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# A Retrospective View of Corporate Diversity Training From 1964 to the Present

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*Although its effectiveness has been questioned, over the past 30 years diversity training has become common practice in the corporate arena, as a myriad of workforce differences has gained increasing attention. The emphasis of this training has evolved from compliance-oriented content (mid-1960s to early 1980s) to improving working relationships (mid-1980s to mid-1990s) to a more recent focus on accepting and leveraging all dimensions of diversity based on the belief that enhanced business performance will result. Our purpose here is threefold: (1) to provide an historical context for diversity training in corporate America; (2) to highlight for illustrative purposes the diversity training experiences of two corporations (Sodexo, Inc., and Hewitt Associates) that have taken comprehensive approaches; and (3) to address current issues in the context of the future of the industry.*

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Diversity is one of the most popular business topics of the last 2 decades. It ranks with modern business disciplines such as quality, leadership, and ethics. Despite this popularity, it is also one of the most controversial and least understood topics.

Rooted in social justice philosophy, civil rights legislation, and more recently, business strategy, diversity has evolved into a rather amorphous field where the very word itself invokes a variety of meanings and emotional responses. A recent survey conducted among human resources (HR) and diversity practitioners examined how they defined diversity (Society for Human Resources Management, 2008). At least eight definitions emerged, and 71% of respondents indicated that their organization did not have an official definition. That same year, according to a survey of 265 HR professionals and diversity specialists from companies with an average of 10,000 employees, 55% of respondents had a diversity department, and over 80% reported having either mandatory or voluntary training for all levels of employees (*The New York Times*, 2007).

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To address these issues we first, chronicle the history of diversity training in corporate America. Second, we draw on our combined 50 years' experience in the diversity industry to select two corporate diversity case studies—Sodexo, Inc., and Hewitt Associates—to give the reader examples of real diversity training programs. Finally, we explore several current issues as well as consider the future of the industry.

## **Phase 1. Precursor to Diversity: Focus on Compliance**

### *The 1960s and 1970s*

To understand the evolution of diversity training, it is useful to trace its roots. There is a tendency to group any training that is associated with race, gender, ethnicity, or other demographic difference under the umbrella of "diversity;" however, there are specific types of training, some of which pre-date the Civil Rights Act of 1964, that should be recognized as separate and distinct from diversity training, including race relations, anti-Semitism, and anti-racism training. Such training, while vital and an important part of the history that has influenced today's genre of diversity training, is outside the focus of this article.

Initial diversity training efforts in the 1960s centered on legislation and compliance. Title VII of The Civil Rights Act of 1964 made it illegal for employers with more than 15 employees to discriminate in hiring, termination, promotion, compensation, job training, or any other term, condition, or privilege of employment based on race, color, religion, sex, or national origin. Since its enactment, Title VII has been supplemented with legislation that prohibits discrimination on the basis of pregnancy, age, and disability. In addition, sexual harassment is also now deemed to be illegal under Title VII.

This landmark legislation spawned an era of training in the late 1960s and 1970s, largely in response to the barrage of discrimination suits that were filed with the Equal Employment Opportunity Commission (EEOC). If the EEOC or state agencies found "probable cause" for discrimination, one of the remedies was typically a court-ordered mandate for the organization to train all employees in antidiscriminatory behavior. For example, a 1977 EEOC consent decree with Duquesne Light Company in response to alleged discrimination against Blacks and women required Duquesne to provide EEO training to its managers (Equal Employment Opportunity Commission, 2008).

Obviously companies wanted to avoid costly and embarrassing lawsuits and negative publicity, and therefore, many voluntarily implemented training focused on imparting information on the legal requirements to managers and rank-and-file employees. However, there were some notable exceptions to strictly employing a compliance-and-litigation-avoidance approach. For example, IBM was one of the first companies to state that diversity was a moral imperative, and it continues to espouse that philosophy today (IBM, 2007). Ivancevich and Gilbert (2000) report that Xerox Corporation

also adopted a beyond-compliance, social responsibility position in the 1960s. The three underlying causes of this position were the personal commitment of founder Joseph C. Wilson and concerns motivated by riots in Rochester in the mid-sixties, and a class action discrimination suit in 1971. According to Ivancevich and Gilbert, Xerox top management has maintained a strong support for diversity, and as a result, the workforce at the time of their publication was "more diverse than the general population" (2000: 80).

Notwithstanding these and other notable exceptions, based on our experience, most training during this era was primarily the imparting of knowledge with recitations on the law and company policies, a litany of do's and don'ts and maybe a couple of case studies for the participants to ponder. The length of training varied widely from 1 hour to a full day, with a typical length of 4 hours. For most companies, the training was a one-time event, but some required (and many still require) brief periodic refreshers of company policies and signatures from every employee to acknowledge that they had read and understood the policies and the consequences of noncompliance.

Recipients of the early antidiscrimination training often left with a variety of emotions, few of them positive. Because the training focused primarily on treating historically underrepresented minorities and women fairly and equitably in White male-dominated environments and on avoidance of lawsuits, nonmembers of these groups resented their exclusion and felt that preferential treatment was being afforded to the targeted groups.

Another reason that the training did not resonate well with the dominant group is that the content made little connection to how the recommended changes in behavior would improve business results. Although the late Kaleel Jamison, founder of the Kaleel Jamison Consulting Group, outlined the need to transform organizational culture, policies, practices and structures to create work environments that allow all employees to do their best work (Jamison, 1978), it would be a full decade before companies earnestly considered the role of inclusive organizational cultures as key drivers for the success of diversity efforts.

## **Phase 2. Focus on Assimilation**

### *The Early 1980s*

Compliance-oriented training continued into the early 1980s, but there was a period of retreat from the intensity of the previous decade. The greatest

increase in racial and gender diversity in the workplace occurred in the 1970s during the period of most intense government enforcement of the Civil Rights Act of 1964. The rate of change stalled during the 1980s, with the exception of increases of women entering the workplace (Tomaskovic-Devey, Stainback, Taylor, Zimmer, Robinson, & McTague, 2006). The decreased focus on compliance was due at least in part to President Reagan's deregulation policies, which contended that "intensive, fine-grained regulation of business led firms to opt out of compliance altogether. Goals, such as . . . reduced discrimination, would be elusive under intense regulation" (Kalev & Dobbin, 2006: 862). Reagan thought that employers should be more responsible for their own discrimination policing. He appointed Clarence Thomas as head of the EEOC, and Thomas disapproved of conciliation agreements that included goals and timetables for increasing representation of underrepresented groups, with the intent of giving employers more latitude. With less scrutiny from the federal government, many companies turned their attention to other pressing concerns of the day, such as offshore competition and improving quality. Affirmative action and equal employment training, while still included in the training catalogs, were scaled back as a cost-cutting effort, perhaps mandatory only for those in managerial positions and in some instances eliminated altogether for the rank-and-file employee.

