



Creating a Competency Model for Diversity and Inclusion Practitioners

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Creating a Competency Model for Diversity and Inclusion Practitioners

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Executive Summary

Ten years ago, the word “inclusion” was rarely used, and only by a few organizations. Now, the phrase “diversity and inclusion” has its own acronym—D&I. Focus has progressed from valuing differences, which was largely achieved through awareness training and multicultural celebrations, to strategic global business growth. Emphasis today is on cornering new markets, building effective and efficient global teams, and managing brand reputation. Clearly, the 21st century D&I practitioner, embracing this more public, decidedly strategic role, requires a challenging new set of competencies.

There are five primary trends driving changes in the D&I practitioner’s role and that define the need for new thinking regarding competencies. These are:

- Globalization
- Demographic shifts
- Technology
- Legal environment
- Socio-political climate

In order to hire and manage D&I executives, to say nothing of completing succession plans that ensure the function’s long-term viability, a set of globally applicable, measurable competencies for D&I practitioners at multiple levels is needed.

The competency model contained in this report is the result of an intensive, two-day working session of The Conference Board’s Council on Workforce Diversity, with representatives from the Diversity & Inclusion Council and the Diversity Business Council. In preparation for this session, members of all U.S. Diversity Councils were invited to share their perspectives via a brief survey. Seventy-six individual respondents shared their thinking on competencies required of a D&I practitioner today. Forty-four of these, or 58 percent, work for organizations with global operations. (A copy of the survey can be found on page 23.) During the working session, U.S. council members used results from this survey as a springboard, shaping the model through rigorous discussions. Members of the European, Asian, and Canadian Councils and the staff who support them provided feedback and perspective on drafts of the model and this report. The model was then shared with colleagues from across the globe, who provided feedback on its relevance and applicability.

The model includes 1) categories of like competencies, 2) the competencies themselves, and 3) behaviorally-based definitions for each competency. The seven categories and their related competencies are:

1. Change Management
 - Organizational Development
 - Corporate Communication
 - Critical Interventions
2. Diversity, Inclusion, and Global Perspective
 - Cultural Competence
 - Negotiation and Facilitation
 - Continuous Learning
 - Complex Group Dynamics
 - Judgment
 - Subject Matter Expertise

3. Business Acumen

- External Market Knowledge
- Holistic Business Knowledge
- Diversity and Inclusion ROI (Return on Investment)

4. Strategic External Relations

- Corporate Social Responsibility / Government / Regulatory
- Strategic Alliances
- Diverse Markets / Supplier Diversity
- Brand / Reputation Management

5. Integrity

- Ethics
- Resilience
- Influence
- Empathy
- Communication

6. Visionary & Strategic Leadership

- Diversity & Inclusion Future State
- Pragmatism
- Political Savoir-Faire (At HQ and Local Levels)

7. HR Disciplines

- Total Rewards / Talent Management / Organizational Development / Work and Life Balance / Training
- Compliance
- Employee Relations



To be used effectively, these competencies should be integrated into a company's business metrics. Organizations would do best to customize simple, clear measures that are part of an organization's overall metrics for each of the global diversity competencies, or even for each category. While defining these measures is beyond the scope of this report, organizations should be asking the question: how can this person use this competency to strengthen the business? Or, what does this person need to achieve to further our organizational goals?

By attaching simple, business-based metrics to each competency, or even to each competency category, organizations lay the foundation for D&I practitioners to achieve success, thereby best supporting organizational goals.

Diversity and Inclusion Practitioner Competencies

1 Change Management

Organizational Development

- Understands and facilitates the change process through completion
- Gains leadership involvement and line ownership

Corporate Communication:

- Communicates the full spectrum of inclusion
- Utilizes multiple communication vehicles such as web sites, brochures, talking points, and more
- Maintains a balanced global perspective that offers flexibility and variations for use at the local level
- Keeps what is best for the business at the forefront
- Elaborates on benefits of D&I
- Acknowledges and addresses possible unfavorable impact
- Tracks and communicates strategy progress and setbacks
- Acknowledges and addresses challenges / obstacles / opportunities

Critical Interventions

- Offers useful and timely interventions in cases where progress is impeded due to a diversity-related issue

2 Diversity, Inclusion, and Global Perspective

Cultural Competence

- Understands multiple cultural frameworks, values, and norms
- Demonstrates an ability to flex style when faced with myriad dimensions of culture in order to be effective across cultural contexts
- Understands the dynamics of cross-cultural and inclusion-related conflicts, tensions, misunderstandings, or opportunities
- Understands the history, context, geography, religions, and languages of the regions in which the organization does business
- Is fluent in more than one, and ideally several, languages

Negotiation and Facilitation

- Negotiates and facilitates through cultural differences, conflicts, tensions, or misunderstandings

Continuous Learning

- Recognizes and addresses one's filters, privileges, biases, and cultural preferences
- Commits to continuous learning / improvement in diversity, inclusion, and cultural competence
- Seeks and utilizes feedback from diverse sources

Complex Group Dynamics

- Understands and effectively manages complex group dynamics and ambiguity

Judgment

- Is able to discern when to inquire, advocate, drive, or resolve more decisively

Subject Matter Expertise

- Knows and applies best practices in diversity and inclusion practices, strategies, systems, policies, etc.
- Understands subtle and complex diversity and inclusion issues as they relate specifically to marginalized groups (while these vary by region, they often include women, people with disabilities, older people, and racial, ethnic or religious minorities)
- Establishes and manages D&I councils effectively
- Collaborates with other functional teams
- Is a role model for inclusive and culturally competent behavior

