



Retaining and Developing High Potential Talent

***Promising Practices in Onboarding, Employee Mentoring
& Succession Planning***

TABLE OF CONTENTS

Executive Summary	3
Diversity and Inclusion	4
Building a Talent Management Plan with a Diversity & Inclusion Focus: Five Key Steps	5
Mentoring	
What is mentoring? How does it contribute to diversity and inclusion?	8
Best practices	8
Benefits	9
Case Study	10-12
Key Recommendations	13
Onboarding	
What is onboarding? How does it contribute to diversity and inclusion?	14
Best practices	14
Benefits	14
Case Study	15-16
Key Recommendations	16
Succession Planning	
What is succession planning? How does it contribute to diversity and inclusion?	17
Best practices	17-18
Benefits	18
Case Study	19-20
Key Recommendations	20
Conclusion and Acknowledgements	21-22

EXECUTIVE SUMMARY

For organizations in the 21st century United States, diversity is a reality, a given, but effective engagement with diversity – often called Diversity and Inclusion – is an asset and a competitive advantage. Despite the economic downturn, organizations still find themselves in a war for top talent – and successful organizations do not stop with just attracting and hiring efforts, but utilize their resources to retain employees by providing a supportive environment. To maximize organizational success, employers don't just work to retain employees from diverse backgrounds; they also endeavor to leverage the diverse workforce to benefit from what these employees bring in terms of perspectives, including knowledge of diverse markets.

Employers – nonprofit, for profit and public – all stand to benefit from advancing diversity and inclusion as a strategy to remain competitive. Diversity brings a wealth of knowledge, skills and competencies which results in higher productivity and innovation. While there are numerous benefits of practicing diversity and inclusion, at the top of the list are increased morale among the workforce, and loyalty to the organization.

Lessons learned from research and practice in this area teach us that Diversity and Inclusion efforts will only show tangible results if this work is ingrained in the fabric of the organizational culture – a separate Diversity & Inclusion “initiative” is counterproductive.

While each organization's culture is unique, setting your own, equally unique, goal for an inclusive culture – what that looks like and how you will measure progress – is an imperative for real progress.

For national nonprofit human services employers, recent (2011) research, distilled from the panoply of diversity & inclusion practices in which to invest, suggests three that would offer the most value at the lowest cost. This toolkit is built on those recommendations, and offers readers best practices information and mini-cases from within our membership on these 3 areas of talent management and development work: Onboarding; Employee Mentoring; and Succession Planning.



“Diversity is any dimension that can be used to differentiate groups and people from one another. Inclusion is a state of being valued, respected, and supported. It is based on an organizational culture, management practices, and interpersonal relationships that support the full utilization of a diverse work force at all levels and in all functions of an organization.”(Giovannini, 2012)

In 2012, the need to build more diverse and inclusive organizations in the nonprofit human services sector is clear and compelling – our nation is increasingly diverse and grows more diverse every day, and that means our organizations need to mirror that diversity in terms of staff, board leadership, supporters and the constituents we serve and partner with to make positive change. Beyond these imperatives, there is a mountain of literature showing forcefully and with evidence that a diverse and inclusive workplace yields an organization that is more creative, more responsive, more agile and ultimately more innovative.

All that being said, the questions at hand are: how do we move from commitment to action and build the diverse and inclusive organization of the 21st century and – most importantly at this juncture – where should we start?

To understand the current state of Diversity & Inclusion efforts within our member organizations at the national level, in 2011 the National Human Services Assembly undertook a study, in conjunction with the NYU Wagner School of Public Service, to establish a baseline of information, findings and recommendations for moving forward. The research – conducted by a capstone team of graduate students with faculty supervision – focused on a rela-

tively narrow area of practice as a starting point – the efforts of NHSA members to increase the racial and ethnic diversity of senior management at their national headquarters.

The results of this Capstone research project, shared with members in 2011, provided recommendations for NHSA and our members as to specific practice areas that would be most fruitful for moving our Diversity & Inclusion work forward in the arena of Talent Management. The Capstone team’s literature review and interviews with key leaders outside as well as inside our sector pointed up three areas of practice where NHSA members were not as far along in their investments as they might be, but that are clearly high leverage points for increasing racial and ethnic diversity in senior management – and are also relatively low cost.

These three areas of practice – onboarding, employee mentoring programs and succession planning – are all areas where strong programs with an intentional Diversity & Inclusion lens can yield real results for our members as employers.

Upon considering the Capstone research findings, NHSA and its members, engaged through our HR and Diversity & Inclusion Councils, agreed that the next step in their collaborative work would be to be involved in the creation of a

toolkit on these three practice areas, featuring NHSA members who have already begun investment in these sorts of programs. NHSA engaged a graduate student intern to work on this product, and Council members participated in phone interviews and completion of questionnaires to help inform this product. NHSA’s intern Elma Jeyasekar also conducted extensive literature reviews inside and outside our sector, and utilized the NYU Capstone findings report as a guide and launching pad for this toolkit.

The materials that follow offer you a quick and accessible overview of key elements for building a successful Diversity & Inclusion approach to your organization’s talent management, followed by a closer look at how to build effective Onboarding, Mentoring and Succession Planning programs.

Source:

Giovannini M. *What Gets Measured Gets Done. Journal For Quality & Participation [serial online].* Winter2004 2004; 27(4):21-27. Available from: Academic Search Premier, Ipswich, MA. Accessed April 9, 2012.

BUILDING A TALENT MANAGEMENT PLAN WITH A DIVERSITY & INCLUSION FOCUS: FIVE KEY STEPS

To get started on either retooling or building a talent management approach that truly weaves diversity and inclusion into everything you do, researchers and expert practitioners suggest there are five key steps or building blocks. We offer key tactics and points to remember as you take each step – or as a checklist for double checking that the fundamental steps you’ve already taken incorporate lessons learned from your colleagues and the larger field.

Step 1: Planning

Warning – do not skip step 1! While it is tempting to start with action in a specific area, it is nearly impossible to demonstrate success – especially in an area that is so important and also remains relatively new and somewhat sensitive in terms of organizational commitment, investment and strategic initiatives – without beginning with the end in mind. While “low hanging fruit” is sometimes an effective way to get organizational change work started, in the case of Diversity & Inclusion efforts, it is wiser to invest in answering the following questions and ensuring that the following critical players and success factors are attended to before you launch any significant programmatic work.

