

SENIOR LEADERS



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SELECT EMPLOYEES



HUMAN RESOURCES



TALENT MANAGERS



ALL EMPLOYEES



CASCADING GENDER BIASES, COMPOUNDING EFFECTS:

An Assessment of Talent Management Systems

About Catalyst

Founded in 1962, Catalyst is the leading nonprofit membership organization working globally with businesses and the professions to build inclusive workplaces and expand opportunities for women and business. With offices in the United States, Canada, and Europe, and more than 400 preeminent corporations as members, Catalyst is the trusted resource for research, information, and advice about women at work. Catalyst annually honors exemplary organizational initiatives that promote women's advancement with the Catalyst Award.

CASCADING GENDER BIASES, COMPOUNDING EFFECTS:

An Assessment of Talent Management Systems

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FOREWORD

LEVERAGING TALENT FROM TOP TO BOTTOM

Chief executive officers rank their concern with managing talent and tackling the shortage of executive talent above their concerns for global competition and innovation.¹ To effectively address this concern, CEOs must thoroughly understand how poorly executed talent management systems can inadvertently contribute to talent shortages and gender gaps in advancement rates.

When companies implement practices that unintentionally dilute their talent pool, everyone pays a price—job satisfaction decreases, employee turnover increases, financial performance suffers, promotion opportunities are missed, and, ultimately, businesses become less successful.² It is critical that companies recognize potential vulnerabilities

in their talent management systems. Research on talent management infrastructures will provide insights into how companies can reduce gender gaps in leadership, tackle talent shortages, and leverage diverse talent. Such research is sparse.

To determine potential vulnerabilities in talent management systems, Catalyst collected data from 110 corporations and firms representing 19 different industries. We interviewed 30 talent management experts and architects from 24 companies, and we examined documents from many companies that completed the interviews. We then fielded an online survey that was completed by 86 corporations and firms.³

1. Kevin S. Groves, "Integrating Leadership Development and Succession Planning Best Practices," *Journal of Management Development*, vol. 26, no. 3 (2007): p. 239-260; Steve Krupp and William A. Pasmore, "Talent at the Top: The CEO's Focus," *Viewpoint: The MMC Journal* (2007), <http://www.marshmac.com/knowledgecenter/viewpoint/Krupp2007.php>.

2. Kevin S. Groves, "Leader Emotional Expressivity, Visionary Leadership, and Organizational Change," *Leadership & Organization Development Journal*, vol. 27, no. 7 (2006): p. 566-583; Groves (2007), p. 244; Karen S. Lyness and Madeline E. Heilman, "When Fit is Fundamental: Performance Evaluations and Promotions of Upper-Level Female and Male Managers," *Journal of Applied Psychology*, vol. 91, no. 4 (2006): p. 777-785.

3. Appendix 1 describes the participating companies, interview respondents, research questions, and the data analyses conducted.

SENIOR
LEADERS



FUTURE
LEADERS



SELECT
EMPLOYEES



CHAPTER 1
INTRODUCTION

HUMAN
RESOURCES



TALENT
MANAGERS



ALL
EMPLOYEES



LEADERSHIP DEVELOPMENT AND GENDER BIAS

Organizations of all sizes and industries face a range of leadership development challenges that can reduce the effectiveness of mid-management levels, rob high-potential employees of critical work experience, and deplete resources for employee development. Among these challenges, two stand out:

- A narrow image of what talent looks like in terms of gender, race, ethnicity, age, and sexual orientation.
- The shortfall of experienced managerial talent for senior leadership positions.⁴

Rapid changes in aging workforces around the world and scientific and technological advances often outpace the education and abilities of qualified workers,⁵ further compounding concerns associated with managing talent and developing leaders.

Companies cannot control many of these changes in workforces, but losing talent due to gender inequities is a challenge that organizations can confront proactively and head-on. To do so, they must recognize how embedded biases in their own talent management practices may support barriers to women's development and advancement. Only then can organizations begin to address the uneven playing field and build a system that values *all* its employees.

There is growing evidence that gender bias⁶ in the workplace negatively affects advancement opportunities for women, contributes to gender gaps at executive levels, and limits strategies for leveraging talent.⁷ Prior Catalyst research has shown the widespread existence of gender

stereotypes⁸ in the United States and Western Europe.⁹ Specifically, women and men were shown to perceive “taking care” behaviors as the defining qualities of women leaders and “taking charge” behaviors as the defining qualities of men leaders. Gender stereotyping was shown to contribute to three specific predicaments¹⁰ that inhibit women's advancement and put women in a double-bind.

In addition, a recent Catalyst and Families and Work Institute study of nearly 8,000 leaders from organizations around the world found that:¹¹

- Senior leaders and men leaders were advantaged by a better match between their values and the characteristics of their positions and workplaces.
- Workplace engagement was strongly related to alignment between values and workplace realities for both women and men.

