect the diversity found in the organization's labor market, but there is still underutilization of certain groups in senior positions and some concentration of similar groups within certain functions.
- Hiring managers are educated in understanding cultural differences and the impact their biases may have on decisions.
- External search firms are selected based in part on presenting diverse slates of candidates.
- The organization offers a variety of development programs and encourages employees to take advantage of them.

0%

- There is no special effort to recruit, select, advance, or retain employees from underrepresented groups.
- There is a culture of assimilation that requires employees to fit into the existing culture.

25%

- The hiring focus is based on representation and meeting equal employment opportunity goals or targets.
- Firms that are contracted for recruiting are not knowledgeable about diversity recruitment and do not provide diverse slates.
- Advertising states that the organization is an equal opportunity employer, but in actuality that may not be the case.
- The majority of talent management decisions are made without consulting employees or considering employee preferences.
- Recruiting and access to training and development is not equitable.

Category 5: BENEFITS, WORK-LIFE, AND FLEXIBILITY

100%

- Leaders have the skills to respond to requests for flexibility and model work-life balance.
- Part-time, job sharing and flexible work arrangements are available for all appropriate positions. Their use, which leaders encourage, does not negatively impact career development or progress.
- The organization accepts diversity in language, dress, physical appearance, non-traditional schedules and leave, as fully legitimate.
- A full range of flexible benefits and services, including education and counseling, are provided based on employee needs, wants, and the organization's financial ability to provide them.
- Significant others, same-sex, and transgender partners are included in organizational events that previously excluded them.
- Based on research and assessment, benefits and services are adapted to changing conditions and innovative ideas. Examples include: compensation and scheduling based on performance and results only; providing pay differentials to equalize unfair taxes; and supporting the transition of transgender employees.

75%

- Paid leave, beyond what is legally required, is provided. This may include care giving for spouses, domestic partners, children, and adult dependents.
- Work-at-home, job-sharing, and part-time work is allowed for selected positions.
- The culture is accepting of those who work flexible schedules.
- Health and fitness benefits include education, clinics, fitness centers, employee assistance programs, and preventive care.
- Family-friendly services include subsidized childcare and eldercare (on-site or outsourced), lactation rooms, and emergency care.
- Accessibility and accommodation for people with disabilities is supported.
- Benefits and services are culturally sensitive.
- Policies and practices guard against favoritism and inconsistencies.

50%

- The organization understands employees have responsibilities outside of work so some work-schedule flexibility, work-at-home, and part-time options are available.
- Paid leave is provided for health care, civic responsibilities, bereavement, and so forth. Unpaid leave for childcare and eldercare or emergencies is allowed. Information and referral services are available.
- Language needs and physical access are accommodated when market forces are compelling.
- Religious practices and cultural holidays are mostly accommodated even if they are not the holidays of the majority.
- Flexibility in dress and personal appearance is allowed for most employees.
- Some flexible benefits are monitored for fairness and suitability to changing conditions; employees have input on benefit programs.

0%

- Only legally required employee benefits and services are provided.
- Little or no schedule flexibility or work leave is provided.
- Work schedules and workplace rules are defined based on management's preferences and traditions of "normal" and "appropriate."

25%

- Benefit programs are "one-size-fits-all" and their value or relevance to employees is not monitored.
- Childcare and eldercare needs are seen as an employee's responsibility that should not interfere with work.
- Work schedules are determined by managers, and tend to be inflexible and compliance-driven. If accommodations are made, they are applied inconsistently and may be perceived as favoritism.
- There is some flexibility in allowing employees to personalize their workspaces and their dress.

Category 6: JOB DESIGN, CLASSIFICATION, AND COMPENSATION

100%

- ❑ The organization has equitable compensation and classification practices.
- ❑ Innovative job design results in employees being paid for performance rather than “putting in time,” enabling them to work flexibly based on their needs and wants.
- ❑ Inequitable, past compensation systems such as gender-based pension enrollment dates that may have resulted in current inequities have been addressed and individuals compensated.
- ❑ Reward and compensation systems have been designed specifically to reduce bias in recruiting, hiring, retention and advance the development of high-performing talent.
- ❑ For corporations, stock options and profit sharing are offered fairly throughout the organization.
- ❑ The organization utilizes balanced scorecards or similar methods as part of its compensation system to ensure that conscious and unconscious bias is reduced.