3 Business Acumen

External Market Knowledge

- Understands and is current on global and local trends/ changes and how they inform and influence D&I
- Gathers and uses competitive intelligence
- Understands diverse customer/client needs
- Understands and is current with global socio-political environments
- Understands context and lessons learned

Holistic Business Knowledge

- Understands the impact of the financial, economic, and market drivers on bottom line results
- Understands core business strategies
- Possesses solid financial acumen
- Uses information from multiple disciplines and sources to offer integrated ideas and solutions on issues important to the organization

Diversity and Inclusion ROI (Return on Investment)

- Determines and communicates how D&I contributes to core business strategy and results
- Creates insights on how D&I contributes both to people and HR strategies as well as business results
- Designs and develops D&I metrics that exhibit the ROI impact

4 Strategic External Relations

Corporate Social Responsibility/ Government/Regulatory

- Well-informed about external pressure points (e.g., society, work councils, environment, regulatory, government, customers, and related trends)
- Effectively anticipates and manages stakeholder (e.g., advocacy, community, non-government organizations)
- Recognizes and addresses human rights issues through policy and practice
- Influences media and marketplace via communication and community outreach to competitively position the organization

Strategic Alliances

- Identifies, partners, and leverages relationships with key external organizations / leaders to enhance business results

Diverse Markets/ Supplier Diversity

- Identifies, partners, and leverages relationships with key external diverse suppliers, organizations, and customers to:
 - Enhance the supply chain
 - Increase market share, revenues, and loyalty

Brand/Reputation Management

- Positively influences media and marketplace
- Forges strategic partnerships with internal constituencies through community outreach
- Supports communities in which the organization operates

5 Integrity

Ethics

- Acts ethically and with integrity
- Behaves in a way that leads others to trust him/her
- Speaks with candor and tact
- Acts as a voice for perspectives, levels, and cultures that are not otherwise represented

Resilience

- Pursues goals with drive and energy; seldom gives up before finishing, especially in the face of resistance
- Maintains positive and constructive outlook

Influence

- Negotiates and persuades effectively at all levels of the organization
- Navigates corporate landscape and has an impact up, down, and sideways
- Listens and adapts approach to fit audience
- Manages and mediates conflict effectively

Empathy

- Understands the point of view and emotions of others, in the context of their cultures, including both minority and majority groups
- Acknowledges, in a stated or unstated fashion, other's perspectives Understands how to motivate and work with both minority and majority groups

Communication

- Knows where resources are, and how to access them
- Communicates effectively
- Engages audience

6 Visionary & Strategic Leadership

Diversity & Inclusion Future State

- Collaborates appropriately with others to envision and convey an inspiring, compelling, and relevant D&I future state
- Actively seeks new ideas, experiences, and thought leaders.
- Is a catalyst for change. Translates / makes connections between new ideas and applications
- Frames new directions in understandable, innovative, and inspiring terms

Pragmatism

- Differentiates between strategy and tactics
- Drives alignment with clients, partners, and stakeholders
- Is pragmatic regarding working within business realities
- Proactively creates foundation for influence at all levels of the organization

Political Savoir-Faire

- Facilitates and manages complex and sensitive matters
- Knows to whom and where to go to get things done (including working with the Board, CEO, and top leaders)
- Collaborates with other functional areas to maximize outcomes for all (especially HR, Organizational development, Leadership development)
- Possesses the ability to influence and execute beyond positional power.
- Is seen, at all levels, as a trusted source for advice and counsel

7 HR Competencies

Total Rewards/Talent Management/Organizational Development/Work and Life Balance/Training

- Understands the basic tenets and workings of compensation and benefits programs, policies, and best practices
- Provides program options that ensure equitable treatment and mitigate disparities
- Possesses knowledge of programs, policies and best practices that ensure equity and achievement of organizational D&I objectives in a variety of HR areas, including but not limited to recruiting and staffing, OD, work and life balance, succession planning, training / development, and performance management

Compliance

- Understands applicable laws, regulations, and government requirements and their impact on the business
- Ensures compliance through effective programs, policies, and practices

Employee Relations

- Works with others appropriate to the situation to resolve individual and group conflict, including the development and delivery of successful interventions
- Sustains and improves the work environment in the face of change and environmental challenges

The Need for a New Set of Competencies

The role of diversity and inclusion in business is changing due to rapid technological advancements, globalization, immigration, increased demand for skills and education, and an aging workforce in a large part of the world. From being compliance-driven and tactical at its inception, diversity has grown into a business-driven, strategic function.

No longer a fledgling discipline, the D&I function is now a recognized and accepted component of organizational structure in many large corporations. An HR Magazine article reports, “More organizations are dedicating senior-level executives to drive their diversity initiatives for bottom-line effect.”¹

Yet, many lament the lack of cohesion and clarity regarding what, exactly, a D&I practitioner does. “Though many businesses know that they want someone in charge of diversity efforts, they’re not necessarily sure what they want her [or him] to actually do,” asserts Vadian Liberman in an article in *The Conference Board Review*.² He points out that it is this very vagueness that causes companies to place lesser value on their D&I directors. After all, it is difficult to respect someone when his/her achievements and expectations are unclear. “Without a clear job profile, many companies become disillusioned with those they hire to manage diversity,” and, Liberman stresses, companies frequently confuse those in diversity leader roles with the initiative itself. Thus, the whole discipline is affected when a D&I leader fails in the role.

The Conference Board Council on Workforce Diversity echoes these concerns. To successfully hire and manage diversity and inclusion executives, to say nothing of completing succession plans that ensure the function’s long term viability, a set of globally applicable, measurable competencies for D&I practitioners, that can be customized for those at multiple levels, is needed.

Five key trends are driving changes in the diversity and inclusion professional’s role, thus defining a need for new thinking regarding competencies.