Some organizations that conducted training during this lull were more likely to present content with the objective of helping women and people of color to assimilate into existing corporate cultures by creating special training programs based on the assumption that these new corporate entrants were less prepared because they had not yet developed the necessary managerial skills to be effective managers (Fernandez, 1981).

One such program was designed by Dr. Jeff Howard based on Albert Bandura's (1994) original concept of self-efficacy. Bandura theorized that people's beliefs about their capabilities result in performance that influences events impacting their lives. Olson (1993) reports that Howard designed programs for minorities and women based on the assumption that they lacked the self-confidence to demonstrate their talents in different and sometimes unwelcoming environments, in contrast to the prevailing belief that these new entrants into the corporate world were less qualified. Howard theorized that people of color and women underachieved in their careers due to internalized oppression. His research found that achievement was based on a combination of effort and confi-

dence (efficacy), that the process of development can be learned, and that effective effort in the face of adverse conditions results in strong performance and greater self-confidence. Still popular today, J. Howard & Associates (now Novations) was founded in the mid-seventies to apply his efficacy theory in the development of people of color and women, reinforcing the contention that if they master their response to negative stimuli, however subtle, they stay in control and respond in ways that increase their likelihood of success.

### Phase 3. The Diversity Field is Born

#### *The Late 1980s*

In 1987, *Workforce 2000*, published by the Hudson Institute, was released and resulted in a startling revelation for many businesses (Johnston & Parker, 1987). In the preface of the Hudson Institute's second book on workforce trends, *Workforce 2020*, the authors write: "[A]lthough think tanks seldom produce bestsellers, *Workforce 2000* proved to be an exception to the rule" (Judy & D'Amico, 1997: xii). It showed that the demographic makeup of the "net additions" into the workforce would be comprised of more women and minorities. The report was commonly misinterpreted in the press as intimating that there would be a *total* rather than a *marginal* change in ethnic and gender diversity. Baby boomer retirements, increased immigration, and the entrance of more women and ethnic minorities into the workforce would have little real impact, since the net new addition is relatively small in absolute terms versus the total number in the labor force (Friedman & DiTomaso, 1996). Nonetheless, *Workforce 2000* created a major shift in thinking about the future composition of the workforce and is credited with putting the term "workforce diversity" into the business lexicon and creating an important rationale for the diversity industry.

These new data shifted the discussion from how to comply with legal mandates to how to assimilate what was thought to be additional large numbers of women and minorities into existing, homogenous corporate cultures. Even with affirmative action, the progress of increasing the number of women and minorities into the workforce had been slow. Corporations were experiencing difficulty meeting their affirmative action goals, and, while recruiting underrepresented groups posed a significant challenge, retaining women and minorities was (and continues to be) an even greater problem.

During the period from 1965 to 1988, the corporate sector paid little attention to how having different

backgrounds and experiences would impact the ability of the dominant group and the "new minority" groups to work together effectively. An unwritten expectation that the new entrants would conform to the dominant group culture prevailed, which partly explains why the early 1980s training was more focused on helping minorities and women assimilate.

But 3 years after the release of *Workforce 2000*, Roosevelt Thomas shifted the paradigm of diversity from compliance to a matter of business survival (R. R. Thomas, 1990). He argued that recruitment was not the central problem; rather, the more serious problems began once someone was hired (Thomas, 1990). Overwhelming data demonstrated that the careers of minorities and women plateau and few were breaking into higher level positions:

Affirmative action had an essential role to play and played it very well. In many companies and communities it still plays that role. But affirmative action is an artificial, transitional intervention intended to give managers a chance to correct an imbalance, an injustice, a mistake. Once the numbers mistake has been corrected, I don't think affirmative action alone can cope with the remaining long-term task of creating a work setting geared to the upward mobility of all kinds of people, including white males (Thomas, 1990: 108).

He wrote that the goal should be to create an environment "where we is everyone." Thomas argued that something else besides affirmative action was needed. "That something else consists of enabling people, in this case minorities and women, to perform to their potential. This is what we now call managing diversity" (Thomas, 1990: 108). The managing diversity paradigm paved the way for the next iteration of diversity training.

#### **Phase 4. A Decade of Fostering Sensitivity**

##### *Late 1980s to Late 1990s*

The fundamental shift was from compliance, and focusing only on women and racial ethnic minorities, to incorporating everyone, including White men, under the umbrella of diversity. The philosophy was to make everyone more aware and sensitive to the needs and differences of others. However, it is important to note that during the early years of the inclusive definition of diversity, White men were not viewed as having valid issues about their place in the new more diverse workplace.

They were primarily viewed as the problem and in need of "fixing." To compound matters, no consensus model emerged among the expert consultants and practitioners to help companies address these issues. Some believed that the broad definition of diversity diluted the issues of unequal treatment that women and racioethnic employees continued to face. With social justice as their mantra, they were adamant for the need to keep the focus on the adversities that historically underrepresented groups faced in the corporate arena. Others embraced the notion that diversity was more than race and gender, while outlining the primary and secondary dimensions of diversity (Loden & Rosener, 1991). Under this model, primary dimensions such as race, gender, physical abilities, age, and sexual orientation are distinguished from secondary dimensions because they are more likely to be visible or mostly unchangeable, whereas the secondary dimensions such as education, function, geography, thinking and communication styles may equally advantage or disadvantage an employee but are not immutable.

Although the new rhetoric proclaimed that affirmative action and compliance were different from diversity, many companies continued to combine compliance and diversity training. It was not uncommon for training content to start with compliance topics and then move to diversity content about valuing and respecting differences. This served to confuse learners, who mostly left this type of training believing that diversity was nothing more than a new euphemism for affirmative action.

Thus, the various training approaches ranged from an emphasis on social justice to sensitivity and awareness and appreciation of differences, to Roosevelt Thomas' connection of diversity to business outcomes. And the topics ranged from more focus on race, or gender, and often work-life balance, depending on the emphasis the organization chose. Issues such as sexual orientation, age, and disabilities received little if any attention in the training at this time. While the approaches obviously overlap somewhat, depending on the underlying belief system of the designer, the training content and desired and actual outcomes could be very different.

The training also took on varying degrees of intensity. At one extreme, it was an "in your face," "admit your guilt" session for White men to "confess and repent." This left them feeling defensive, and thus concepts like "backlash" and "reverse discrimination" emerged. Contributing to backlash ideas during this era was the historic Bakke decision, where Allan Bakke, twice denied admis-



sion to a California medical school, alleged reverse discrimination. While the Supreme Court's decision was ultimately split in 1978, he was admitted even though the Supreme Court also upheld affirmative action (Bennett-Alexander 1990).

At the other end of the spectrum, this era's diversity training was so "watered down" that everyone left happy but wondering what the problem was.

