



Example of Climate Assessment Process Outline **(All Segments Optional Depending Upon Need)**

Step #1

A.

Meeting With Diversity Strategy Team (Including Key HR Partners, Executives, Managers & Employees from other Functions, Sites or Levels, etc.) & Our Consulting Team

The purpose of this meeting would be to:

1. Clarify and assure commonality of expectations and direction.
2. Clarify the partnering functions and relationships of the external consulting team, the internal client Team, and other stakeholders.
3. Help establish and support an ongoing relationship of openness, trust and communication among the parties throughout this process.
4. Serve as a support and Focus Group in which members can confidentially and openly share experiences, observations, concerns, strengths, and systems and climate issues at work that can help identify specific as well as common patterns of Diversity-related strengths and areas in need of improvement, and generate recommendation for subsequent action consideration.

**Leveraging Diversity to Advance
Individual and Organizational Excellence**

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B.
Collection, Review & Analysis of Relevant Materials

The purpose of this collection and review of Diversity-related documents and materials is to more clearly understand the past and current Diversity practices, policies and climate at the organization. Such material may include, but not necessarily be limited to:

- ◆ performance management systems & processes
- ◆ worklife policies and practices
- ◆ recruitment policies and practices
- ◆ discipline patterns
- ◆ succession planning
- ◆ promotion patterns
- ◆ promotion criteria
- ◆ records of internal, diversity-related communications (i.e., exit interviews, complaints or grievances, memos, etc.)
- ◆ annual reports
- ◆ EEO/Affirmative Action policies, practices, statistics & patterns
- ◆ management & supervisory competency standards including measurement, evaluation, rewards, & sanctions policies
- ◆ Grievance patterns
- ◆ Law suits
- ◆ Other additional relevant materials (i.e., mission statements, objectives, programs, activities) that could be helpful in framing a clear and comprehensive understanding of past and current Diversity patterns, priorities and philosophies.
- ◆ internal and competitive diversity marketing data

C.
One-on-One Individual Interviews

One-on-one individual interviews would be with client employees selected from a “Z-slice” of professionals representing diverse organizational levels, job functions, job sites and diverse demographic backgrounds.

The purpose of these interviews is to solicit experiences, observations, insights and suggestions that can help identify specific as well as common patterns of the organization’s Diversity strengths and areas in need of improvement, and to generate Action Recommendations.

D.

Remote Web-Based Or Keypad Employee Survey

Whether through a password process across the multiple locations at the organization or by convening groups of as many as 50 employees per session using consultant-provided wireless, voting keypads, a sequential series of 10-20 questions involving a 6 point *agree* or *disagree* scale would be flashed on the screen. Clear explanations to participants will emphasize both how this technology assures anonymity and confidentiality, as well as the Best Practices Business purpose of this process.

E.

Post-Data Collection, Organization, Review, Analysis & Write-Up of Client-Identified Diversity Strengths & Areas in Need of Improvement

In addition to the collection and analysis of client provided documents and materials and 1-on-1 interviews, the web-based or key pad survey data would be in both aggregate and disaggregate form so that response patters of similarities and differences can be identified and strengths, weaknesses and gaps can be determined across categories such as site, job level, race, gender, national origin, & longevity, etc.

Step #2

Follow-Up Reporting, Discussion & Planning Meeting with DiversiTeam & the Client's Diversity Leadership Team

The client Diversity Leadership Team would meet with the Tulin DiversiTeam Associates group, at which time the assessment write-up conclusions would be reviewed, discussed, & analyzed, with specific focus on using these learnings to develop and/or advance a Strategic Diversity Action Plan that utilizes the assessment learnings as a guideline in crafting systemic action plans in areas including those identified by the Conference Board as Key Corporate Diversity Best Practices, such as: **Communication, Education & Training, Employee Involvement, Career Development & Planning, Leadership Performance & Accountability, Employee Performance & Accountability, Domestic Niche and Global Diversity Market Opportunities; Customer Loyalty and Service Excellence, Culture/Work Climate Change, Recruitment & Retention, and External Relationships.**

The results of this Diversity Assessment can be utilized as a rich resource during the strategic change process, and can be also serve as a potential benchmark by re-administering the survey to determine whether gaps have been narrowed and measurable progress achieved.