These studies have shown that gender stereotyping influenced perceptions of leadership competencies and that differences between workplace characteristics and employee values created more disadvantages for women than men. In this study, we extend these findings and examine how talent management systems can reinforce and perpetuate bias that favors men over women.

HOW BIAS IS INTRODUCED INTO TALENT MANAGEMENT SYSTEMS

Since every employee has his or her own set of views, processes, preferences, and assumptions, it's not necessarily a surprise to find gender biases in talent management. However, as the following chapters reveal, while all stakeholder groups play a significant role in the cycle, senior leadership teams benefit the most from talent management procedures and programs.

4. Groves (2007), p. 239-240.

5. Emily V. Troiano, *Workplace Trends: Today's Decisions, Tomorrow's Successes* (Catalyst, 2008).

6. Bias refers to preference toward a particular perspective, ideology, or result. Gender bias refers to preferring or favoring one sex over the other. Pro-male bias is a form of gender bias that prefers or prioritizes stereotypically masculine characteristics and behaviors over stereotypically feminine characteristics and behaviors.

7. Dean Elmuti, Judith Lehman, Brandon Harmon, Xiaoyan Lu, Andrea Pape, Ren Zhang, and Terad Zimmerle, “Inequality Between Genders in the Executive Suite in Corporate America: Moral and Ethical Issues,” *Equal Opportunities International*, vol. 22, no. 8 (2003): p. 4.

8. Gender stereotypes refer to generalizations and preconceived notions about how women and men differ based on our perceptions of how women and men “should” or “ought to” behave in various situations. Stereotypes are the result of socialization messages that individuals receive in the organizational, social, cultural, and familial environments that surround them.

9. Catalyst, *Women “Take Care,” Men “Take Charge:” Stereotyping of U.S. Business Leaders Exposed* (2005); Catalyst, *Different Cultures, Similar Perceptions: Stereotyping of Western European Business Leaders* (2006).

10. According to this research, women leaders face three specific predicaments: 1) Extreme perceptions: Too soft, too tough, and never just right; 2) The high competence threshold: Women leaders face higher standards and lower rewards than men leaders; and 3) Competent but disliked: Women leaders are perceived as competent or likeable, but rarely both. See Catalyst, *The Double-Bind Dilemma for Women in Leadership: Damned if You Do, Doomed if You Don't* (2007).

11. Ellen Galinsky, Nancy Carter, and James T. Bond, *Leaders in a Global Economy: Finding the Fit for Top Talent* (Families and Work Institute and Catalyst, 2008).

In order to understand the vulnerability of talent management systems¹² to bias, we must first identify the various stakeholders involved in the process.¹³ For this exploratory report, we used qualitative and quantitative findings to develop this understanding.

At first glance, the stakeholders appear to be human resources (HR) personnel and the employees tasked by HR with implementing the system. However, as depicted in Figure 1, HR teams and talent managers actually serve as intermediaries between senior leadership teams and employees, which makes everyone a stakeholder in talent management.

Figure 1 also illustrates the flow of information through talent management systems and highlights who benefits most from talent management systems and who risks being left behind:

- Senior leadership teams set the tone by determining strategies, policies, goals, and objectives for the company and, indirectly, for all employees.
- HR departments translate senior leaders' strategies, policies, goals, and objectives into performance management goals that drive talent management, promotion, and succession processes.

- Talent managers and HR departments team up with other stakeholders (select managers and employees) to develop a range of talent management and performance review processes and programs based on directions from executives.
- Managers and supervisors use processes and tools provided by HR to evaluate the performance of individual employees and make decisions about opportunities for advancement and development.
- All employees participate in the talent management system through the evaluation/review process, and some are tapped as “high-potentials” to garner special career advancement and development opportunities.

It is critical to the success of any talent management system to recognize the contributions of each of the groups to the process and to understand the way their actions and proclivities can introduce bias into the system.

12. The term talent management system refers to how organizations develop their employees to create competitive advantages that improve business performance and increase the bottom line. Talent management includes human resources functions such as performance management, succession planning, competency management, career development, systems integration, and leadership development. See Mike Bourne, Monica Franco, and John Wilkes, “Corporate Performance Management,” *Measuring Business Excellence*, vol. 7, no. 3 (2003): p. 15-21; Plateau Systems, “Talent Management: The Critical Performance/Learning Link” in *Best Practices in Talent Management*, <http://www.internshipinstitute.org/pdf/Talent%20Mgmt%20Best%20Practices.pdf>

13. In this report, stakeholders represent all members of a company, since, in theory, all employees receive an evaluation of their work and opportunities for promotion. Stakeholder groups will refer to four different groups: senior leaders, human resources, talent managers, and employees.