Define Diversity – it is essential for your organization to define what sort of diversity your organization needs – Racial and Ethnic diversity? Age? Gender? Sexual orientation? Disability? Other dimensions?

Identify Options – what kinds of practices might you consider implementing, and what are the pros and cons of each? Which practices or efforts are most appropriate for your organization?

Identify Stakeholders – knowing your stakeholders helps you build a business case to engage them.

Align Goals – connect and tailor diversity goals and initiatives to overall organizational strategy mission, vision and goals.

Focus on Business Results – identify the rationale behind each diversity initiative. Why do you invest in this initiative? Does it benefit the organization, and if so, how?

Align Initiatives and Policies – the last thing you want is to have an initiative that is not in sync with organizational policies. Make sure that all organizational policies support the diversity mission.

Assess Current Position – know where you stand in diversity and inclusion efforts by gathering data and assessing the information gathered. Some of the questions you can ask yourself are: What do we plan to achieve? What have we achieved? What are some of the gaps which need to be addressed?

Know Your Employees – learn how employees in your organization value diversity and inclusion, and understand the existing diversified workforce through surveys or face-to-face meetings.

Update Employees – any initiative requires the involvement of employees to be successful. Create and utilize an effective communication plan to keep employees updated with the progress of any initiative undertaken.

Step 2: Set the tone

As you move from the planning stage into implementation, it is essential to create an environment which supports and aligns with your overall diversity plan. Creating an inclusive environment goes beyond providing a welcoming environment; the organization needs to value and utilize differences that diverse groups offer. While knowing and valuing differences is the first step, making efficient use of these differences is actually the crux of the matter. Below are some key steps for setting a tone of inclusiveness.

Create an Inclusive Climate – do you support your diversity mission by creating a climate of understanding, respect and acceptance for all?

Value and Utilize Differences – how differences are utilized, and the extent to which they are utilized to grow as an organization, contributes to demonstrating the organization’s commitment to diversity goals.

DiversityInc. (2012) *What Makes Kaiser Permanente Score With Employees, Customers?*. Retrieved from <http://diversityinc.com/diversity-management/what-makes-kaiser-permanente-no-1-for-diversity/>

Gregg, B. (2012). White employee wins racial discrimination lawsuit. *DiversityInc*, Winter 2012, 114-116.

Mor-Barak, M. E. (2005). *Managing diversity: Toward a globally inclusive workplace*. Thousand Oaks, Calif: Sage Publications

Plum Consulting, (2011). *Developing Executive Diversity in Human Service Organizations NYU Wagner Capstone Final Report Spring 2011*. Paper presented at the Talent Strategy 2.0, New York.

BUILDING A TALENT MANAGEMENT PLAN WITH A DIVERSITY & INCLUSION FOCUS: FIVE KEY STEPS

Encourage Ownership and Commitment – encourage ownership among stakeholders, and ensure that senior management is committed to and is supportive of the diversity mission.

Align Policies with Mission – ensure that the organizational policies and practices promote non-discrimination. There should be no biased treatment for any particular group of employees.

Address Needs – identify the needs of underrepresented groups and begin to address them.

Provide Developmental Opportunities – plan your training and development programs to support and help meet the diversity and inclusion goals.

Support Community Outreach and Involvement – encourage employee volunteerism by collaborating with and contributing to your community.

Build a Representative Workforce – "Action speaks louder than words" – demonstrate your commitment to diversity by attracting and building a representative workforce.

Involve Employees – ensure that employees are actively involved in these initiatives.

Step 3: Communicate

It's human nature to want to be

informed and included. Yet, many organizations who know the importance of communication fail to communicate with employees. As you review the action plan below, you may be surprised how small efforts like these can significantly contribute to meeting your goals.

Let Your Core Values Speak – list diversity and inclusion in the core values of the organization to show their central importance.

Craft Values and Other Position Statements Well – concise and clear communication helps minimize or eliminate unnecessary apprehensions and rumors, and builds internal alliances.

Highlight Goals and Progress – regularly emphasize the goals and progress of such initiatives through your communication efforts.

Initiate Intentional Dialogue – grab every opportunity to discuss inclusiveness and reflect on it.

Make Public Statements or Pledges – by going public you not only build your reputation, but a sense of accountability as well.

Embed Your Diversity Message Everywhere – the use of images of diverse employees and information about diversity in internal newsletters, websites, bulletins and other communicational tools can go a long way.

Your organizational website and intranet are a good place to get started. Elements to feature include:

- *Clear messages and commitment from top management*
- *Goals and progress*
- *Rewards and organizational successes associated with diversity and inclusion*
- *Publicly shared annual diversity report*
- *Video testimonials and success stories*
- *A page dedicated to Employee Resource groups*
- *Easy access and visibility to information on diversity practices* –(Jackson, 2012)

DiversityInc. (2012) *What Makes Kaiser Permanente Score With Employees, Customers?*. Retrieved from <http://diversityinc.com/diversity-management/what-makes-kaiser-permanente-no-1-for-diversity/>

Gregg, B.(2012). White employee wins racial discrimination lawsuit. *DiversityInc*, Winter 2012,114-116.

Jackson, C.C. (2012). Which companies have the best diversity websites? *DiversityInc*, Winter 2012,112.

Mor-Barak, M. E. (2005). *Managing diversity: Toward a globally inclusive workplace*. Thousand Oaks, Calif: Sage Publications

Plum Consulting, (2011). *Developing Executive Diversity in Human Service Organizations NYU Wagner Capstone Final Report Spring 2011*. Paper presented at the Talent Strategy 2.0, New York .

BUILDING A TALENT MANAGEMENT PLAN WITH A DIVERSITY & INCLUSION FOCUS: FIVE KEY STEPS

Step 4: Ensure accountability

Accountability is often equated with “showing numbers.” Although, it is important to show numbers, accountability goes beyond that. When accountability starts at the top and is employed at every level, the resulting commitment from employees proves to be a critical success factor which contributes greatly to meeting diversity goals. How do we ensure this sort of commitment? Let’s take a look.

Create an Accountability System – starting from top-level management to lower-level management, clearly specify each person’s responsibility.

Make Accountability Methods Easy to Use – work on a system that does not require major unnecessary changes in already existing systems (e.g. performance reviews, reports on business results).