In an effort to provide more structure to understand the various approaches, David Thomas and Robin Ely (1996) postulated that there are three different paradigms as outlined in Table 1: discrimination and fairness, access and legitimacy, and learning and effectiveness. These three paradigms roughly correspond with approaches taken to training. At the time they argued that most companies embraced the first two paradigms and that the learning and effectiveness aspect was just beginning to emerge and be understood.

There were great expectations for the outcomes of the training. At the very least, behaviors would be altered and there was often an implicit assumption that attitudes and mind-sets would also shift. Although it is unrealistic to expect sustained change in what was typically no more than a 1-day exposure, much disappointment was expressed when companies observed no real difference in the work environment.

As one possible way to understand why diversity training fell short of the desired outcomes, consider Robert Hargrove's (1995) concept of "triple-loop" learning. Based on original work by Chris Argyris and Donald Schön (1974), Hargrove distinguishes between single-, double- and triple-loop learning in the context of coaching. Single-loop or incremental learning encourages skill development; double-loop learning has the goal of reshaping patterns of thinking; and triple-loop or

transformational learning creates a fundamental change in perspective and self-awareness. Hargrove contends that much corporate learning is focused at the single-loop level.

Even though the stated goal of diversity training during this era was generally couched in terms of raising awareness (not even single loop at this juncture), there was an implicit expectation that at the very least behaviors would change (single loop) and a hope that patterns of thinking would shift (double loop). When no changes in behavior or patterns of thoughts were observed, the diversity training was deemed a failure. The shortcoming was likely due to the unavoidable tradeoff between designing an educational experience that would meet the goals of shifting behaviors and mind-sets and the need to develop cost-effective ways to train large number of employees. In the vernacular of the field, the latter is known as the "check-off-the-box" approach. Such "check-off" training was evaluated not by its effectiveness, but rather by the number of people who were trained.

The content of diversity training during this period was usually a mixture of cognitive and experiential learning techniques. One very popular and effective (albeit controversial) experiential exercise designed to show the relationship between adverse treatment and performance was dubbed "Blue Eyes/Brown Eyes." Jane Elliot, an Iowa public school teacher, conceived the experiment in the aftermath of the assassination of Martin Luther King. She separated students by the color of their eyes and told them that one group was superior (Blue Eyes) to the other group (Brown Eyes), and therefore, was entitled to better treatment. The group that thought it was superior performed better and the group that was treated poorly performed worse (<http://www.janeelliott.com>). Psy-

**TABLE 1**  
**Overview of Thomas & Ely's (1996) Model**

Discrimination and Fairness Paradigm	Access and Legitimacy Paradigm	Learning and Effectiveness Paradigm
<ul style="list-style-type: none"> <li>--Equal opportunity</li> <li>--Compliance with EEO regulations</li> <li>--Fair treatment</li> <li>--Focus on the numbers</li> <li>--Concern with creating mentoring and career development programs for women and people of color</li> <li>--Supports assimilation and color and gender-blind conformism</li> </ul>	<ul style="list-style-type: none"> <li>--Acceptance and celebration of differences</li> <li>--Market-based motivation for competitive advantage</li> <li>--Motivation is to attract multicultural talent to understand and serve customers and gain legitimacy with them</li> </ul>	<ul style="list-style-type: none"> <li>--Different perspectives and approaches to work are valuable</li> <li>--Acknowledgment that learning and relearning are central to leveraging diversity</li> <li>--Organization fosters personal development that brings out people's full range of skills</li> <li>--Recognition that employees often make business choices that draw on their cultural backgrounds</li> <li>--"We are all on the same team, with our differences—not despite them."</li> </ul>

chologists have conducted similar experiments for decades, helping us to understand the behavioral effect of our subconscious bias about difference among and across people and groups. This one exercise was probably the most memorable and transformative for participants during this era of diversity training. It continues to be a powerful approach to showing the impact of disparate treatment.

Another popular exercise during this period was called "adjectives" and like the "Blue Eyes/Brown Eyes" experiment, often left participants angry and frustrated. Designed to help participants understand the stereotypes that are commonly held about various groups, it required them to write down the first words that came to mind when they thought of different groups such as African Americans, Latinos, Asians, women, people with disabilities, and people over 40, and to post them under the respective labels. Even though facilitators were careful to point out that this did not necessarily reflect participants' feelings about the groups, most generally believed that the words, mostly negative, reflected true feelings. For example, common descriptors for Blacks included lazy, looking for a handout, uneducated, and whiners. Adjectives for women included soft, sensitive, and not as physically strong as men. In contrast, White men were often described as strong, providers, protectors, and leaders. With insufficient time to adequately explore the historical and sociological roots of these generalizations about different groups, or how to change one's own perceptions, participants were left needing much more debriefing and, in many cases, healing. So controversial was this exercise that many companies stopped using it. As an example of how this exercise backfired, in 1988, managers at Lucky Stores, a Dublin, California-based grocery chain, attended diversity training workshops, during which they identified common stereotypes for women and minorities. Notes taken by a company official during the training program included such comments as "Black females are aggressive" and "women cry more." An employee found these notes, read the stereotypes, and speculated that the characteristics listed were the reasons the company wasn't promoting more women and minorities. Employees sued the company for intentional discrimination. The judge allowed the employees to submit the notes from the workshops as evidence. Although the judge's ruling wasn't based exclusively on the training notes, the notes did contribute to the guilty verdict (Caudron, 1993).

As a less controversial but very effective approach, some organizations employed (and con-

tinued to employ) theater-based learning, using professional actors to demonstrate workplace environments. It allows participants to vicariously experience the issues, especially the subtle ones, which workers face in multicultural environments. As participants role-play with the actors, they are able to practice skills such as communication, providing feedback, reflective listening, problem solving, and an array of environmentally safe role-plays. These experiential exercises were an attempt to help participants learn about themselves and to simulate the experiences of others. The often unstated desire was for the type of personal transformation that Hargrove described as "triple-loop learning."

With little internal expertise during this era, many Fortune-500 companies hired diversity firms to train all employees. While a number of diversity training programs were well designed, faced with cost constraints associated with payrolls of 100,000+ employees, the content was sometimes squeezed into short timeframes or facilitated by internal trainers who lacked subject matter expertise. This led to the failure of participants to really grasp the complex and controversial concepts being presented because there was little time for discussion or reflection. Some of the unintended consequences were that many left confused, angry, or with more animosity toward differences. With no formal follow-up, employees were left on their own to interpret and internalize what they had learned. Many interpreted the key learning point as having to walk on egg shells around women and minorities—choosing words carefully so as not to offend. Some surmised that it meant White men were villains, still others assumed that they would lose their jobs to minorities and women, while others concluded that women and minorities were simply too sensitive.

Women and people of color did not necessarily leave with positive feelings about the training either. As the minority, some felt pressured to speak for their entire identity group. Feeling misunderstood, they sometimes left thinking that their co-workers were more biased and prejudiced than they had believed them to be prior to the training. When the training event was over, employees went back to their work environments with incomplete knowledge and little understanding about what would be different.