Globalization

An August 2007 survey by the Human Resources Planning Society reports accelerating globalization as the most significant trend having an impact on human resources today.³ As employees and managers are asked to work with team members, business partners, and customers from around the world, a global perspective and cultural competencies have become imperatives, and D&I leaders are often responsible for driving these skills. Similarly, immigration has changed the face of many workforces around the world. This, too, calls for increased cultural competence, as well as making the success of D&I strategies more urgent than ever.

Demographic Shifts

In developing parts of the world, soaring economic growth rates coupled with limited numbers of skilled workers have caused high levels of turnover. In other parts of the world (such as the European Union, Canada, and the United States) the labor pool is aging, causing demands for increased flexibility and redefining employee needs and expectations. These concurrent trends require organizations to rethink traditional methods of recruiting and retaining workers, and require D&I leaders to be at the forefront of workforce strategies that exhibit cultural competence, flexibility, and business acumen.

¹ Robert Rodriguez. “Diversity Finds its Place”. *HR Magazine* (August, 2006): 56

² Vadian Liberman. “Do Companies Truly Value Their Diversity Directors?” *The Conference Board Review* (September/October 2006): 18.

³ “What’s Affecting HR Operations?” *HR Focus* (August, 2007)

Technology

Technology has increased accessibility to information and transparency on the part of organizations. It has also made global communication simpler and faster than ever. At the same time, some worry that technology could de-personalize industry, if not used judiciously. Rapid advances in technology translate into freer availability of information. This provides rich opportunities for diversity and inclusion functions to provide employees and managers with access to communication, education, and resources. It also increases employee expectations regarding flexibility, the openness of the culture, and availability of information.

Socio-Political Climate

In the midst of rapid globalization, strong religious, political, and nationalist divides are emerging in communities around the world. Managing these sensitive conflicts and building a culture of inclusion within an organization despite these types of divides is, to say the least, a major challenge for D&I practitioners everywhere.

Legal Environment / Regulation

Increased regulation and media attention have added new dimensions to organizations' compliance requirements. More than ever, companies need to be just as concerned about the damage legal problems will do to their reputation, brand image, community relationships, and stock price as they are about legal fees and financial awards. The 2007 Human Resource Competency Study points to the U.S. Sarbanes-Oxley Act (a law that, in short, regulates financial reporting and accounting controls at all levels of organizations), privacy laws in the European Union, and other regulatory pressures as a reason for "CEOs relying more on HR to manage culture."⁴ Organizations in the EU are faced with the challenge of keeping up with rapidly changing anti-discrimination directives, local laws, and regulations in their own and neighboring countries such as the equal opportunity regulations recently enacted.

⁴ Robert Grossman. "New Competencies for HR" *HR Magazine* (June 2007): 60

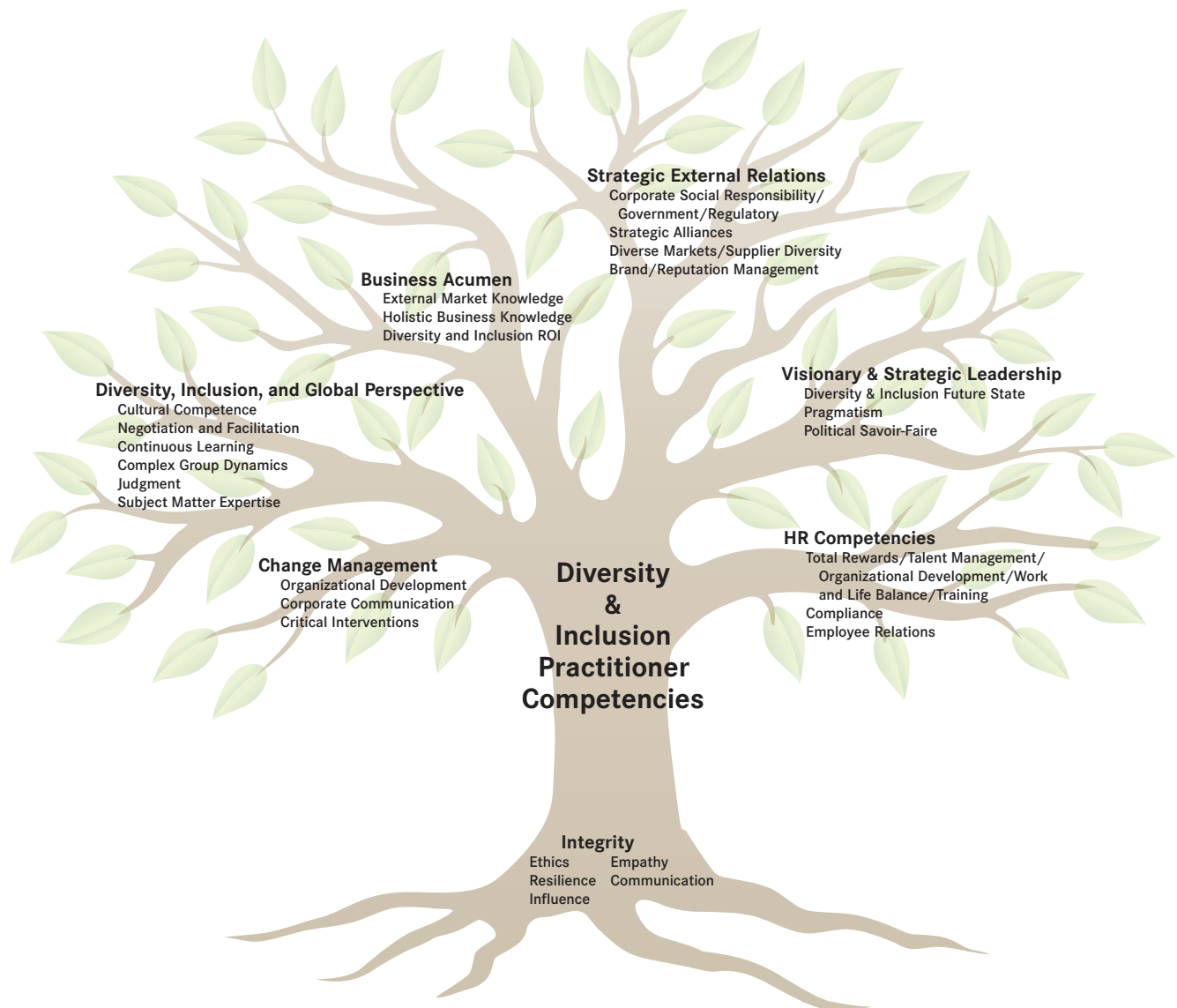
Global Diversity and Inclusion Competency Model