Create Employee Resource Groups – these groups can lift up diversity throughout the organization and can help in making a business case for diversity.

Seek Expertise – Internal or External – do not hesitate to seek external support and advice.

Report Progress – create monthly, quarterly and annual reports and monitor the progress of the initiatives taken. Share these reports all the way up to the top management and the board of directors.

Step 5: Evaluate

Evaluation helps legitimize the value

of implementing any practice or process. It shows the importance that the organization places on the practice, and provides validation for the time, effort and other resources that are invested. Evaluation serves as a motivation for employees to put in their best. To quote management guru Peter Drucker, “What gets Measured Gets Done.” Below is a “to do list” for evaluating your diversity efforts.

Measure Diversity Outcomes – measure demographics in functional areas related to building a diverse workforce to identify areas of improvement; track successes and failures; and make necessary improvements.

Support with Evidence – use performance measurement and metrics to convey the business case for diversity.

Link Performance Reviews – connect employee’s contribution in these initiatives to performance reviews and variable components of compensation.

Conduct Benchmarking – evaluate organizational performance by benchmarking using labor force statistics, segmenting, conducting climate or cultural assessments. This will enable you to compare your performance to the market standard.



MENTORING

“Mentoring is a long-term relationship in which a more senior person offers general career guidance to a junior person. Coaching is when an expert or senior person is asked to help a person with one specific challenge. Sponsorship is when a senior person serves as a political advocate for the advancement of a junior person.”(Frankel, 2012)

With today’s workforce evolving to be more diverse, top organizations are adapting processes and practices which helps them to attract, hire, retain and develop a diversified workforce. Mentoring is one such practice which tops the list in terms of its impact. Mentoring promotes diversity by providing equal opportunity for every employee to grow professionally and by eliminating barriers to equity in opportunities for development. Mentoring helps identify high potential employees and ensures that they are provided with the right resources to progress professionally. We used a blend of research on theories and practices to come up with this list of best practices on mentoring for your consideration.

BEST PRACTICES TO BUILD AN EFFECTIVE MENTORING PROGRAM

Meet Expectations – mentoring programs are designed to meet employee needs. What do employees need? What programs are you offering them? Are there gaps in meeting their expectations? How do you plan to address the gap?

Link Performance Plan – connect your mentoring program to performance plans to encourage active participation.

Identify Desired Approach to Matching – what combination of mentors and mentee works best for

you – same dimension or different dimension; identify whichever proves beneficial for your organization.

Carefully Match Mentor and Mentee – a good match-up of mentor and mentee is highly recommended as it is important for the mentor and mentee to feel connected.

Provide Formal Guidance – a guidebook for mentors and mentees can serve as a reference, helping them to effectively facilitate their mentoring sessions.

Mentor Training – train the mentors on diversity practices of the organization.

Utilize Internal and External Resources – make efficient use of both internal and external mentors to widen the knowledge spectrum made available.

Practice Peer-to-Peer Mentoring – peer-to-peer mentoring is when employees of the same job-level mentor each other. Since mentees are mentored by their peer, they have no inhibitions as opposed to when a senior-level manager mentors his/her subordinate. This type of mentoring helps participants to be transparent around their vulnerabilities.

Encourage Reciprocal Mentoring – in reciprocal mentoring, mentor and mentee (senior mentoring junior

and vice versa) engage in a reverse/ mutual mentoring arrangement – resulting in both learning in the process and understanding the organization better through each other’s lens.

Train Mentors across “Silos” – when mentees from one part of the organization are mentored by leaders of another group both parties gain cross-functional knowledge.

Involve Top Management – make senior management a part of the mentoring program and hold them accountable.

Encourage Employee Participation – encourage employees to be a part of your mentoring program; top management support can improve active participation of employees in the program.

Evaluate Participation and Involvement – conduct employee surveys to evaluate the impact and value of employee involvement in the program.

Embed in Other Programs – inculcate mentoring in other, already existing leadership development programs and opportunities.

Frankel, B.(2012). Increasing diversity in talent development. *DiversityInc*, Winter 2012,74-75.

Frankel, B. (2012). How mentoring improves retention, engagement and promotions. *DiversityInc*, Winter 2012, 79.

SHRM. (N.D). *Creating a Strategic Diversity Management Plan: Onboarding*. Retrieved from http://www.shrm.org/hrdisciplines/Diversity/diversity_mgmt_plan/Pages/orientation.aspx

MENTORING

BENEFITS

- Improves employee engagement and motivation
- Nurtures professional development
- Increases internal promotion
- Promotes compensation growth
- Exposes senior management to talent available in the organization
- Gives an opportunity for employees to connect with the senior management at a different level
- Develops a sense of belonging and encourages greater ownership of organizational culture
- Facilitates transfer of knowledge
- Helps mentors and mentees understand the organization from a different perspective
- Improves productivity
- Decreases turnover rate. Acts as a retention strategy
- Promotes innovation and develops talent
- Accelerates employees' critical skills
- Reduces recruitment costs
- Develops new leaders



Frankel, B.(2012). How mentoring improves retention, engagement and promotions. *DiversityInc*, Winter 2012,78-87.

Plum Consulting, (2011). *Developing Executive Diversity in Human Service Organizations NYU Wagner Capstone Final Report Spring 2011*. Paper presented at the Talent Strategy 2.0, New York .

MENTORING

CASE STUDY: Boy Scouts of America – Scouting Ambassador Program

The Scouting Ambassador Program is Boy Scouts of America's employee mentoring program. Shortly after an employee is hired, he or she is assigned an ambassador who helps the new hire to transition into the organization. The Scouting Ambassador Program is more than just an initiative; it is linked with the organization's strategic plan. The program was started with a focus on building a diverse workforce; over the course of time, it has expanded beyond diversity and inclusion. The Chief Financial Officer is the sponsor of this program and holds the primary responsibility.

This program is open to all the employees of the organization. To be eligible to serve as a mentor or ambassador, an employee must be in good standing in terms of position, job responsibilities, performance, personality, passion for the organization and understanding the organizational culture. The selected ambassadors are reviewed and evaluated by a team/taskforce and trained for the program. Ambassadors are trained on how to "develop, nurture and retain" mentees by developing a strong mentoring relationship. Although Boy Scouts of America does not have any set targets regarding the diver-

sity of program participants, they ensure that the pool of participants is diverse in nature. Mentor – mentee matching is done based on the developmental need of the new hires – what skills and knowledge they have and need to develop, matched with ambassadors who have the competencies to develop these mentees in those areas. If a mentee prefers a cultural match – Boy Scouts of America ensures they are matched culturally as well. Ambassadors provide mentees with resources and help them make connections which will help them grow professionally.