75%

- ❑ Classification and compensation systems have been modified to address hidden biases and assumptions, and to ensure equity.
- ❑ Job requirements and descriptions are clear and not confused by non-performance factors such as style, gender, school graduated from, religion, age, or appearance preferences or traditions.
- ❑ There is increased acceptance of flexibility and variety in job design to accommodate employee needs for part-time work, working non-standard hours, and taking leave for personal or other reasons.
- ❑ The organization ensures that an annual pay gap analysis is conducted to confirm that biases based on race, age, gender, organizational function, and other potential equity issues do not reappear.

50%

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

0%

- ❑ The organization lacks systematic methods for classifying jobs or determining employee compensation.
- ❑ Some jobs are thought to be “a better fit” for certain groups, based on stereotypes, such as men, younger workers, or people with disabilities.

25%

- ❑ Some written procedures exist for classifying jobs and determining compensation. However, supervisors’ personal preferences are the major determinants.
- ❑ There is a policy or guideline stating that equal pay for equal work is the norm, but the organization does not conduct an analysis to ascertain if the policy or guideline is followed.

Category 7: D&I EDUCATION AND TRAINING

100%

- D&I training and education includes learning reinforcement, application and sustainability strategies.
- D&I training and education is an on-going, multi-year, developmental curriculum that takes individuals through graduated stages of learning.
- Learning is customized to meet changing local situations, ensuring that it is not global at the expense of local or local at the expense of global relevance.
- A variety of innovative D&I tools, including an extensive library, are accessible to all, fully supported, and shared externally.
- D&I is integrated into all training and education and advances the organization's strategy. Leaders have knowledge and skills needed to demonstrate D&I behaviors and competencies.
- Challenging and sometimes controversial issues such as racism, sexism, ageism, classism, homophobia, religious bias, and unconscious bias are addressed with sensitivity, conviction, and compassion.

75%

- In addition to general D&I training, employees receive training specific to their level and areas of responsibility.
- Some training and education is available to members of specific groups, such as women, younger workers, and those who do not speak the dominant language of the organization. However, it is not assumed that all members of those groups need or desire that special training and education.
- D&I professionals, experts in learning methods and cross-cultural education, organizational leaders, and representatives of various stakeholders are involved in the development, delivery, and reinforcement of D&I training and education.
- D&I training and education is required for all employees and leaders.
- A variety of learning methods are used, including classroom, self-study, experiential, eLearning, assessment, videos, and case studies.
- Programs focused on specific dimensions of diversity such as disability, gender and gender identity, sexual orientation, social class, generations, culture, and ethnicity are offered and sometimes required.
- Employees and their families receive cultural competency training and other support when relocating internationally.

50%

- In addition to specific courses on D&I topics, D&I is integrated into the organization's training and education, including employee orientation, customer service and management training.
- Programs address difficult and sometimes sensitive or uncomfortable issues of stereotypes, bias, and "isms," and include development of skills to address those issues.
- D&I experts or training professionals design and/or conduct the D&I training; employees may be trained to help conduct some sessions.
- Instructor guides or tool kits are provided to supervisors and managers with the expectation that they conduct training and education as part of their responsibilities.
- The organization encourages cultural celebrations and organization-wide activities that combine social interaction with D&I learning and are attended by a diverse group of employees at all levels.

0%

- There is no formal D&I education or training.
- There is no obvious D&I knowledge, understanding or awareness.

25%

- Training on D&I is brief and focused on educating employees about policies and meeting legal requirements.
- Persons designing and delivering training do not have specific expertise in D&I.
- D&I training and education offered is primarily "off-the-shelf" programs not tailored for local needs and issues.
- A small resource library of diversity-related books, videos, eLearning, and other tools is available.