On the positive side, during this era, most corporations that were involved with diversity training wanted to do the right thing. They recognized that they were losing top talent, not fully engaging those who chose to stay, and that they had much to learn about how human differences could have a

profound impact not only in the day-to-day work environment, but also in business outcomes. By the end of the 1990s practitioners were more likely to understand that diversity could not be relegated to a program, but rather that it had to be viewed as an ongoing business process, like quality, and become integrated into the core strategy of the organization, and thus, positioning diversity education as a business driver gained solid footing by 1999.

### **Phase 5. New Millennium Paradigms for Diversity Learning**

#### ***Diversity and Inclusion for Business Success***

As outlined above, the motivation for the earliest diversity initiatives of the 1970s was compliance. The major impetus for the diversity initiatives that geared up in the late 1980s and through much of the 1990s was to foster sensitivity and respect for difference, primarily to enhance working relationships. While some organizations continue to view diversity training as tangential to core business issues, many of the programs now considered as best practice by the industry are fueled by the desire to achieve business success, profitability, and growth. Changing employee and customer demographics, increasingly more global business endeavors, and shortages of technically trained workers leading to fierce competition for talent compel America's largest companies to go beyond awareness of difference to developing inclusive organizations and diversity competent leaders. For example, Chevron has been conducting formal diversity training since the late 1980s and it has evolved from being affirmative action-based training to becoming a part of the business value chain to leverage higher performance (C. A. Young, General Manager, Chevron Services Company, July 2, 2007, personal communication).

The term "inclusion" (creating organizational environments that work for everyone), gained popularity in the late 1990s as a necessary extension to the concept of diversity (the types of differences in the workplace). To achieve inclusion, many practitioners advocate for both leaders and individual contributors to become culturally competent. Like other workplace competencies (e.g., leadership), diversity is increasingly being recognized as a needed business skill. While there are a number of definitions of cultural competence, Hewitt Associates offers the following: "A continuous learning process to develop knowledge, appreciation, acceptance and skills to be able to discern cultural patterns in your own and other cultures and be able to effectively incorporate several different world views into problem solving, decision making

and conflict resolution" (from Hewitt proprietary diversity training materials).<sup>1</sup>

Closer to the learning and effectiveness paradigm of Thomas and Ely (1996), the 21st century variety of diversity training is focused on building skills and competencies that enable learners not only to value differences but also to be able to utilize them in making better business decisions. There is consistent agreement among practitioners that ongoing learning is necessary to become diversity competent. Therefore, the type of training curricula that are being developed today by many companies with comprehensive diversity strategies are fundamentally more robust than the initiatives of the previous eras. They include more course offerings (e.g., separate classes on gender, sexual orientation, managing multiple generations, intercultural communication) and various types of learning modalities (e.g., e-learning, learning labs, learning communities, in-tact work group sessions).

Positioning diversity as a competency has created another major paradigm shift; the assumption is no longer that only certain groups need training (e.g., White men or minorities), but rather that all employees need to be more cross-culturally competent in an increasingly global world. It is just as important for an African American male to learn more about his Chinese coworker or vice versa.

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The authors believe that some key premises underlying the new paradigms for diversity learning reflect double- and triple-loop learning and include the ideas that:

- Diversity learning should be integrated, ongoing, relevant, applicable, and based on solid needs assessment.
- Diversity is a competency and as such the learning should be based on building blocks that start with elementary concepts and move on to increasingly more difficult material.

<sup>1</sup> From Hewitt Associates LLC propriety materials. © Hewitt Associates 2008. Reprinted with permission.

- Diversity learning should not just happen in the classroom but rather should be integrated into other business processes and activities.
- Diversity learning is no longer just a U.S. phenomenon. Many companies are expanding their efforts to include global learning.

For example, a resource tool used by some companies called *Global Diversity and Inclusion Benchmarks* (see Table 2), helps them to assess and measure how effective their activities are in providing comprehensive education to foster inclusion (O'Mara & Richter, 2006). The criteria for assessing diversity training range from 0% to 100%, the latter representing the best practice.

## CASE STUDIES

Sodexo, Inc., and Hewitt Associates were selected to serve as case studies because they provide examples of major global organizations in different businesses that have embraced very different, yet equally effective, diversity learning strategies. This section briefly chronicles the history of diver-

sity training at the respective companies and how they leverage the training as a critical component of systemic culture change to contribute to business success.

### Diversity Learning at Sodexo

Sodexo is the leading food- and facilities-management services company and one of the largest employers in the United States, with more than 110,000 employees and 16,000 managers. Worldwide, Sodexo Alliance employs 324,000 in 76 countries at 26,700 sites with total revenues of \$14.8 billion, of which \$6.3 billion are generated in North America. Sodexo offers innovative outsourcing solutions in food service, housekeeping, grounds keeping, plant operations and maintenance, asset management, and laundry services to 6,000 corporations, health care, long-term care and retirement centers, schools, college campuses, government and remote sites.

For Sodexo, diversity and inclusion are core el-

**TABLE 2**  
**Global Diversity and Inclusion Benchmarks Proposed by Julie O'Mara and Alan Richter**

0%	There is no formal diversity education. Discussions on diversity are not encouraged.
25%	Training and resources on diversity are brief and focused on educating employees on policies and meeting legal requirements. Persons designing and delivering training do not have specific expertise in diversity. A small diversity resource library and some tools are available to managers.
50%	Both diversity and intercultural training are provided, but they are treated separately and as stand-alone courses rather than being integrated with other courses. Programs address difficult and sometimes uncomfortable issues of stereotypes, bias, and "isms," and include skill development. Diversity experts or training professionals design and/or conduct the training; line managers and employees are trained to help conduct or cofacilitate some sessions. Instructor guides or toolkits are provided to supervisors and managers with the expectation that they conduct training as part of team meetings. The organization's diversity website, resource library of books, articles, videos/DVDs, e-learning, and other tools are used to educate employees and managers.
75%	The organization provides diversity training that focuses on knowledge about diversity, specific diversity dimensions, caring and compassion for others to employees at all levels and takes action to achieve the diversity vision; this training has been designed using proven instructional techniques. Employees in organizational functions critical to diversity management, such as human resources and customer service, receive additional diversity training. Diversity is included in other organizational training, such as supervisory training; diverse examples and techniques are used in training on any topic. Senior managers visibly endorse and voluntarily attend diversity training. Diversity professionals, managers, and employees help design, conduct, and reinforce the learning from training. The organization's diversity learning strategy addresses a broad spectrum of diversity dimensions and issues to meet the organization's mission, vision, goals, and performance management system. It includes a learning reinforcement strategy.
100%	Diversity training, including intercultural training, is integrated into the organization's general educational curriculum. Employees at all levels attend ongoing diversity training, including training for specific roles and responsibilities (e.g., customer service). Diversity education resources, including an extensive up-to-date library, are varied and fully supported by the organization.



ements of their business strategy. They are highlighted as one of its six strategic imperatives. Recognizing that training by itself cannot change the culture of an organization, Sodexo has taken a systemic approach to ensuring that diversity and inclusion are embedded in its culture in all 6,000 geographic locations. Addressing diversity and inclusion systemically involves a top down and bottom up strategy, which includes senior level commitment, robust metrics and accountability through an incentive compensation link, grass roots engagement through their employee affinity groups, and incorporating diversity and inclusion in all business and HR practices and policies.