Ambassadors are encouraged to take their mentees for lunches and mentees in turn are encouraged to spend time with their mentors to strengthen their mentor – mentee relationship and build a healthy and productive collaboration. Boy Scouts of America depends mainly on internal resources for this program; they employ external resources on an as-needed basis.

After 60 days of onboarding, staff conduct an evaluation to assess the effectiveness of the program, including the Ambassador's contribution, mentee participation, mentor-mentee match, learning and development, and the process. Following this initial evaluation, Boy Scouts of

America conducts a quarterly evaluation as well. One of the noteworthy aspects of the program is the annual celebration conducted to recognize and reward the contributions of ambassadors. This not only serves as a motivating factor for the participants but encourages other employees to learn more about the program and potentially be a part of the program in the future.

Successes:

Based on the evaluation which is conducted quarterly to assess the program, Boy Scouts of America's mentoring program has proved to be very successful. The two key benefits of this program are: employee engagement and retention. Since this program concentrates on addressing the developmental needs of the employees from their first day, they are able to transition into organizational culture with greater ease and continuously address areas that need improvement to contribute to both their growth and that of the organization. This helps employees gain a sense of belonging, commitment and satisfaction in working for the organization. The evaluation shows that the employees are more engaged after participating in the program than they were before the implementation of this program.

MENTORING

Research shows that through this mentoring program, both mentor and mentee have an extensive exchange of knowledge about each other, their responsibilities and concerns surrounding that, and organizational goals. The demographics of this program show the participants of the program are extremely diverse, and Boy Scouts of America staff believe this diversity is the backbone for the success of this program. Most importantly, this program has helped the organization to be seen as an employer who welcomes diversity of talent.

Challenges and Lessons Learned:

One of the key lessons learned is that the mentoring program, when tied to the performance goals of the organization, serves as an important motivating factor for the participants, as it validates the worth of the efforts that they put in. Currently the mentoring program is not linked to individual performance plans. But in the future, as the program evolves further, Boy Scouts of America plans to link the mentoring program to its performance goals.

Future Plans:

Like any process which needs to be improved continuously, BCS plans to fine tune the existing mentoring program to meet the needs of their

evolving workforce.

CASE STUDY: American Cancer Society – National Mentoring Program

American Cancer Society's national mentoring program was started in February 2010 involving around 50-100 participants in the first two years. Although it is a formal program sponsored by the national home office, ACS aims at setting an informal tone to the program, by describing it as a developmental opportunity offered to every employee of the organization, to encourage employee involvement. The focus of the program is to develop employees' skills in some of the core competencies identified as important organization-wide. Clearly, then, mentorship programs are not targeted on any specific group. The participant demographics are diverse – across gender, ethnicity, language, and race. The mentoring program has been well received by the employees of ACS; many VPs and senior-level management are actively involved in this program. At present, ACS runs this program solely using internal resources.

The process starts with senior leadership approving the cohort of mentors and mentees. Followed by approval from leadership, an orientation session is conducted through

webinar for all participants. The orientation covers topics related to goals, objectives, purpose and guidelines of the program. After attending the orientation, each participant completes an application through an external web-based platform, MentorScout, and creates a profile which includes details such as: demographic information, job title, job-level, tenure of service, primary areas of expertise, primary areas of development, desired role (mentor, mentee or both) etc. Thereafter, participants have access to a variety of useful mentoring-related resources.

A member of the ACS Talent Development team reviews all the profiles; based on the self-reported need and level of expertise, mentors and mentees are matched. Some of the other factors which are considered for the matching process include: job level, areas of interest and other specific requests. Mentees are usually matched with mentors whose positions are up to two job levels higher. Peer-to-peer mentoring and reciprocal mentoring are offered when there is a potential of achieving the desired focused learning through that particular type of pairing.

Altemus, C.C. Director, Employment and Diversity Office, Boy Scouts of America. Interviewed on May 1, 2012.

American Cancer Society. (2012). ACS National Mentor Program: overview, process and demographics. Atlanta, GA
Guzman, V. Senior Director-Diversity and Inclusion, [American Cancer Society](#). Interviewed on May 4, 2012.

MENTORING

A set of guidelines are provided for the participants to follow; these guidelines also set certain expectations. Mentors and mentees review a mentorship agreement which outlines preferred methods of communication, expectations, goals, confidentiality, and other relevant terms and conditions. In order to guide the mentors, ACS offers them an information session detailing the structure, support and skill development needed to mentor. Participants are offered training programs such as “Becoming the CEO of your development” to provide an opportunity to develop skills that are required to achieve higher performance. Special efforts are made to promote this program – for example, Regional Learning Consultants promote this program through discussions with key leaders across geographical divisions, by providing information sheets to interested stakeholders (e.g. top management, division heads, potential participants), and by sending e-newsletters to staff members.

Mentorship typically involves a minimum time commitment of 1 hour per month for approximately a year. However, there is no fixed time period for the completion of the program; the mentor or mentee have the option to end the mentorship when they determine that the

developmental needs have been met or in case of any other situation that makes continuing the mentorship difficult. They can also be re-matched with another mentor or mentee by request. After the first 6 months of the program, an employee satisfaction survey is conducted to evaluate the process and their overall experience.

Successes:

Qualitative data including surveys and independent feedback indicate that quality matches are made which result in “productive, effective and worthwhile” mentorship. Telephone based mentorship also proved to be both helpful and effective. The evaluation surveys indicate that 80% of the participants are either very satisfied or satisfied with the overall mentorship experience.

Mentees benefit through the development of specific skills, business acumen, growth in their professional network, and problem solving and decision-making skills. The mentoring program promotes employee engagement by offering more accessibility to resources available within the organization and allowing mentees to build a strong professional network. It serves as forum to encourage self-initiated discussions around areas mentees want to talk about – thus helping the staff to be

more self-directed and empowered. In the human resource perspective, the mentoring program helps in building experiences, and in making developmental plans, career plans and also in succession planning. The success of mentorships can largely be attributed to the highly committed and motivated participants.