Category 8: ASSESSMENT, MEASUREMENT, AND RESEARCH

100%

- ❑ In-depth D&I assessments covering behavior, attitude and perception are conducted for the overall organization and within divisions.
- ❑ D&I measures are included as part of the organization's overall scorecard, linked to the organizational strategy and tied to incentive compensation.
- ❑ Many D&I-related research projects are conducted to address specific concerns and challenges, including broad issues like corporate social responsibility, marketability, sustainability, human rights, and labor rights.
- ❑ Employees provide input to all facets of managing the D&I process, from needs assessment to evaluation, using practices such as 360-degree feedback and employee opinion/engagement surveys.
- ❑ Leaders of the organization can articulate the impact and return on investment of all components of its workforce and marketplace D&I initiatives.

75%

- ❑ Integrated, multi-technique approaches to monitoring and evaluating D&I goals are conducted; a D&I return-on-investment study has been conducted for at least one high-impact D&I initiative.
- ❑ Organizational culture is monitored through cultural audits and employee opinion surveys using diversity dimensions to uncover critical risk factors.
- ❑ Research on specific diversity dimensions, issues, interactions, and systems is conducted for both internal and external purposes. The organization invests in research to study D&I.
- ❑ Employees are measured on their performance based on D&I goals set by the organization.
- ❑ The organization regularly reviews D&I benchmarks, both within and across industries/sectors, and implements plans to make progress toward meeting them.

50%

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

0%

- ❑ There are no metrics, systems or practices to gather information about diverse employee or customer needs and concerns.
- ❑ There is no attempt or effort to evaluate or monitor diversity-related issues or D&I progress.

25%

- ❑ Some feedback on D&I is solicited in employee and customer surveys, market research, internal reviews, and climate studies, but there is little follow-up or consequences for lack of performance.
- ❑ Representation of women and other groups, if required by law, is monitored.
- ❑ Measurements are primarily based on past indicators such as turnover, lawsuits, and complaints.

Category 9: D&I COMMUNICATIONS

100%

- D&I topics are quickly located on the organization's internal and external websites. Information is robust and regularly updated.
- The organization's communications on D&I reinforce the organization's values, products and services, customers, reputation, and goals, and are fully accessible to all audiences.
- The organization has branded its D&I initiative, enhancing the organization's reputation.
- Annual reports objectively cover progress on reaching D&I vision and goals.
- D&I communication is frequent, varied, and innovative, which results in an enhanced reputation for the organization. For example, it may include the use of blogs and social networking.
- D&I is incorporated in communication with the workforce, customers, and other audiences.

75%

- The organization's external website prominently includes information about its D&I vision, strategy, goals, and results.
- Alternate forms of communication are in place for employees, customers, applicants, and others who do not have electronic access or who have disabilities.
- The organization realizes the positive role of D&I events and celebrations as teaching tools and works to maximize their impact. Some events are attended by people outside the organization.
- Communications professionals and speechwriters are educated about D&I and include those messages into general organizational communication.
- The organization's communication functions – community affairs, employee communications, public relations, and marketing communications – consistently highlight D&I and share successes in internal and external communications.
- Although employees are expected to access information on D&I on the organization's website, information is also sent frequently and systematically to employees, and is presented prominently.

50%

- The organization sponsors a forum for employees to discuss diversity issues and provide input to the organization.
- Through a variety of methods such as a website, newsletter, emails, and events, employees learn about the D&I vision, strategy, and goals.
- Most D&I events include some emphasis beyond cultural cuisine and celebrations.
- The organization integrates D&I into many aspects of organizational communications.
- Translations are provided when needed.
- Communication reflects an understanding and appreciation of gender differences, cultural nuances, and so forth.

0%

- There is no formal communication about D&I.
- Discussions on D&I are seen as risky and are avoided.

25%

- Some leaders talk about D&I informally.
- Someone in human resources or management occasionally reminds employees about policies and compliance requirements.
- Communication is done by a council, task force, or network and covers general awareness and cultural events.