Sodexo has explicitly linked diversity competencies to profitable business growth. It has set growth targets both domestically and internationally and determined that diversity learning is a business imperative needed to grow in the marketplace.

Sodexo proprietary materials<sup>2</sup> state that the philosophical beliefs underlying diversity learning as a business imperative include:

- Transforming Sodexo into a learning organization that engages employees at all levels in continuous understanding and application of diversity-related knowledge, awareness, and skills;
- Clarifying what is expected of managers regarding diversity and inclusion;
- Measuring and establishing accountability for learning and application; and
- Building diversity competency internally at all levels.

Anand (2005) reports that the diversity competencies at Sodexo include:

- Understanding and internalizing the business case for diversity and inclusion;
- Being aware of the diversity "angles" of every business challenge;
- Creating and maintaining a diverse and inclusive environment by developing management practices that drive hiring and promotion and foster the retention of talent;
- Building self-awareness and awareness of others' diversity dimensions and knowing how to leverage diversity as a competitive advantage;
- Managing an increasingly diverse workforce by developing and leveraging the talents of all employees and channeling their efforts toward achieving Sodexo's business goals and objectives;
- Engaging in culturally competent relationship management and customer service to secure and retain diverse clients and customers; and

- Partnering effectively with women and minority businesses to deliver culturally competent food and facility management services.

Conducting comprehensive diversity training since 2003, Sodexo integrates diversity learning into every aspect of its business. While still very important, it separates EEO and compliance training from diversity education. Approximately 15,000 employees have taken affirmative action and EEO training, and every 3 years they are required to take a refresher course. Front-line employees take a shorter version of the training.

Not surprisingly, diversity learning at Sodexo started with gaining buy-in from its senior leadership (see Figure 1). Sodexo's executive team engaged in learning about the business case for diversity and inclusion and being accountable for its diversity and inclusion change agenda. The senior executives' learning program is ongoing, with quarterly classroom experiences that are reinforced with supplemental learning through community engagement, sponsoring an affinity group as well as dialogues with the affinity groups, and mentoring diverse employees (Anand, 2005).

Paralleling the executive team's diversity learning strategy, all managers engage in continuous learning based on building blocks that provide various depths of instruction. Over the past several years, the available training has progressed from awareness to skill building, which continues today. Every manager takes a class called Spirit of Diversity (8 hours) as an introduction to Sodexo's diversity and inclusion commitment. Next, there is a portfolio of educational opportunities based on building blocks, including learning labs that are designed to continue to raise awareness and build skills around particular diversity dimensions. Each lab is 3 to 4 hours in duration and topics include cross-cultural communication, sexual orientation in the workplace, generations in the workplace, micro-inequities, and gender in the workplace. These are facilitated by a cadre of internal trainers, who undergo a train-the-trainer experience that includes self-awareness as well as skills to facilitate the content. Finally, diversity content is incorporated into all offerings through Sodexo University.

Also integral to Sodexo's strategy is the development of customized learning solutions for different functions. For example, a cross-cultural communication learning program was developed for recruiters, and "Selling to a Diverse Client Base" is offered to the sales force. Additionally, the diversity learning and development team responds to requests from internal clients to develop learning solutions for intact work teams to address their

<sup>2</sup> From Sodexo proprietary materials. © Sodexo, Inc., 2008. Reprinted with permission.

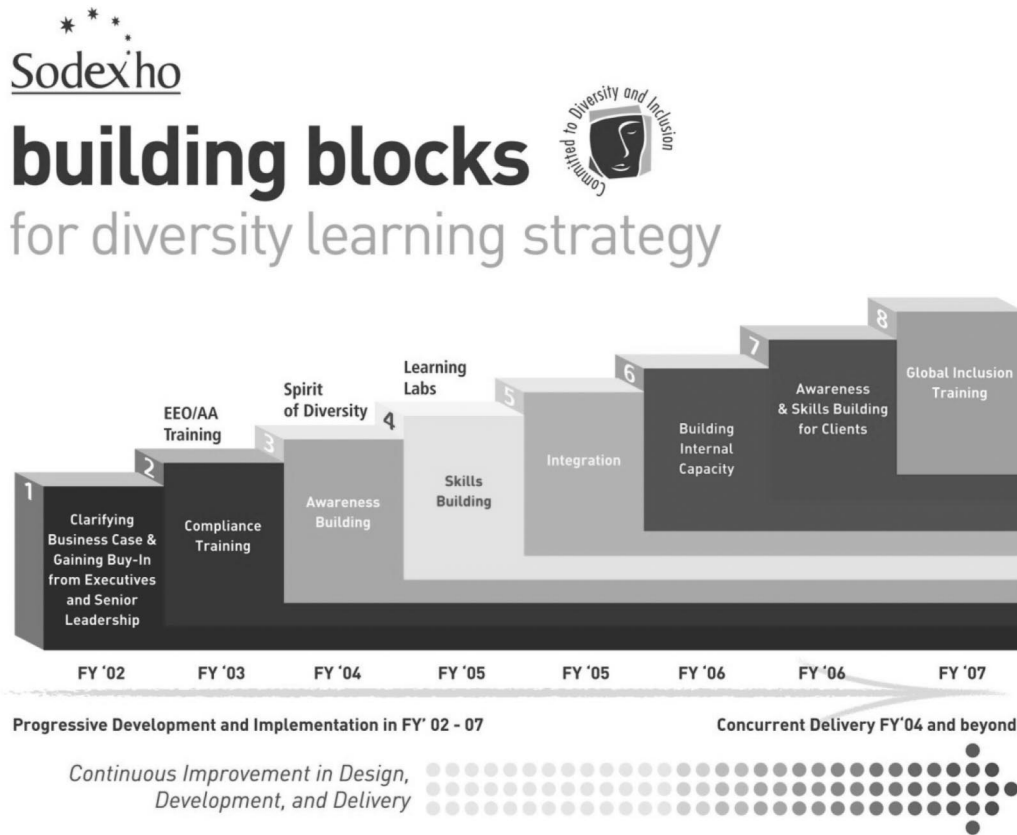


FIGURE 1

Sodexo's Programmatic Development of Diversity Training Opportunities. From Sodexo Proprietary Materials. © 2008 by Sodexo. Reproduced with permission.

specific needs in creating an inclusive culture, such as managing conflict across diversity. Training has been offered to leaders to support their issues and concerns and to leverage them as "full diversity partners" based on concepts developed by Bill Proudman. In 1996, Proudman "pioneered a white male only diversity workshop in response to seeing white male leaders and executives continually leave diversity change efforts solely to women and people of color" (Diversity Central, 2008). His firm, White Men as Full Diversity Partners, assists companies and organizations with creating new paradigms of diversity partnerships that include White men.