Challenges and Lessons Learned:

ACS staff have observed that there is a change in the participant motivation and interest levels from initial inquiry to the time they are matched. This is partly due to the manual matching process which is time consuming and cumbersome – the interest level of participants declines when the matches are not made in a timely fashion. In addition, participants sometimes fail to provide enough details in their profiles making it difficult for the administrators to make an effective match, although the required matching criteria are specified. This proves to be a big barrier to offering a successful mentoring program. Staff also observe that some participants need more direction and support compared to others.

Future Plans:

The current mentoring program in ACS is, in effect, a pilot program. The first two years were focused on core locations; moving forward,

MENTORING

ACS plans to offer this program nationwide for staff members and some key volunteers, and to grow the size of the program. Staff hope to ultimately engage at least 7000-8000 people through the nationwide mentoring program. In order to build a strong tie between the mentoring program and inclusion, they are also planning to make it more customized and focused to specific opportunities identified to grow as a diverse workforce. ACS plans to conduct more pilot mentoring programs which include diversity components: race, ethnicity, career level, gender and a combination of these. They plan to develop a nationwide recognition program to recognize and reward the contributions of participants of the program. ACS continues to identify best practices that will allow for the continuous improvement of their mentoring program.

KEY RECOMMENDATIONS

Align with Organizational Goals – incorporate mentoring programs as an organizational plan and not just as a responsibility of individual managers.

Know the Purpose – view mentoring as retention strategy and plan your programs accordingly.

Define and Reiterate the Role of Management – mentors at the executive level need to do more by supporting broader efforts and initiatives at their organizations to help create the conditions that foster the upward mobility of people of color.

Encourage Sponsorship – it allows candidates from diverse background

to have an advocate within their organization.

Reflect Diversity Mission – ensure the pool of people being considered for promotions and key assignments reflect the diversity of the organization.

Conduct Focused Programs – promote executive development workshops and seminars that address diversity issues.

Show Your Support – support in house minority associations, including networking groups. Help colleagues manage their discomfort with race and other dimensions of difference and be alert for issues of bias disguised as legitimate concerns.

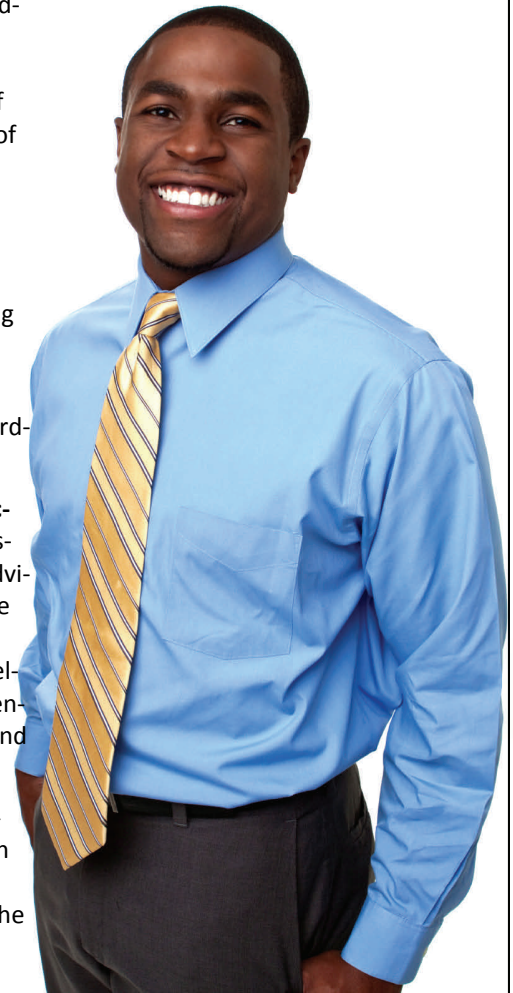
Conduct Assessments – engage in feasibility assessment and value-added assessment before engaging in a mentoring program.

Align with Relevant Processes – coordinate mentoring with onboarding practices.

Practice Effective Mentoring Processes – consider Private 1-to-1 sessions, establishing a Mentoring Advisory Board, and bringing in outside experts to conduct relevant workshops, check out online tools developed specifically for employee mentoring, offering learning content and connectivity.

Create a Forum – this will encourage open communication between mentors and mentees, and others may also benefit from observing the exchange of information.

Challenge Implicit Rules – challenge any assumptions surrounding the procedures of developmental programs; evaluate the effectiveness of each and every procedure as and when you practice.



ONBOARDING

"Onboarding is the process of acquiring, accommodating, assimilating, and accelerating new team members."(Bradt and Vonnegut, 2009)

Onboarding arguably provides the single best opportunity to advance diversity and inclusion initiatives across your organization, as it is a period when you can set a path for a new hire towards retention by showing your commitment to diversity and inclusion. By utilizing this opportunity to impart the organizations' values in the new hire rather than treating it as a process for completing paper work, organizations have turned onboarding into an important level for achieving strategic success. Onboarding contributes to diversity and inclusion primarily as a retention strategy. Given that it is not an easy task to recruit diverse talent, successful attraction should be complemented with strategies like onboarding to retain the talent pool acquired. Effective onboarding practices are especially important for a new hire from a diverse background in order for him or her to feel as a part of the organization. The list of practices below can help you ensure that your onboarding program contributes to your diversity mission.

BEST PRACTICES TO BUILD AN EFFECTIVE ONBOARDING PROGRAM

Align and Acquire – it's important to ensure that the key stakeholders involved in hiring for a position agree on the position description, role and level and approve of the hiring decision; though this may seem obvious, it's important to remember that the way a new hire

will be accepted by the stakeholders is determined even before the new hire even begins work.

Accommodate – from the outset, provide new hires with the necessary tools and resources for them to have the best opportunity to perform well. Hold leadership responsible for the development of new hires.

Assimilate – assign a mentor/sponsor/coach for new hires. Train the mentors on how to assist the new hires. You may also consider buddy programs and employee resource groups to help new hires to build relationships during their early days, weeks and months with the organization.

Accelerate – map the first hundred days of successful candidates. Onboarding does not stop with just the first week, but continues at least for a year. After identifying individual needs, provide new hires with training and other developmental opportunities throughout the year.