FIGURE 1
The Vicious Cycle



REPORT AT A GLANCE

In this study, Catalyst undertook the following steps to investigate potential vulnerabilities to gender bias in talent management and the resulting effects on gender gaps in senior leadership:

1. Examined the talent management process as a whole and determined how the parts interact.
2. Identified and assessed the presence of bias in the talent management systems.
3. Explored the opportunities for gaps to arise between the design of a talent management process and its execution.

We found that core components of talent management are linked in ways that disadvantage women, creating a vicious cycle in which men continually dominate executive positions:

- **The senior leadership effect.** While all employees play a role in the effectiveness of talent management, senior leadership teams have a significant effect on talent management programs and practices, as well as leadership competencies and criteria. This ultimately affects who gets promoted.
- **Institutionalizing bias.** Most participating organizations described their talent management system as formalized, customized, and centralized. Still, analyses revealed that many companies and industries fell short when it came to implementing appropriate checks and balances that minimize gender biases and level the playing field for women and men.¹⁴
- **Compounding bias.** Gaps between the design and execution of talent management programs compound the disadvantages faced by women, especially those seeking professional development and advancement.

Overall, data revealed that the pervasive effect of senior leaders on the talent management process can yield new senior leaders who mirror the traits and biases of the senior leadership team that promoted them. While HR departments and talent managers across each organization are responsible for many aspects of talent management, we found that gender bias in tools and procedures can inhibit the establishment of inclusive and effective talent management programs. When organizations fail to integrate checks and balances that guard against the introduction of gender bias into their talent management systems, they open the process to the negative effects of gender stereotyping and hinder opportunities for women's advancement, especially women in male-dominated positions and industries.¹⁵

14. Later in this report, we will provide recommendations and showcase practices that have minimized gender gaps and biases by implementing checks and balances.

15. Cara C. Bauer and Boris B. Baltes, "Reducing the Effects of Gender Stereotypes on Performance Evaluations," *Sex Roles*; vol. 47, no. 9/10 (November 2002): p. 465-476; Lyness and Heilman, p. 782-784.

OVERVIEW OF PARTICIPATING ORGANIZATIONS

Phase 1: Qualitative Interviews

In-depth interviews using a semi-structured protocol were conducted with 30 talent management experts and architects. Interviewees represented 24 of the 110 participating companies. Most (83 percent) interviewees helped develop the talent management systems at their organization, and most were headquartered in the United States.

Of the 30 interview participants, 60 percent were women, and 40 percent were men; 10 percent were people of color, and 90 percent were white. To ensure a diverse sample of industries, we identified top companies across multiple industries based on *Fortune* 500 rankings and top company lists. We used a high-touch approach of calling and emailing three to five companies in each industry (response rate=39 percent). Respondents were asked about gender stereotypes, performance management, career advancement, and talent development systems.

Phase 2: Talent Management Document Review

Several hundred pages of talent management forms, tools, models, and other materials were collected from companies that participated in the in-depth interviews. We examined the documents to verify interview responses and identify the potential presence of gender stereotypic content. Most companies self-selected the forms and tools they provided but, in some cases, Catalyst used Internet searches to collect additional data on participating corporations and firms (e.g., corporate values, diversity statements, leadership team overviews).

Phase 3: Online Survey¹⁶

Eighty-six corporations and firms completed an online checklist survey (response rate=20 percent). Fifty-nine percent were multinational and 23 percent were national in reach. Sixty-four percent were headquartered in the United States, 13 percent in Canada, 6 percent in Europe, and 1 percent in Asia. Of the 86 survey respondents, 62 percent were women, 20 percent were men, and the remaining respondents did not identify their gender. Thirty-five percent of respondents were people of color, 48 percent were white, and 17 percent did not self-identify. The majority of survey respondents worked in Human Resources or Diversity/Inclusion (73 percent), and the remaining were identified as key contributors to their organization's talent management system, but worked in different lines of business.

16. Some participating companies did not provide demographic information and could not be included in the overview of online participants.

CHAPTER 2

CASCADING BIASES:

It All Starts With Senior Leaders



CHAPTER AT A GLANCE

- Senior leadership teams have a significant effect on talent management as tone from the top cascades down.
- Talent management systems more commonly include masculine stereotypes when characterizing senior leaders, suggesting that masculine norms are embedded in the system.
- Senior leaders' involvement with important assignments can disadvantage women when bias about competencies influences decision-making.