Designed to be Measurable and for Global Application

In this report, we define competencies as knowledge, skills, abilities, behaviors, and attributes to fulfill a certain role. People who are successful most frequently exhibit these competencies.

We set out to devise a competency model that would be applicable to D&I practitioners around the world. To this end, we shared the model with members of The Conference Board Diversity Councils and invited feedback from peers around the world. It is our expectation that, in some parts of the world, competencies may remain consistent, yet the definitions may require some alterations. In other cases, organizations may wish to enhance or customize the model so that it is specific to a region or sub-region.

To ensure that competencies are measurable, we created a behaviorally based definition for each one. Individual organizations can link these behaviors to measures appropriate within their own business contexts.



1 Change Management

D&I is, in its essence, a culture change and growth strategy. Given the rapidly shifting business realities discussed in this report, D&I strategies are routinely challenged to nimbly change course to reach business objectives. Therefore, change management is a critical success factor for every D&I practitioner.

The D&I practitioner must be able to shepherd the organizational change process through facilitation, clear communications, and appropriate, effective interventions when things go off-course.

Change Management	
Competency	Definition
Organization Development	Understands and facilitates the change process through completion Gains leadership involvement and line ownership
Corporate Communication	Communicates the full spectrum of inclusion: Utilizes multiple communication vehicles such as web sites, brochures, talking points, and more Maintains a balanced global perspective that offers flexibility and variations for use at the local level Keeps what is best for the business at the forefront Elaborates on benefits of D&I Acknowledges and addresses possible unfavorable impact Tracks and communicates strategy progress and setbacks Acknowledges and addresses challenges / obstacles / opportunities
Critical Interventions	Offers useful and timely interventions in cases where progress is impeded due to a diversity-related issue

2 Diversity, Inclusion, and Global Perspective

Globalism has perhaps done more to increase organizations' need for the D&I practitioner's expertise than any other single trend. New markets require advanced insights and skills in order to navigate effectively across unfamiliar and varied cultural terrains. More than ever, companies are seeking the expertise of D&I practitioners to instill knowledge and skills to enter new markets, build relationships, and develop credibility across cultural contexts. This is not a stand-alone competency, but influences every other competency in this model. D&I practitioners must, in effect, be cultural interpreters, global marketers and, when needed, mediators. They must recognize and understand cultural norms as they impact modes of marketing, working, and communicating. They must understand subtle dynamics of cultural tensions or conflicts, and be able to negotiate and facilitate others through these challenges.

D&I practitioners are role models. They must be sure that their behaviors demonstrate inclusion and cultural competence, and that their own teams represent a broad range of diversity.

Of course, human beings are a complex species, and no one person will ever have complete mastery of all of the myriad dimensions of diversity, inclusion, and cultural competence. This is why a commitment to continuous learning is critical. Continuous learning requires intellectual energy and curiosity, as well as humility and courage. In order to be open to learning, we must be humble enough to admit that we do not have all of the answers. And we must be courageous enough to experience the discomfort that comes with applying new skills.

An essential part of expertise in diversity is the ability to manage complex group dynamics. We also must be aware of when it is appropriate to inquire, when we need to advocate, or when an issue requires more decisive, or even unilateral, resolution.

Finally, D&I practitioners must be conversant on best practices and emerging trends within the industry, and able to customize and apply these to their own organizations in a way that enhances business outcomes.

Diversity, Inclusion, and Global Perspective

Competency

Definition

Cultural Competence

Understands multiple cultural frameworks, values, and norms

Demonstrates an ability to flex style when faced with myriad dimensions of culture in order to be effective across cultural contexts

Understands the dynamics of cross-cultural and inclusion-related conflicts, tensions, misunderstandings, or opportunities

Understands the history, context, geography, religions, and languages of the regions in which the organization does business

Is fluent in more than one, and ideally several, languages

Negotiation and Facilitation

Negotiates and facilitates through cultural differences, conflicts, tensions, or misunderstandings

Continuous Learning

Recognizes and addresses one's filters, privileges, biases, and cultural preferences

Commits to continuous learning / improvement in diversity, inclusion, and cultural competence

Seeks and utilizes feedback from diverse sources

Complex Group Dynamics

Understands and effectively manages group dynamics and ambiguity

Judgment

Is able to discern when to inquire, advocate, drive, or resolve more decisively

Subject Matter Expertise

Knows and applies best practices in diversity and inclusion practices, strategies, systems, policies, etc.

Understands subtle and complex diversity and inclusion issues as they relate specifically to marginalized groups (while these vary by region, they often include women, people with disabilities, older people, and racial, ethnic or religious minorities)

Establishes and manages D&I councils effectively

Collaborates with other functional teams

Is a role model for inclusive and culturally competent behavior

3 Business Acumen

Business acumen has three areas of focus: external market, holistic business, and D&I ROI.