Outside the traditional classroom venue, Sodexo conducts diversity education at every senior leadership team meeting. Sodexo believes that its diversity training is making a positive difference. For example, its mentoring program, a component of the diversity initiative, has led to improved productivity, engagement, and retention of women and people of color. In a recent study conducted to assess the effectiveness of the program, there was an approximate return on investment (ROI) of \$19 for every dollar spent. In addition to the internal

gains, Sodexo's leadership in diversity and inclusion has generated new business opportunities and contributed to retention of clients. Several new business contracts were awarded to Sodexo, in part, because of their leadership in diversity and inclusion.

#### Hewitt Associates Measures Cultural Competency Among Leaders

Hewitt Associates is a \$3 billion (annual revenues) consulting and human resources outsourcing firm with over 25,000 employees. Unlike many companies that start their diversity initiatives with a massive training effort only to learn afterward that the organizational culture was not ready to address such complex issues, Hewitt took 2 years to lay a strong foundation of understanding, gain buy-in, and align its senior leaders around the business case for diversity at Hewitt.

After the 2 years of readying the organization, its first foray into training placed senior leaders in sessions with rank-and-file employees using theater-based education, where they learned how different the Hewitt experience could be for asso-

ciates from different backgrounds. After this experience, the CEO made a commitment to create an inclusive culture. He agreed that his senior leaders needed to be more culturally competent and decided they would initially undergo a self-assessment using a tool called the Intercultural Development Inventory (IDI). The IDI was developed by Mitch Hammer and Milton Bennett and measures respondent's intercultural sensitivity along a continuum from ethnocentric to ethnorelative (Bennett & Hammer, 1998). It is summarized in Figure 2.

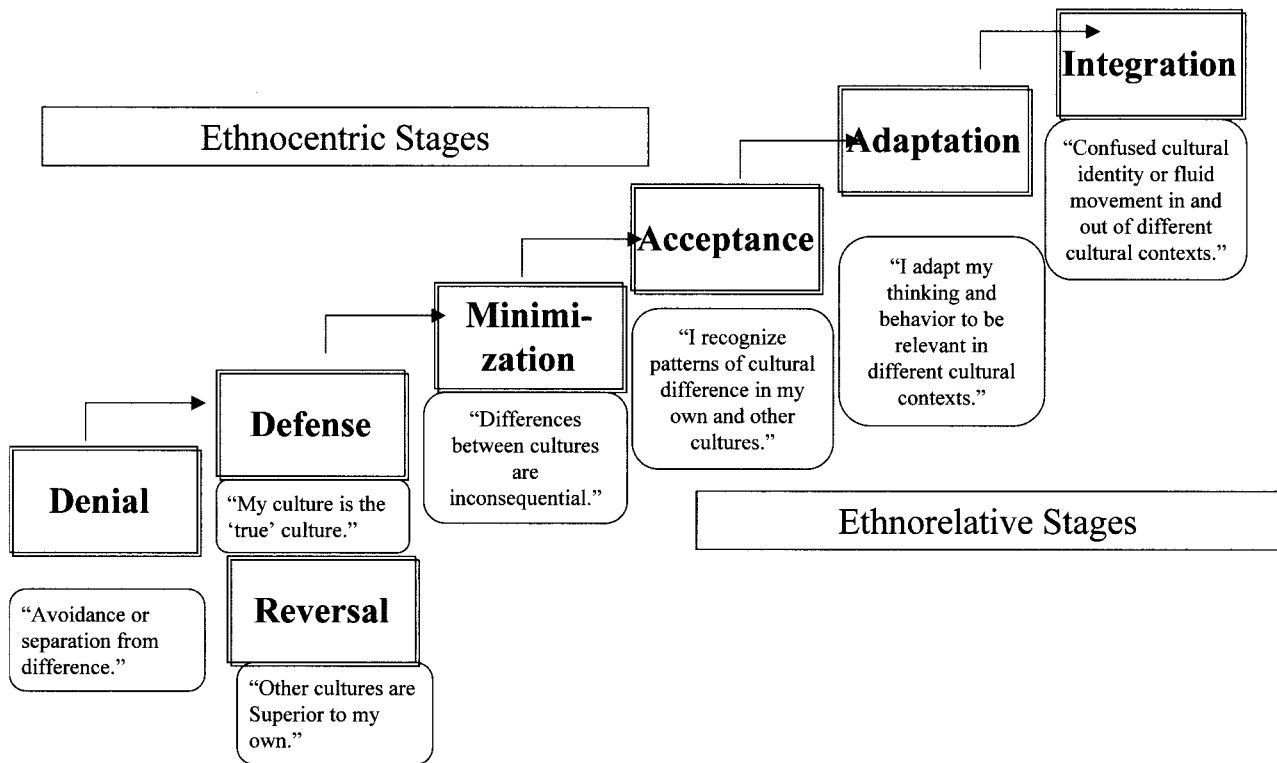
Similar to most people who complete the IDI, the majority of Hewitt leaders fell into the "minimization" category, a worldview that "people are basically alike and any differences we might have are inconsequential" (Bennett & Hammer, 1998). With the goal of moving leaders from "minimization" to "acceptance," which involves the ability to discern cultural patterns in one's own and other cultures, the learning for leaders was devised into a year-long experience called Cross-Cultural Learning Partners, which paired a senior leader in the company with an associate (usually lower ranking) different from him- or herself in some way (20 pairs). The partners received a lesson monthly and

spent 2 hours per month completing an assignment that included reading, watching movies, reflecting with their partner, and assessing applicability to workplace situations. Each lesson provided an in-depth coverage of some aspect of diversity and inclusion. It was an effective experiential approach that helped the leaders understand how different worldviews can be. At the end of the year-long experience, the IDI was readministered, and as a group, the leaders moved from minimization to acceptance, which provided Hewitt with quantitative evidence that the learning was effective (Hewitt proprietary data).<sup>3</sup>

**CURRENT ISSUES**

Diversity training still faces a number of issues as it evolves as an important component of many companies' overall human resource and business strategies. Key issues include the absence of effective measurement tools, gaining clarity on desired

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**FIGURE 2**

Overview of the Stages of Intercultural Sensitivity Identified by the Developmental Model of Intercultural Sensitivity. From "The Developmental Model of Intercultural Sensitivity," by M. Bennett and M. Hammer, 1998. Retrieved from <http://www.intercultural.org/pdf/dmis.pdf>. © 1998 by M. Bennett and M. Hammer. Adapted with permission.

outcomes, and assessing the suitability and effectiveness of technology-driven methods.