BENEFITS

- Employees feel welcomed
- Employees understand the culture of the organization
- Helps the new hires to fit in into the organization's culture sooner
- Provides a clear path for the new hires
- Employees gain lot of information about the organization, and their role and responsibilities
- Employees know who to connect with and where they can find resources they need
- Professional development starts early on
- Increases retention
- Increases employee satisfaction

ONBOARDING

CASE STUDY: National Industries for the Blind – Mission Possible Passport

At National Industries for the Blind, the onboarding process involves a series of clearly outlined steps – starting with the hiring manager identifying the need for a candidate up until the new employee's first day of employment. Onboarding is a part of the hiring process which is designed to help the new hires to transition into the organization in the most efficient manner possible. During their first week, new hires complete two half-day training sessions where they are provided with the tools and resources to facilitate their transition. Following the training sessions, NIB offers its own, one-of-a-kind program called the Mission Possible Passport. Mission Possible Passport is designed to aid in assimilation – through the program, new hires are required to meet the Leadership Team of NIB, including heads of departments and divisions, in order to complete the program within 8 weeks of starting their new job. Mission Possible Passport program simulates the “actual passport stamping process” wherein, when a foreign national enters a country, the country issues a stamp on their passport detailing their visit. Likewise, at NIB, the department heads attest the new hires' visit – the purpose of the visit is pre-defined like in the real scenario. The Passport program is designed to help them understand their roles and responsibilities, learn about the activities, programs and initiatives at NIB, and

to get to know the culture of NIB better. Once the Passport is complete, the HR department collects the passport document from new hires for review, to ensure that the program has been successfully completed. New hires that complete the program successfully are recognized at NIB's Town Hall meeting. New employees attend orientation meetings and tours with the umbrella organization of which NIB is a part – The US AbilityOne Commission – to learn about the purpose and process of the organization and how they are linked with each other. Although the HR team executes the onboarding process and is held accountable, other employees are actively involved in the process and contribute to the success of it.

Successes

The success of this process is measured by the feedback received from those undergoing the new employee activities. NIB considers its onboarding process a great success as it enables new employees to see the big picture of their program and to make a smooth and quick transition into the organization. Mission Possible Passport onboarding process focuses on involving many employees in the process and encourages feedback for continuous improvement of the system. This initiative has proven to be a great way to bring people from different backgrounds together to share their knowledge to progress as a team – and it contributes to building an

engaging workplace. In terms of looking at this onboarding process through a Diversity & Inclusion lens, NIB's program highlights the importance of working with people with disabilities and corrects common misconceptions. The activities are cost efficient and are considered by NIB's HR leadership to be absolutely worthwhile.

Challenges and Lessons Learned

Because NIB employs people from diverse backgrounds, the processes they develop by necessity embraces differences in ways that maximize both a positive culture and productivity. The onboarding process is designed in such a way that it prepares the new employees to work among and with people from different backgrounds and abilities by providing them with information that they need.

In terms of challenges, early on in implementing the onboarding process, there was a crossover from the existing onboarding system with the new system and was determined to be repetitive. This was resolved by combining the two programs into the Mission Possible Program. By streamlining the process, they were able to provide the most useful information without any redundancy.

Future Plans

NIB is in the process of expanding their onboarding process by introducing a lunch meeting called the “Lunch Bunch” similar to the model

Bryn, J. Workforce Development Program Director, National Industries for the Blind. Interviewed on April 4, 2012.

Kristen, M. Recruiting and Training Coordinator, National Industries for the Blind. Interviewed on April 4, 2012.

National Industries for the Blind. (N.D.). *Mission: Possible Secret Agent Passport The Great Land of NIB*. Alexandria, VA.

National Industries for the Blind. (2010). *NIB Quality Management System- Standard Operating Procedure: Recruiting & Hiring Process*. Alexandria, VA: Walling, A.

ONBOARDING

similar to the model of brown bag lunches where the new employees, HR and the Learning & Development team get an opportunity to follow-up after the formal orientation program. This, they believe would enhance the existing process by ensuring that the transition is successful over time.

Like any process, NIB consistently looks to improve the onboarding process. Employees from all levels are encouraged to give their feedback on the existing process and to offer suggestions for improvement to make the onboarding process more efficient.

KEY RECOMMENDATIONS

Benchmark Across Sectors – collect and share onboarding practices within and outside the human services and non-profit sector. Observe and adapt best onboarding practices from wherever they occur.

Identify Preconditions – develop an understanding of the conditions under which onboarding programs succeed.

Develop a Template for Your Onboarding Plan – a template serves as a foundation for any planning process; an onboarding template will help you organize your work so that it is easier to track and execute over time.



Bryn, J. Workforce Development Program Director, National Industries for the Blind. Interviewed on April 4, 2012.

Kristen, M. Recruiting and Training Coordinator, National Industries for the Blind. Interviewed on April 4, 2012.

National Industries for the Blind. (N.D.). *Mission: Possible Secret Agent Passport The Great Land of NIB*. Alexandria, VA.

National Industries for the Blind. (2010). *NIB Quality Management System- Standard Operating Procedure: Recruiting & Hiring Process*. Alexandria, VA: Walling, A.

SUCCESSION PLANNING

"Succession planning is a comprehensive, ongoing strategic process that provides for forecasting an organization's senior leadership needs; identifying and developing candidates who have the potential to be future leaders; and selecting individuals from among a diverse pool of qualified candidates to meet executive resource needs." (Gore, 2007)

Management writer, Wilf Altman, got right to the heart of the importance of this practice when he said, "Management succession planning means that there's a new generation of key talent and precise plans for continuity for when your big guns retire or your young go-getters get head-hunted."

Succession planning has traditionally been seen as synonymous with building a talent pipeline. In recent years, with the increasing value placed on diversity and inclusion, practitioners have inferred a vital link between succession planning and building a diverse workforce, although as yet this has not been demonstrated with empirical evidence. A well-formulated succession planning which incorporates the plan to build a diverse workforce provides strategic focus for the development of a diverse workforce. Diverse succession plan provides flexibility through its diverse talent pipeline to formulate, implement and operate new strategies which helps an organization grow in the diverse market.

By "planning" the succession of

diverse talent, an organization has the opportunity to ensure that its leadership will have the right talent in the right key roles, while at the same time, becoming more diverse.

Below are recommendations for how you can build, develop and advance a diverse workforce through your organization's succession plan.