An effective D&I practitioner is required to be a full business partner. As such, practitioners must be conversant with global and local trends in their industries. They must gather and use competitive intelligence in the same manner as any other businessperson. Critically, they must also understand diverse customers, be current in global sociopolitical environments in which the organization does business, and be mindful of the business context and lessons learned.

The D&I practitioner should also be fully conversant with the impact of financial drivers on bottom line results

and understand her/his organization’s core business strategies. This knowledge, coupled with solid financial acumen, positions the D&I practitioner to lead the organization as a key strategic player.

Making the business case for diversity falls under business acumen as well. Through a thorough understanding of the market and the business, the practitioner is better positioned to create insights on how D&I will contribute to business results, as well as to People and HR strategies. By clearly expressing the bottom line implications of D&I, the practitioner underscores the merits of D&I work as part of the organization’s business strategy.

Business Acumen	
Competency	Definition
External Market Knowledge	<p>Understands and is current on global and local trends/ changes and how they inform and influence D&I</p> <p>Gathers and uses competitive intelligence</p> <p>Understands diverse customer/client needs</p> <p>Understands and is current with global socio-political environments</p> <p>Understands context and lessons learned</p>
Holistic Business Knowledge*	<p>Understands the impact of the financial, economic, and market drivers on bottom line results*</p> <p>Understands core business strategies</p> <p>Possesses solid financial acumen</p> <p>Uses information from multiple disciplines and sources to offer integrated ideas and solutions on issues important to the organization</p>
Diversity and Inclusion ROI	<p>Determines and communicates how D&I contributes to core business strategy and results</p> <p>Creates insights on how D&I contributes both to people and HR strategies as well as business results.</p> <p>Designs and develops D&I metrics that exhibit the ROI impact.</p>
* Adapted from The Campbell Soup Company’s Compass Model	

4 Strategic External Relations

Increasingly, the D&I practitioner is responsible for contributing to external relationships. From tapping emerging markets to managing positive media and community relations, D&I practitioners are no longer solely focused on internal employee issues. Today’s D&I practitioner is involved in organizations’ philanthropic efforts, responsible for supplier diversity, contributes her/his expertise to marketing campaigns, and is a key player in the creation and enhancement of organizations’ brands and reputations. The competencies falling under the rubric of strategic external relations address these expectations in four key areas:

- corporate social responsibility (along with government relations and regulatory requirements);
- strategic alliances with external community organizations;
- managing supplier diversity to enhance the supply chain and increase market share, revenue, and loyalty; and
- brand/reputation management through media and community relationships.

Strategic External Relations	
Competency	Definition
Corporate Social Responsibility / Government / Regulatory*	<p>Well-informed about external pressure points (e.g., society, work councils, environment, regulatory, government, customers, and related trends)</p> <p>Effectively anticipates and manages stakeholders (e.g., advocacy, community, non-government organizations)</p> <p>Recognizes and addresses human rights issues through policy and practice</p> <p>Influences media and marketplace via communication and community outreach to competitively position the organization</p>
Strategic Alliances	Identifies, partners, and leverages relationships with key external organizations / leaders to enhance business results
Diverse Markets / Supplier Diversity	<p>Identifies, partners, and leverages relationships with key external diverse suppliers, organizations, and customers to:</p> <ul style="list-style-type: none"> Enhance the supply chain Increase market share, revenues, and loyalty
Brand / Reputation Management	<p>Positively influences media and marketplace</p> <p>Forges strategic partnerships with internal constituencies through community outreach</p> <p>Supports communities in which the organization operates</p>
* Adapted from The Conference Board Diversity Executive	

5 Integrity

If you ask any CEO of a company with a successful D&I strategy, she/he will agree that it takes a special kind of person to succeed as a D&I practitioner. The D&I practitioner must be ethical, resilient, influential, empathic, and a skilled communicator. These are the characteristics, council members suggest, that have enabled them to have

the strength and fortitude to succeed in an exceptionally complex field. They have used these skills to gain credibility and stature, build relationships, and garner support during times when diversity and inclusion were misunderstood or undervalued.

Integrity	
Competency	Definition
Ethics	<p>Acts ethically and with integrity</p> <p>Behaves in a way that leads others to trust him/her*</p> <p>Speaks with candor and tact</p> <p>Acts as a voice for perspectives, levels, and cultures that are not otherwise represented</p>
Resilience	<p>Pursues goals with drive and energy; seldom gives up before finishing, especially in the face of resistance</p> <p>Maintains positive and constructive outlook**</p>
Influence	<p>Negotiates and persuades effectively at all levels of the organization</p> <p>Navigates corporate landscape and has an impact up, down, and sideways</p> <p>Listens and adapts approach to fit audience</p> <p>Manages and mediates conflict effectively</p>
Empathy	<p>Understands the point of view and emotions of others, in the context of their cultures, including both minority and majority groups</p> <p>Acknowledges, in a stated or unstated fashion, other’s perspectives***</p>
Communication	<p>Understands how to motivate and work with both minority and majority groups</p> <p>Knows where resources are, and how to access them</p> <p>Communicates effectively</p> <p>Engages audience</p>
	<p>* Adapted from the Merrill Lynch Leadership Model</p> <p>** IBID</p> <p>*** Schwartz, W.,(2002) “From passivity to competence: A conceptualization of knowledge, skill, tolerance, and empathy”. <i>Psychiatry</i> 65(4) pp. 338-345.</p>

6 Visionary & Strategic Leadership

Successful D&I practitioners are not only strategic leaders, but also visionaries. They envision D&I success for the organization, and convey it in a manner that rouses the enthusiasm of others. They are imaginative and innovative, and yet not altogether dreamers. Practitioners

understand the business realities of the organization, and ground their visions of the future state in pragmatic strategies. A skilled organizational politician, the D&I practitioner has the power to get things done through relationships and influence.