### Measuring the Effectiveness of Diversity Training

A number of studies from academicians have questioned the value of diversity training. For example, Kalev, Dobbin, and Kelly (2006) found that diversity training actually led to a decrease in representation of African American women in managerial ranks. These researchers analyzed corporate data from 708 companies dating back to the 1970s and measured progress based on racial composition of the managers group. The negative effect of diversity training was obtained after the researchers controlled many other factors, such as existence of a diversity staff, an affirmative action plan, and a formal mentoring program. These results are limited in at least two ways. First, most training in the 1970s was strictly compliance based and was very different from today's variety that links learning to business outcomes. It is possible that current approaches have a positive effect that was not apparent because it was overwhelmed by the negative effects of previous approaches. Second, the criterion was limited to representation of minorities in managerial ranks. Although this is very important, other outcomes such as retention and employee engagement are also important and were not included.

Research reported by practitioner-oriented groups and by companies tends to be more positive. For example, *DiversityInc* compared the results from 12 companies that it deemed to have the best diversity training programs (e.g., met criteria such as being mandatory, held frequently for at least one day, tied to business strategy, and having CEO commitment) with companies that did not measure up and found a correlation between the exemplary companies and retention of people of color (but not retention of women; Frankel, 2007).

Although it is difficult for companies to ascertain direct effects of training, they are increasing the sophistication of their research techniques. A sizable number of companies now include questions on their employee engagement surveys and track changes over time. Citigroup for example, has conducted diversity training (separate from compliance training) since the mid-nineties, and starting in 2003, it included a diversity index on its employee opinion survey (A. Durante McCarthy, director of Global Workforce Diversity & College Relations, Citigroup, Inc., personal communication, July 16, 2007). The index measures the extent to which employees feel included as well as their perceptions about the level of senior management

commitment to diversity. The responses to the diversity questions on the survey have improved more than other topics on the survey, which Citigroup attributes, in part, to their ongoing training commitment.

Likewise, Deloitte reported that it also uses the employee engagement survey as one means of measuring the effectiveness of their diversity and inclusion training. There are 13 questions representing support for diversity, and these consistently rate as one of the highest ranking indices on the survey (R. Anderson, former chief diversity officer, Deloitte, personal communication, July 17, 2007).

IBM uses the employee engagement survey method as a measure of training effectiveness as well. In addition, it measures changes in behavior attributed to training interventions. As an example, a training session was developed to change mind-sets of men who thought it risky to put women in leadership positions. It significantly increased the number of women going into executive roles (R. Glover, VP Global Workforce Diversity, IBM Corporation, personal communication July 10, 2007).

Even though there is a prevailing belief among many practitioners that diversity training is valuable, the reality is that many questions remain about its effectiveness, and there is a dearth of accurate tools that make explicit connections to changes in behaviors and attitudes. But there are opportunities for practitioners and academicians to come together to develop such tools.

### Gaining Clarity on the Desired Outcomes of Diversity Training

To assess its effectiveness, there must be a clear understanding of what diversity training is intended to achieve. The Kalev et al. (2006) research mentioned above found a negative effect of diversity training on representation of African American women in managerial positions, but is increased representation an explicit goal of diversity training? Perhaps implicitly, diversity training influences the hiring and promotion decisions that managers make as a result of heightened awareness and changed attitudes. However, objectives are typically stated in more concrete and immediate terms. Michael Wheeler reported, "too often the overall objectives of the program are not clearly articulated," leading to the failure of a number of diversity training programs (Wheeler, 1994). There are often both micro- and macro-level objectives, the former being focused on imparting knowledge or changing behavior, and the later encompassing issues such as culture change, greater retention,



and improved productivity. The stated objectives for Hewitt's "Power of World View Training" (Hewitt proprietary data) are:

- To better understand ourselves and how our own worldview shapes our beliefs and behaviors;
- To better understand the worldviews of others; and
- To begin to understand how to work effectively across cultures to enhance the work we do.<sup>4</sup>

The full-day "Spirit of Diversity" course at Sodexo strives to: (1) heighten awareness; (2) build skills; and (3) clarify the expectations and responsibilities of managers to create and maintain a diverse and inclusive workplace (Anand, 2005).

But how do the stated objectives of diversity training connect with the desired longer term outcomes? As discussed earlier, the unstated goals often include changes in mind-sets, which imply altered beliefs and values. Some are optimistic enough to think that diversity training will lead to epiphanies ("triple loop") and when they don't happen wonder why employees don't "get it." Is it realistic to achieve these higher levels of transformation from diversity training or is diversity training just one input among a number of experiences that are required to change one's way of thinking and being? Should diversity training attempt to address this level of change?

Much more discussion is warranted to clarify what practitioners really expect diversity training to accomplish. With greater clarity, it will be easier to establish the appropriate measures.

### Technology-Driven Methods

Many more companies are turning to e-learning solutions for diversity training. IBM has developed a number of offerings, including topics ranging from generations in the workplace to people with disabilities. As one measure of effectiveness, they track the number of people who have accessed the websites. They have also built in follow up to determine how much of the material is being retained (Glover, personal communication, 2007).

Webinars have gained popularity, as they allow real-time interaction among participants in a distance-learning mode. It is cost effective to train people from around the globe using this methodology.

Critics of e-learning solutions point to the fact that the format doesn't allow for conducting group

experiential exercises, and some companies are therefore combining e-learning with classroom training. For example, Hewitt developed a 1-hour e-learning program as a prerequisite to its in-class course. The e-learning class focuses on the business case for Hewitt with facts and statistics and case studies relevant to the business.

Sodexo recently developed some specialized training for their affinity groups and has incorporated both classroom and e-learning methods.

And, as the technology of Web 2.0 becomes more sophisticated, the ability to conduct experiential training "on-line" becomes more feasible. The FutureWork Institute is using SecondLife technology to simulate diversity experiences. SecondLife is an immersive, 3-dimensional social interaction environment, which allows "residents" to own space in the virtual world, develop Avatars (one's persona in the virtual world), and experience different worlds and cultures (M. Regan, president, Future Work Institute, personal communication July 17, 2007).

The issue of evaluating the effectiveness of the training is just as much a challenge for e-learning solutions as it is for non-electronic training. Another challenge for e-learning solutions is presenting complex, sometimes controversial material in a format that typically limits interaction and discussion.

## THE FUTURE OF DIVERSITY EDUCATION: INTEGRATION, GOING BROADER AND DEEPER

### Integration

Integrating diversity and inclusion principles into the core fabric of the business strategy is a key distinction from previous diversity efforts. Even though Roosevelt Thomas made the business connection as early as 1990, it took most of the decade for companies to really understand what it meant to attempt to integrate diversity into the business strategy and then to actually execute it. Many more companies, even today, avow diversity as a core business strategy, but in reality have not yet fully implemented a process for actualizing this goal.