BEST PRACTICES TO BUILD AN EFFECTIVE SUCCESSION PLAN

Make Long Term Plans – ensure that your efforts to align diversity with succession planning is not a short-term initiative but an ongoing process.

Integrate Strategies – it is important to align diversity strategies with the overall organizational strategies, specifically human resource strategies surrounding staffing, replacement planning, and workforce development. Integrating these strategies helps identify critical positions and formulate developmental plans for those positions.

Involve Top Management – involve management in the integration of diversity with succession planning.

Empower Employees – give

employees authority to contribute to the diversity mission by assigning them specific responsibilities, and hold them accountable for diverse succession goals.

Develop High Potentials – frame programs to focus on developing high potentials, rather than limiting yourself to broad efforts at developing a diverse workforce.

Be Clear about Your Talent Approach – succession planning that uses a diversity lens does not focus solely on a position-specific approach (replacing key executives). Rather, successful efforts seek out high potentials from throughout your talent pool in order to develop them as potential successors for multiple more senior positions.

Enhance Talent Pipeline – consider targeted recruitment or outreach programs to colleges and universities, with special emphasis on HBCUs, historically Hispanic institutions and other programs that educate students from underrepresented groups.

Evaluate Talent Management Practices – ensure that your talent management practices promote diversity and inclusion.

Emphasize Promoting from Within – give internally available diverse high potentials the first

Altman, W. W. (2009). Who's next in line? [management succession planning]. *Engineering & Technology* (17509637), 4(15), 72-75. doi:10.1049/et.2009.1516

Greer, C. R., & Virick, M. (2008). Diverse succession planning: Lessons from the industry leaders. *Human Resource Management*, 47(2), 351-367.

Gore, A. "Best practices in achieving diversity in the workplace" U.S. Department of Commerce and Vice President Al Gore's National Partnership for Reinventing Government Benchmarking Study. 2007. <http://govinfo.library.unt.edu/npr/library/workforce-diversity.pdf> Accessed 04/11/2012

SUCCESSION PLANNING

priority when found suitable for a position.

Allow Self-Nomination – allow employees to nominate themselves for promotion and development.

Evaluate Hiring Practices – for instance: consider measuring the percentage of employees who are hired through employee referrals, as referrals can be barriers to diversity – people tend to refer people like them, leading to replication of the same demographics.

Understand Existing Workforce – in addition to a focus on recruitment, make the effort to understand the existing diversified workforce already in the leadership pipeline and

provide the needed resources.

Avoid Bias – have an effective performance evaluation system in place to eliminate any sort of bias, and to focus on talent and its development within the organization.

Measure Contributions – link progress toward a diverse succession plan to performance evaluation and reward contributions through recognition programs.

Evaluate the Plan – evaluate diverse succession planning with multiple metrics such as retention, development, and advancement.

BENEFITS

- Helps to see beyond the current leadership
- Helps focus on internal staff development
- Pipelines can effectively be utilized to enable high potential talent to move across sectors
- Ensures long-term commitment and involvement of diverse employees
- Building talent pipelines improves the overall recruitment strategy
- Pipelines helps diverse employees move up to leadership roles



Altman, W. W. (2009). Who's next in line? [management succession planning]. *Engineering & Technology* (17509637), 4(15), 72-75. doi:10.1049/et.2009.1516

Greer, C. R., & Virick, M. (2008). Diverse succession planning: Lessons from the industry leaders. *Human Resource Management*, 47(2), 351-367.

Gore, A. "Best practices in achieving diversity in the workplace" U.S. Department of Commerce and Vice President Al Gore's National Partnership for Reinventing Government Benchmarking Study. 2007. <http://govinfo.library.unt.edu/npr/library/workforce-diversity.pdf> Accessed 04/11/2012

Plum Consulting, (2011). *Developing Executive Diversity in Human Service Organizations NYU Wagner Capstone Final Report Spring 2011*. Paper presented at the Talent Strategy 2.0, New York.

SUCCESSION PLANNING

CASE STUDY: Boys and Girls Clubs of America – Succession Planning

Recognizing the need for succession planning, the senior leadership with responsibility for HR at Boys and Girls Clubs of America (BGCA) sought funding to support a leadership development program to prepare high potential staff members for advanced leadership positions. After securing the funding in 2003, the Senior Management Team jointly selected 15 participants for the first offering of the two year program.

Based on existing leadership development programs in the for-profit and non-profit sectors, BGCA's leadership development program was designed to include a 360 assessment, group training events, individual development opportunities, senior leaders as mentors, action learning projects, and exposure to aspects of the organization not already associated with their positions. The group training events were defined by BGCA's leadership model; areas of focus for these trainings include executive leadership, project management, ethics and non-profit governance, presentation skills, strategic thinking and negotiation skills. Since 2003, 48 staff members have participated in the program creating leadership bench strength.

In 2007, BGCA's succession planning efforts were expanded to create specific candidate pools for specific leadership positions. Critical leadership positions for replacement planning and estimated date of possible

transition of the incumbent are identified. Senior Management Team members create their succession plans including identification of strengths, weaknesses and development activities for each candidate. The senior leaders are accountable for ensuring the development needs of their potential successors are met. Achievement and progress are tracked and regular updates are given to Human Resources and to the President.

The team has ensured that the respective roles and responsibilities of team members involved in the replacement process are specific and clear. The board works with the CEO to identify future CEO competencies based on future business strategy requirements, establish succession planning process, involve succession candidates in board activities, create a crisis succession plan, and to form a search committee. The board makes the ultimate decision in the selection of a CEO.

In terms of the board's role in identifying and selecting a successor for other Executive Positions, policy describes the board's role as to periodically review succession plan for critical leadership positions and provide input regarding appropriateness of talent for future business needs. The CEO's roles and responsibilities are also clearly delineated: his/her role in the replacement process is to determine timing of replacement/succession, identify skill sets needed for each critical SVP

position, share information on potential candidates with the Board, establish leadership development programs to build leadership bench strength, evaluate candidates regularly and share the evaluation with the Board.

The BGCA board holds the CEO accountable for succession planning and the CEO in turn holds the SVPs accountable for the development of staff members who are potential successors for their positions. Senior Management Team members' contribution to succession planning is evaluated during performance reviews.

Successes

The 5 year retention rate for the participants of the two year leadership development program is 77%. Participants also experienced increases in performance ratings after the program. The promotion rate of attendees is more than triple the promotion rate of the rest of the employee population.