Visionary & Strategic Leadership	
Competency	Definition
Diversity & Inclusion Future State	<p>Collaborates appropriately with others to envision and convey an inspiring, compelling, and relevant D&I future state</p> <p>Actively seeks new ideas, experiences, and thought leaders</p> <p>Is a catalyst for change. Translates / makes connections between new ideas and applications</p> <p>Frames new directions in understandable, innovative, and inspiring terms</p>
Pragmatism	<p>Differentiates between strategy and tactics</p> <p>Drives alignment with clients, partners, and stakeholders</p> <p>Is pragmatic regarding working within business realities</p> <p>Proactively creates foundation for influence at all levels of the organization</p>
Political Savoir-Faire	<p>Facilitates and manages complex and sensitive matters*</p> <p>Knows to whom and where to go to get things done (including working with the Board, CEO, and top leaders)</p> <p>Collaborates with other functional areas to maximize outcomes for all (especially HR, Organization development, Leadership development)</p> <p>Possesses the ability to influence and execute beyond positional power</p> <p>Is seen, at all levels, as a trusted source for advice and counsel</p>
	<p>* Adapted from The Campbell Soup Company's Compass Model</p>

7 HR Competencies

Understanding the various HR disciplines and their inter-relationship with D&I, the D&I practitioner acts as an expert resource to HR colleagues. Not only does she/he offer insights into legal compliance issues, but she/he

identifies opportunities for total rewards, talent management, OD, work and life balance, training, and employee relations to align their work with the D&I strategy, each furthering the other’s objectives.

HR Competencies	
Competency	Definition
Total Rewards/ Talent Management/ Organizational Development/Work and Life Balance/Training	<p>Understands the basic tenets and workings of compensation and benefits programs, policies, and best practices</p> <p>Provides program options that ensure equitable treatment and mitigate disparities</p> <p>Possesses knowledge of programs, policies and best practices that ensure equity and achievement of organizational D&I objectives in a variety of HR areas, including but not limited to recruiting and staffing, OD, work and life balance, succession planning, training/development, and performance management</p>
Compliance	<p>Understands applicable laws, regulations, and government requirements and their impact on the business</p> <p>Ensures compliance through effective programs, policies, and practices</p>
Employee Relations	<p>Works with others appropriate to the situation to resolve individual and group conflict, including the development and delivery of successful interventions</p> <p>Sustains and improves the work environment in the face of change and environmental challenges</p>

Proficiency Levels

This competency model covers a broad range and depth of skills. In truth, rarely will you find a D&I practitioner (or any other professional) who demonstrates mastery of the entire set of competencies. Business needs, organizational size and reach, complexity of the D&I strategy, and the D&I practitioner’s level of responsibility within the organization will dictate the specific level of proficiency needed for each competency.

Higher-level practitioners—such as Chief Diversity Officers, General Managers, Directors, Senior Vice Presidents, and Vice Presidents—should have mastery

of most of the competencies. For those competencies that D&I functional leaders have not personally mastered, they should have the ability to identify, recruit, and lead others (be they outside consultants or internal team members) with the requisite skills. Thus, while it may be that no one individual possesses mastery of all of the competencies, the D&I team as a whole does.

Among the ranks of D&I managers, specialists, and other professionals, we may see proficiency in many competencies, mastery of others, and developmental focus on yet others. Administrators, coordinators, and other support staff will no doubt also demonstrate mastery in some areas, and varying levels of proficiency and developmental focus in others. The key is for each organization to determine what level of proficiency is needed for each practitioner to achieve her/his goals. Metrics can be determined accordingly.

Top Factors to Achieve Global Success

Below is a summary of survey responses on the top factors, professional and/or personal, that diversity professionals specifically need in order to achieve global success (numbers denote how often this response was listed):

Global business understanding	15	Reliance on inquiry versus advocacy	2
Cultural competence	15	Ability to design and implement training initiatives	2
Global view/knowledge	12	Diversity best practices	2
Interpersonal/communication skills	11	Forward thinking	2
International experience	9	Resources	2
Open mindedness/listening skills	7	Support from the top	2
Ability to influence	6	Prior HR experience	1
Flexibility	6	Ability to work in different layers in the organization	1
Patience and perseverance	6	Inclusiveness	1
Change management	5	Credibility	1
Strategic thinking	5	Talent	1
Business acumen	4	Self-awareness	1
Management skills	4		
Local country knowledge	4		
Passion for D&I	3		

Are Some Competencies More Important Than Others?

Survey respondents were asked to list the top three factors, professional and/or personal, they feel have contributed most to their success as a diversity professional. Their answers (numbers denote how often this response was listed):

Partnerships/relationship building skills	23	Global mindset / experience	4
Business knowledge / understand the business	19	HR background / knowledge	2
Communication skills	11	Listening skills	2
Business acumen	9	Manage multiple competing priorities	1
Passion / commitment to D&I	9	Able to communicate the business case	1
Strategic thinking	8	External relationships	1
Subject matter expertise	6	Great mentor	1
Influencing skills	5	Analytic skills	1
Leadership skills	4	Be a role model for the corporation	1
Project management and execution	4	Inclusiveness	1
Change management skills	4		

How Does This Model Compare To Other Competency Models?

The University of Michigan's School of Business has published five Human Resources Competencies Studies (HRCS) in the last 20 years⁵. The most recent study, released in 2007, compiles the results of research on over 10,000 respondents worldwide, and provides an HR Competency Model that, in several ways, is complementary to the Diversity Competency Model presented in this report.