There are increasing visual markers that indicate more companies are moving in the direction of elevating diversity as a core business strategy, which include the proliferation of the chief diversity officer positions and the increase in the number who report to the C-Suite. According to the *New York Times* Survey referenced above, 42% of chief diversity officers report to the C-Suite, and 67% said that one of their major responsibilities is link-

<sup>4</sup> From Hewitt Associates LLC propriety materials. © Hewitt Associates 2008. Reprinted with permission.

ing diversity strategy with the company's overall business strategy (*The New York Times*, 2007). More and more companies are integrating diversity content into other courses, such as leadership development, sales training, and conflict resolution.

As mentioned above, diversity and inclusion are completely integrated into both Sodexo's and Hewitt's overall business strategies, as shown in Figures 3 and 4. Both companies link their strategy to the corporate vision; for Hewitt, "Making the world a better place to work" and for Sodexo, "Improving the quality of daily life." Both connect diversity and inclusion to their stakeholders.

### Going Broader

Corporations are beginning to explore global diversity issues. Based on interviews with representatives from Chevron, IBM, Sodexo, Citigroup, Campbell Soup, and Merck, they are starting to conduct training globally (Personal communication with C. A. Young, Chevron; R. Glover, IBM, G. Houston, Campbell Soup Company, D. Dagit, Merck & Company, July 2007). Some companies such as Hewitt have already incorporated domestic diversity content with global issues in their training, adapting the content from country to country. Each firm tailors the training to meet the needs of the specific geographic region. For example, Merck has gender-based training in Japan and a program focusing on people with disabilities in Spain. Chevron's office of diversity works with op-

erating units worldwide to show them how diversity is aligned with the overall business strategy. Campbell Soup uses a tool to assess global leadership styles based on cultural differences (e.g., How Australian leadership styles might differ from U.S. ones).

The term "diversity" is not well accepted or understood outside the United States and often meets resistance, as it is deemed a U.S. export. Given that U.S. companies were the first to appoint chief diversity officers (CDO), most CDOs recognize there is a risk of putting a U.S. lens on global issues and not fully understanding the complexity or the vastness of these multifaceted concerns. For example, concepts such as castes, tribes, and other cultural and socioeconomic systems that also include education, religion, language, and ability, increase exponentially in complexity in a global context. Currently many people charged with developing diversity training reside in the United States and may lack a depth of global acumen. In the near future, we will likely see an increasing trend of more individuals with strong global expertise assigned to diversity and inclusion responsibilities and many more CEO counterparts outside the United States.

### Going Deeper

Initial diversity training typically packed many topics into one course, yet was only able to address

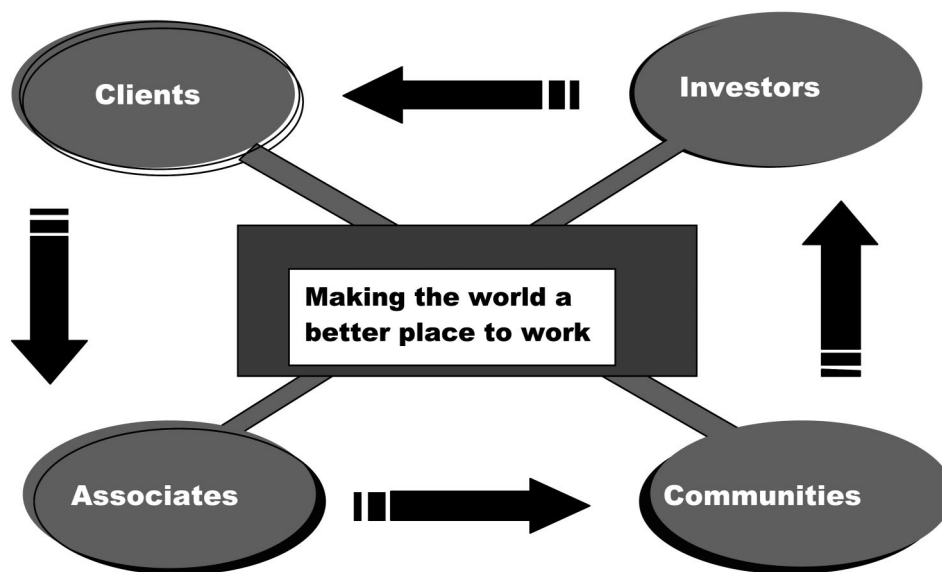


FIGURE 3

Hewitt's Integrated Diversity Strategy: The Stakeholder Value Chain. From Hewitt Proprietary Materials. Hewitt 2008. Reprinted with permission.

## Improving the Quality of Daily Life



**FIGURE 4**

**Sodexo's Integrated Diversity Strategy. From Sodexo Proprietary Materials. © 2008 by Sodexo. Reproduced with permission.**

each topic in a cursory way. In an effort to build skills and competencies, more companies are now separating the topics into individual courses to allow more in-depth learning and practice. As in Sodexo, topics such as gender, people with disabilities, sexual orientation, race, "White men as full diversity partners," selling to a multicultural environment, work-life issues, and generational differences, may be part of a suite of courses. Some firms also use a matriculation model, requiring prerequisites before moving on to more difficult material. Companies that are leaders in diversity and inclusion are also developing different learning strategies for the various levels in their organization, such as executives, midmanagement, and functional groups. Furthermore, some organizations, like Sodexo and Chevron, customize topics for in-

tact work teams, recognizing that the one-size-fits-all approach cannot yield the desired outcomes.

Whereas early diversity training did not explicitly seek changes in behaviors but rather was designed to raise awareness, today it is very clear that the expected outcome is demonstrated behavioral competencies in diversity and inclusion.

To effectively go deeper, many companies realize that they have to dedicate resources to diversity learning. To insure content expertise many "best in class" companies now have diversity learning as a part of the diversity and inclusion function or a strong dotted line from the training organization to the diversity office. These functions also provide internal content consulting to ensure that diversity and inclusion are integrated, wherever possible, into all training offerings.

## SUMMARY

Diversity and inclusion training has survived a range of critiques that have developed over time and at each phase of this nascent field as the different philosophies and approaches emerged. Some early training was ill-conceived, as companies hurriedly tried to put something together in response to court orders or public pressures, and the adage that bad news travels faster than good is apropos.

However what does seem to be clear from this retrospective is that the companies willing to experience trials and errors in the name of continuous improvement have emerged today on solid footing, with effective curricula that make a distinct link to business outcomes. Although conclusive data on the effectiveness of modern day diversity training is still lacking and very much needed, many major corporations believe that such training is an essential component to the success of their human resource strategies as well as to their overall business outcomes.

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