Challenges and Lessons Learned

Identifying and developing external candidates is the biggest challenge in the current demand for talent. To add to that is the important task of identifying and planning the right move and assignment for the internal potential successors. Keeping high potentials engaged until the next move proves to be challenging as well.

SUCCESSION PLANNING

Future Plans

BGCA's continued organizational growth, in terms of size, scope, complexity, and resources, poses an additional mandate that a complete succession plan is in place, especially for the critical leadership positions. The task ahead is to ensure that there is a solid replacement/succession plan for each of these critical positions, and that the current and prospective senior leadership talent have the competencies to address present and future needs.

KEY RECOMMENDATIONS

Engage in a Thoughtful Succession Planning Process – focus your plans on diverse human capital in order to promote diversity.

Encourage Self-Assessment and Self-Nomination – encourage self-assessment for future management potential and allow professionals to nominate themselves for promotion and development.

Utilize a "Performance and Potential Matrix" (PPM) – performance and potential matrix/nine box is a tool used to assess talent in organizations. It assesses individuals on two dimensions – their past performance and their future potential. Assess and score talent in your organization using the PPM model. Consider including diversity as an additional component.



Dorsey, T. (2007). *Boys & Girls Clubs of America Succession Planning HR Council Meeting 2007* [PowerPoint slides].

Dorsey, T. Director, *Organizational Development, Boys & Girls Clubs of America*. Interviewed on March 5, 2012.

Plum Consulting, (2011). *Developing Executive Diversity in Human Service Organizations NYU Wagner Capstone Final Report Spring 2011*. Paper presented at the Talent Strategy 2.0, New York.

CONCLUSION

In today's increasingly global workplace environment, the importance of diversity cannot be over-emphasized. By building an organizational culture which embraces diversity and inclusion, you provide equal opportunity for every employee to grow professionally and to contribute to your organizational goals. Organizations achieve competitive advantage by practicing diversity; a diverse workforce fosters innovation, learning and productivity. Employees gain a stronger sense of belonging to the organization which amplifies their satisfaction, motivation and performance. In recent years, diversity has shifted from being viewed from an employee perspective to being viewed from a business perspective; having a strategic focus on developing a diverse workforce helps make good business sense. The main focus of this toolkit was to recommend some valuable best practices that increase the success of diverse organizations based on the research and theories. In addition to that, the toolkit includes real-time cases of member organizations which have been carrying out some diversity management practices in three areas of focus: mentoring, onboarding and succession planning which have proved to be successful. The toolkit serves as a foundation for our member organizations planning to undertake diversity goals, and as a catalyst for those member organizations who are already very engaged in

strategic diversity efforts.

It is important to understand that there is no single way to manage diversity – each organization should find out what works best for them, and design policies and programs accordingly. There is no end to improving existing diversity efforts, as there will always be areas for further development. Only by continuously refining the existing processes can an organization come up with a diversity plan which works best for them. As mission driven organizations, we need to strive everyday to earn ourselves an identity as organizations that welcome diverse talent, and embrace, value and utilize difference that a diverse workforce has to offer; there is no better way to reach out to diverse communities we serve than to have a representative workforce. To achieve our full potential, we need to go beyond including diversity in the organizational schema as a mission statement, an initiative, or a process and engrain it in the fabric of the organizational culture. And the journey continues – author Roosevelt Thomas sums it up best:

“Creating and managing a diverse workforce is a process, not a destination.”



ACKNOWLEDGEMENTS

TOOLKIT AUTHORS

- Karen Key, *Vice President for Programs*, National Human Services Assembly
- Elma Jeyasekar, *HR Intern*, National Human Services Assembly

ACKNOWLEDGEMENTS

Our sincere thanks to the graduate students from NYU Wagner School – Adam Drucker, Mary Beth Gonzales, Selena Juneau-Vogel, Monisha Makhijani and Michael Turi – for conducting the Capstone research; their research findings and recommendations served as the foundation for this toolkit.

We are very grateful to Michael Watson, (*Senior Vice President, Human Resources and Diversity*, Girl Scouts of the USA), and Denise Truvillion, (*Project Manager, Human Resources & Diversity, Girl Scouts of the USA*) for providing constant support and guidance throughout the development of the toolkit. Thanks also to Debbie Foster (*Executive Vice President and Chief Diversity Officer*, United Way Worldwide), for her leadership as Chair of our Diversity & Inclusion Council.

A special thanks to the Talent 2.0 Taskgroup – Ann Walling (*Human Resources Manager*, National Industries for the Blind), Evelyn Amador (*Vice President-Human Resources*, United Way Worldwide), Jack

Tootson (*Director of Learning and Development*, National Industries for the Blind), Jason Bryn (*Workforce Development Program Director*, National Industries for the Blind), Kristen Maines (*Recruiting and Training Coordinator*, National Industries for the Blind), and Terri Dorsey (*Director-Organizational Development*, Boys & Girls Clubs of America) – for their advice, expertise and substantial contribution for the development of the toolkit.

We appreciate the time and efforts taken by all the interview participants – Carolyn Altemus (*Director-Diversity & Executive Recruiting*, Boy Scouts of America), Davis Parker (*Executive Communications Associate*, National Youth Leadership Council), Evelyn Amador (*VP-Human Resources*, United Way Worldwide), Jason Bryn (*Workforce Development Program Director*, National Industries for the Blind), Kristen Maines (*Recruiting and Training Coordinator*, National Industries for the Blind), Terri Dorsey (*Director-Organizational Development*, Boys & Girls Clubs of America), and Vivian Guzman (*Senior Director-Diversity and Inclusion*, American Cancer Society); and we would also like to thank all the survey participants for their active participation and involvement in this initiative.

We are grateful to Samuel Britton (*Program Manager*, National Human

Services Assembly) for helping us with the toolkit design and layout, and for converting the rough draft into a finished product.

We thank Willa Jackson (*Office Manager*, National Human Services Assembly) and Bruce Bernier (*IT Consultant*, National Human Services Assembly) for providing timely information assistance.

Once again, we wish to thank all who contributed to the development of this toolkit. This toolkit could not have been possible without your knowledge, expertise, time and efforts.

*Prepared by the National Human Services Assembly, www.nationalassembly.org. May be cited with attribution.