The HRCS model identifies six key competencies. The Credible Activist competency describes an HR professional who is both credible and active in terms of taking stands on issues. This is similar to The Conference Board's Integrity competencies, particularly Ethics and Influence. Business Ally stresses the importance of HR people understanding and contributing to how the organization makes money, and is directly related to our Business Acumen category. Operational Executor refers to the operational aspects of managing people and organizations, and echoes our HR Competencies. HRCS'

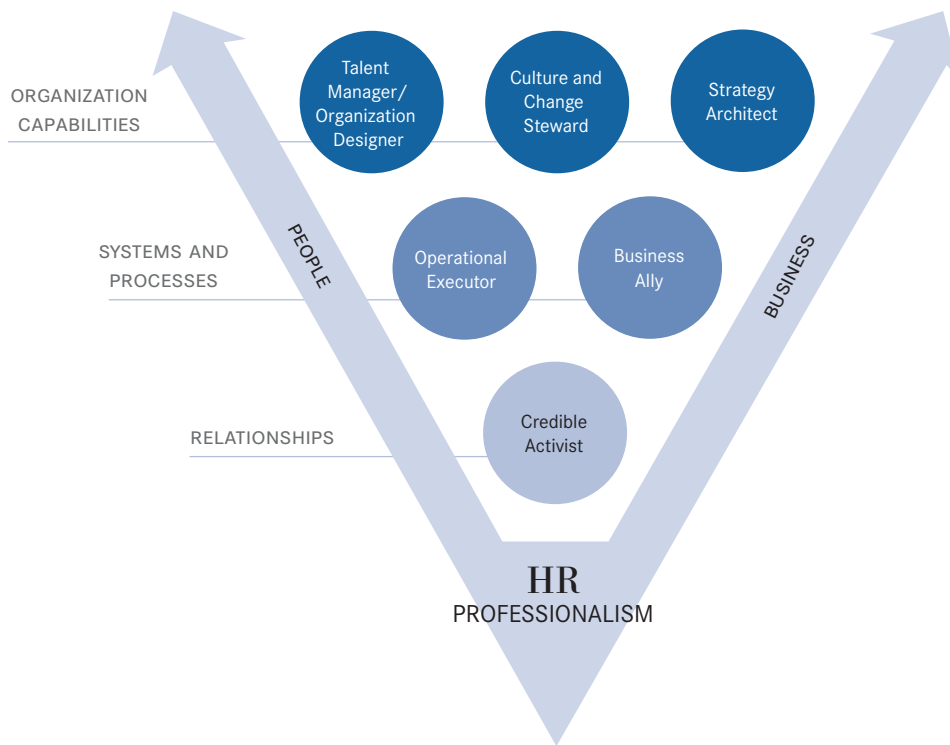
⁵ Dave Ulrich, Wayne Brockbank, Dani Johnson, and Jon Younger. "Human Resource Competencies, Responding to Increased Expectations" not yet published

Culture Change Steward refers to the HR Professional’s responsibility in shaping organizational culture. It can be seen as similar to The Conference Board’s Change Management category. Strategy Architect refers to vision and strategy for long-term success, and is aligned with our own Strategic and Visionary Leadership.

Of course, The Conference Board model, being tailored to the D&I practitioner, contains several categories that are distinct from the HRCS model, such as our emphases on Diversity, Inclusion, and Global Perspective, and Strategic External Relations.

In 2001, The Conference Board published a report entitled, “The Diversity Executive”, which outlined seven competencies. Five of those seven are reflected in our current model, such as Business Acumen, Strong and Visionary Leadership, Large Systems Change Skills, the Ability to Influence, and Commitment to D&I. Despite this, the focus has shifted due to changing business conditions, causing the current model to take on a flavor and texture that is all its own.

The University of Michigan’s School of Business: **Human Resource Competency Model**



Metrics

Most management experts agree that competency models are only as useful as their metrics. Despite this, many top-notch organizations fail to attach metrics to competencies at all, while other organizations create complex systems of measurement that can quickly become unwieldy, and are often inaccurate. Duncan Jackson, who teaches in the Department of Management and International Business at Massey University Albany (New Zealand), points out “...different measures are often added together to create an overall measure of a competency.” And that, “piecing together aspects of different measures in this way most often fail—and fail miserably.”⁶

We are therefore recommending that organizations design simple, clear measures for global diversity competencies. Ask the question: how can this person use this competency to strengthen the business? Or, what does this person need to achieve to further our organizational goals?

For example, consider cultural competence. How will the D&I practitioner’s ability to negotiate and facilitate through cultural conflicts, opportunities, tensions, or misunderstandings bring the business closer to its goals? Perhaps he/she can help a Belgium-based purchasing team learn to more effectively manage a contract with a Chinese supplier, resulting in better quality and faster turnaround. Or perhaps she/he can coach a West African executive on his/her communications with Asian executives, supporting him/her in becoming a stronger leader and developing credibility in a different part of the world.

In other organizations, the practitioner acts as a resource, and does not offer direct intervention routinely. In these organizations, the practitioner might be responsible for providing effective education and resources that support individuals and teams, including the Belgian purchasing team and the West African executive, in developing their own cultural competence. In either scenario, simple metrics that consider the success of the practitioner’s contribution in the area of cultural competence can be shaped.

By attaching straightforward, business-based metrics to each competency, or even to each competency category, organizations answer the elusive question posed at the beginning of this report: what, exactly, does the D&I practitioner do?