Category 10:

COMMUNITY, GOVERNMENT RELATIONS, AND
CORPORATE SOCIAL RESPONSIBILITY

100%

- Financial resources as well as employee time and labor are provided for a variety of community projects; employees may be compensated for the time they volunteer for community involvement.
- Facilities are located to serve and promote economic growth of the whole community, particularly communities that have been historically ignored, or 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 and in promoting the advancement of D&I in the community.
- Corporate social responsibility is treated as more than philanthropy. It is perceived as a core function and is mainstreamed into organizational strategy.
- The organization provides thought-leadership on D&I and shares its success in publications and presentations.
- In connecting diversity with human rights, the organization speaks out on the issue and ensures that all its stakeholders support human rights.
- The organization supports conventions such as the Universal Declaration of Human Rights and the Global Compact, and reflects this in both heart and in action.

75%

- The organization thinks systemically, analyzing its social responsibility and investment policies (if for-profit) to consolidate initiatives.
- Community involvement reflects long-range planning and supports all segments of the population. It solicits input and involvement from diversity networks and from a wide range of its own diverse employees.
- The organization supports scholarship and internship programs that have a positive impact on both the community and the organization's future labor force.
- The organization encourages the contribution of volunteered employee time and ideas to the community, may provide funds to organizations where employees are involved, and benefits from the D&I learning employees gain.
- The organization connects D&I with ethics and integrity initiatives, supports social justice and strives for inclusive growth, social cohesion, environmental sustainability, and economic development.

50%

- An effort is made to involve the organization with a variety of groups that support the community.
- 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.
- Local, community heroes are celebrated by the organization.

0%

- There is limited or no involvement or support provided to communities in which the organization works.
- The organization feels threatened by any government intervention to engage in D&I.

25%

- There is some involvement in societal issues generally considered non-controversial. The organization is motivated primarily by public relations objectives and/or tax reduction.
- There is some involvement with the community, schools, and/or local government projects.

Category 11: PRODUCTS AND SERVICES DEVELOPMENT

100%

- ❑ The product-development cycle recognizes diversity from the outset. It doesn't merely "translate" or "adapt" products and services first developed for the dominant culture. In addition, the organization does not develop products that are based on stereotypes.
- ❑ Almost all teams involved in the ongoing development of products and services are diverse and include customers, non-customers, and community representatives.
- ❑ The organization shows the link between diversity and innovation, consistently leveraging D&I to increase product and service innovation.
- ❑ Culturally-sensitive services, such as engaging a traditional healer in a hospital, are provided even though that practice may not be accepted by the dominant culture.
- ❑ Universal design is integrated throughout the product development cycle.
- ❑ The organization sees a strong connection between D&I and product sustainability, and supports bio-diversity initiatives.

75%

- ❑ Changes in demographics, values, and consumer behaviors are anticipated and served.
- ❑ Product adaptations for people from various groups are made (e.g., shariah-compliant financial products, products for left-handed users, adaptations for people with disabilities, and so forth).
- ❑ The organization is sensitive to the religious views, values, and cultural norms of various countries and communities and develops products and services considered appropriate for those customers.
- ❑ The organization leverages diverse teams knowing that it will greatly improve the quality and innovation of products and services.
- ❑ Employee networks are involved in product and services development.

50%

- ❑ 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.

0%

- ❑ No effort is made to assess if differences should be designed into products and services for current and potential customers.
- ❑ Focus groups do not include a diverse population of employees or potential customers.

25%

- ❑ Research and product testing help analyze how different customer groups and cultures may use the organization's products and services.
- ❑ There is some conversation about altering products and services based on customer demographics.

Category 12:

MARKETING, SALES, DISTRIBUTION, AND CUSTOMER SERVICE

100%

- The organization uses sophisticated market analyses techniques on an ongoing basis to understand its diverse customer base.
- The organization is keenly aware of the needs, motivations, and perspectives of diverse customer groups and successfully adapts marketing, sales, and distribution strategies to meet these needs.
- It is expected that the diversity and heterogeneity of customers will likely increase over time, and the ability to successfully serve these differences is continuously reviewed and improvements made.
- To most effectively speak to target audiences, the organization uses a systemic, universal marketing and customer service approach that can be adapted within and across countries, regions, cultures, language and other diversity dimensions.