Conclusions

Rapidly changing business realities require today’s global D&I practitioner to meet higher expectations than ever before. Emphasis has progressed from valuing differences, which was largely achieved through awareness training and multi-cultural celebrations, to strategic business growth, with a focus on cornering new markets, building the effectiveness of global teams, and managing brand reputation.

More than ever, companies are seeking the expertise of D&I practitioners to instill knowledge and skills to forge new competitive ground for their organizations, build relationships, and develop credibility across cultural contexts. The D&I Competency Model, a set of globally applicable, measurable competencies for D&I practitioners at multiple levels introduced in this report, reflects this more public, decidedly strategic role.

This model will support organizations in hiring and managing D&I practitioners, and completing succession plans that ensure the function’s long-term viability. It is our expectation that, in some parts of the world, competencies may remain stable, yet the definitions may require some alterations. In other cases, organizations may wish to enhance or customize the model so that it is specific to a region or sub-region.

We recommend that organizations design simple, clear measures for use with The Conference Board’s global D&I competencies. Ask the question: how can this person use this competency to strengthen the business? Or, what does this person need to achieve to further our organizational goals?

By attaching straightforward, business-based metrics to each competency, or even to each competency category, organizations lay the foundation for D&I practitioners to achieve success, thereby best supporting organizational goals.

⁶ Duncan Jackson. “Measuring Up” *Management*: April, 2007.

Survey

The Diversity & Inclusion Competency Research Project

Pre-Session Survey Questionnaire

Council Member (please check your council name):

- | | |
|--|--|
| <input type="checkbox"/> Council on Work Force Diversity | <input type="checkbox"/> Diversity and Inclusion Strategy Council |
| <input type="checkbox"/> Council of Diversity Executives | <input type="checkbox"/> European Council on Diversity and Work Life |
| <input type="checkbox"/> Diversity Business Council | <input type="checkbox"/> Canadian Council on Inclusive Work Environments |
| <input type="checkbox"/> Diversity and Inclusion Council | |

For members of all councils except the Council on Work Force Diversity, please put a check in front of the wording below that best describes your company:

- U.S. owned, headquartered in U.S. with operating units only in U.S.
- U.S. owned, headquartered in U.S. with operating units both inside and outside U.S.
- U.S. owned, headquartered outside U.S. with operating units both inside and outside U.S.
- Non-U.S. owned, headquartered in U.S. with operating units both inside and outside U.S.
- Non-U.S. owned, headquartered outside U.S. with operating units both inside and outside U.S.

For Council on Work Force Diversity members: Your Name: _____

Note: Throughout this survey, the following definitions are intended:
domestic refers to the country where your company is headquartered
global refers to operations in countries outside of the country where your company is headquartered

For items I thru VII, please list your Top 3 responses. NOTE: For each question, if you have additional critical items that you feel are essential to include, please add them!

- I. The Top 3 current competencies or leadership needs that have emerged over the past 5-10 years in the knowledge, skills and/or attributes diversity professionals must demonstrate to successfully execute diversity culture change strategies.
 1. _____
 2. _____
 3. _____

- II. The Top 3 factors, professional and/or personal, you feel have contributed most to your success as a diversity professional.
 1. _____
 2. _____
 3. _____

- III. The top 3 factors, professional and/or personal, that diversity professionals specifically need in order to achieve global success.
 1. _____
 2. _____
 3. _____

- IV. The top 3 determiners of whether a domestic Diversity culture change strategy will be successful.
 1. _____
 2. _____
 3. _____

- V. The top 3 determiners of whether a global Diversity & Inclusion culture change strategy will be successful.
 1. _____
 2. _____
 3. _____

- VI. The organization's top 3 major challenges/barriers to the organization making progress in implementing domestic Diversity.
 1. _____
 2. _____
 3. _____

- VII. The organization's top 3 major challenges/barriers to the organization making progress in implementing global Diversity & Inclusion.
 1. _____
 2. _____
 3. _____

Acknowledgments

The Conference Board would like to thank the members of The Conference Board's Diversity Councils for the genesis of this report, and for the content, time, and commitment to making it a reality. These are the leaders, in thought and action, who have blazed a new trail in a field that once addressed only compliance, and created a discipline that enhances profitable business around the world. It is their experience, insight, and vision that have defined this critical field of work, leaving a legacy of thoughtful, courageous, and influential achievements to the next generation of inclusion executives.

We would particularly like to thank The Campbell Soup Company, which so generously shared their Compass Model as a framework for our own.

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About this Report

The competency model contained in this report is the result of an intensive, two-day working session of The Conference Board's Council on Workforce Diversity, with representatives from the Diversity & Inclusion Council and the Diversity Business Council. In preparation, 76 members of the U.S. Diversity Councils shared their thinking on competencies required of a D&I Practitioner today. Forty-four of these, or 77 percent, work for organizations with global operations.

The Campbell Soup Company generously offered their Compass Model to provide structure for our work. We developed our own content, and used The Campbell Soup Company's framework to organize our thoughts. The model includes 1) categories of like competencies, 2) the competencies themselves, and 3) behaviorally based definitions for each competency. The competency model consists of seven categories, each of which has three to six associated competencies.

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About the Author

Indra Lahiri, PhD is an organizational psychologist, cultural anthropologist, and founder of Global Inclusion Strategies. Multi-cultural herself, Indra combines personal insights, professional experience with organizations around the world, and academic knowledge of cultural differences, to provide forward-thinking and realistic consultation, coaching, and support for organizations wishing to shift from merely having an international presence to being truly global. Success is evident in measurable results for client organizations, including increased market share, enhanced reputation, reduced turnover and increased employee engagement. Clients have routinely received awards and recognition for their diversity and inclusion success. You can email her at indra@globalinclusionstrategies.com

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