75%

- Sales and customer service training reflects D&I by providing guidelines to respectfully address specific customer needs, interests, and comfort levels.
- Diverse groups of customers and potential customers are surveyed on needs and satisfaction. The results shape marketing, sales, distribution, and customer service strategies.
- While outside D&I expertise may be sought, the organization leverages the marketing, sales, distribution, and customer service expertise of its diverse staff.
- Marketing, advertising, public relations, and all customer contact methods do not perpetuate stereotypes.
- Most marketing and customer service staff members have expertise in all dimensions and aspects of D&I, including linguistic diversity and reducing unconscious bias.

50%

- Some attempt is made 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 regularly provide advice.
- Marketing, advertising, and public relations reflect diversity and are positioned to reach diverse markets.

0%

- The organization assumes its market is homogeneous.
- Advertising and publicity may perpetuate stereotypes and traditional roles.
- Customer service, distribution, and sales ignore differences in customer needs and country or regional infrastructure.

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 translated literally rather than being culturally adapted.

Category 13: SUPPLIER DIVERSITY

100%

- ❑ The organization's suppliers are required to have a significant percentage of their business with diverse suppliers and to provide evidence that they are committed to achieving their own D&I goals.
- ❑ Suppliers reflect the community's composition along a broad range of diversity dimensions.
- ❑ The organization collaborates with its underrepresented suppliers to improve the supply chain and all aspects of supply management.
- ❑ The organization acknowledges and promotes the benefits of excellent supplier relations in meeting both its business and community/social goals.
- ❑ The Supplier Diversity function is fully aligned with the D&I function, marketing, and all other related functions.
- ❑ The organization procures both small and non-critical supplies as well as goods and services that are core to the business from underrepresented suppliers.

75%

- ❑ The organization is proactive in attracting underrepresented suppliers and in informing new and established suppliers of additional opportunities with the organization.
- ❑ Underrepresented suppliers are sometimes given additional points in the bidding process.
- ❑ The organization treats its suppliers with respect and dignity including simplifying the process of doing business and paying supplier invoices as soon as possible.
- ❑ Persons involved in the supplier selection process are knowledgeable about D&I and aware of the potential impact of hidden bias as they select and work with suppliers.
- ❑ Educational assistance and coaching is provided to underrepresented suppliers and potential suppliers to help them be more competitive.
- ❑ The organization participates in supplier diversity councils and/or organizations.

50%

- ❑ A supplier database includes information about the ownership of organizations that supply goods or services and how diverse its employees are.
- ❑ Supplier diversity has become important to the organization and the organization has dedicated resources (staffing and funding) to implement the supplier diversity strategy.
- ❑ Input from underrepresented suppliers is included in the organization's supplier diversity program.
- ❑ D&I education specific to supplier relations is provided to all staff who interact with suppliers.
- ❑ The organization regularly participates in trade fairs, special advertising and seeks other opportunities to inform underrepresented suppliers that the organization welcomes their business.
- ❑ Policies and practices promote the use of suppliers who previously may have been excluded.

0%

- ❑ No consideration is given to diversity when determining suppliers.
- ❑ There is no awareness of the value that diverse suppliers bring to the organization.

25%

- ❑ There is some attempt to include a few suppliers outside of traditional sources, but it is done without an underlying strategy to support organizational goals.
- ❑ The organization is beginning to use underrepresented vendors for small or low-fee contracts.
- ❑ There is little collaboration between the procurement function, where relationships with suppliers are usually managed, and the D&I function.

THE AUTHORS

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Julie O'Mara, president of O'Mara and Associates, an organization development consulting firm, serves clients in several sectors and specializes in leadership and managing diversity and inclusion. She is considered a pioneer for her work having been engaged in numerous successful initiatives with major clients. She is active in several diversity organizations and often collaborates with others to advance the field. She also serves on the Board of Directors of Berrertt-Koehler Publishers. A former National President of the American Society for Training and Development, Julie was instrumental in developing professional competencies for the training and development field. She has received several awards for her leadership and diversity work. She is co-author of *Managing Workforce 2000: Gaining the Diversity Advantage*, a bestseller published by Jossey-Bass, and author of *Diversity Activities and Training Designs*, published by Pfeiffer and Company. She serves on the D&I Standards Taskforce for the Society for Human Resource Management. She currently lives in Las Vegas, Nevada, USA.

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Global Diversity and
Inclusion Benchmarks:
Standards for Organizations
Around the World

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