THE SENIOR LEADERSHIP EFFECT

Senior management teams set the tone for their organizations and often determine who gets access to valued resources. Tone from the top is communicated in myriad ways, from establishing strategic goals and objectives to initiating policies and programs that support the organization's culture. As these “cascade” downward through the organization, they signal to employees the norms of the senior leadership team—what is valued and rewarded—and shape goals, objectives, and behaviors on an individual level.¹⁷ Senior leaders assume that cascading creates a corporate culture in which all employees understand how their day-to-day work impacts the company as a whole.¹⁸

When senior leadership teams are diverse (e.g., they include men, women, a variety of age, racial, and ethnic groups, and individuals with a range of professional experiences), the norms that cascade down are likely to be wide-ranging, balanced, and more comprehensive. Alternatively, when any one demographic group predominates at the top, the system is much more vulnerable to an exclusionary perspective that reflects the values of that group alone. In most parts of the world, this favors men because they predominate senior leadership teams. In the United States, men hold more than 84 percent of corporate officer positions at top companies.¹⁹

The risks to organizations are multiple. Biases or preferred behaviors resulting from inadequate representation trickle down from senior leadership

levels and are codified and promulgated throughout the organization through talent management tools and procedures. Also, because men predominate senior leadership teams globally, the “think-manager-think-male” perspective becomes the standard employees come to expect. As a result, employees are apt to substitute masculine stereotypes for more nuanced and accurate interpretations of senior leaders' values and norms. Such stereotypes undermine the success of women, challenge the effectiveness of their leadership, and diminish their ability to receive performance evaluations, promotions, and compensation packages that are equitable to men.

The Think-Manager-Think-Male perspective refers to how perceptions of leadership are stereotypically masculine—as either predominantly associated with men (higher percentages of men than women in leadership positions) or with task-oriented traits (perceptions of men as “doers” and action-oriented).²⁰ Researchers have found that stereotypes often leave women in a double-bind where their behaviors and characteristics are either defined as too feminine or too masculine.²¹ Catalyst has also found that women who try to conform to traditional—that is, masculine—leadership behaviors are damned if they do, doomed if they don't.

In-depth interviews with talent management experts and architects revealed that top-down cascading of attitudes was a common and far-reaching practice in organizations and industries.

17. Cascading generally occurs annually and is based on collaborative discussions among senior leaders.

18. Bourne et al., p. 15-21; Plateau Systems, “Talent Management: The Critical Performance/Learning Link” in *Best Practices in Talent Management*, <http://www.internshipinstitute.org/pdf/Talent%20Mgmt%20Best%20Practices.pdf>.

19. Catalyst, *2008 Catalyst Census of Women Corporate Officers and Top Earners of the Fortune 500* (2008).

20. Sabine Sczesny, “A Closer Look Beneath the Surface: Various Facets of the Think-Manager-Think-Male Stereotype,” *Sex Roles*, vol. 49, no. 7/8 (October 2003): p. 353-363.

21. Through extensive research on gender differences and similarities, we learned that women and men are actually more similar than different and that there is more variation within each group (women and men) than there is between women and men. See, for example, Janet S. Hyde, “The Gender Similarity Hypothesis,” *American Psychologist*, vol. 60, no. 6 (September 2005): p. 581-592; Elisabeth Aries, *Men and Women in Interaction: Reconsidering the Differences* (New York: Oxford University Press, 1996); Catalyst, *The Double-Bind Dilemma for Women in Leadership: Damned if You Do, Doomed if You Don't* (2007).

The CEO's three strategic themes are still nebulous to a lot of people, but [employees] are starting to understand [them] now because [they are] being used in different contexts and repeated. We think that if we can get people to behave in a way that is consistent with the leadership model, then we are going to get people to behave in ways that are consistent with strategic imperatives, because they all link together nicely.

—Woman, Mid-level manager,
Multinational financial services

We are trying to get into cascading goals so that [employee] goals are linked and tied to contributions and to results. We try to ensure that goals and objectives are aligned to the bigger picture. We have something to describe what employees need as core competencies for particular levels.

—Man, Mid-level manager,
Multinational consumer products

We want employees to know that they are building a cathedral and not just a six-foot statue because they didn't get the big picture. We now call it a business execution tool and not an HR process.

—Woman, Mid-level manager,
Industrial/Materials

BIASED PERCEPTIONS IN LEADERSHIP ATTRIBUTES

The risk of introducing gender bias into talent management systems is nowhere more obvious than in what leadership competencies are valued and expected.

Rarely do organizations explicitly state what it takes to get promoted and be a leader, which leaves employees looking to senior leaders for cues. Most businesses have male-dominated senior leadership teams, which makes masculine norms more likely to be conveyed. Not surprisingly, employees in most organizations perceive the masculine leadership traits being displayed as those most valued in the organization. Furthermore, Catalyst research shows that when left to their own interpretations, women and men leaders in the United States and Europe resorted to gender stereotypes to define characteristics of effective leaders.²²

Do these stereotypes creep into talent management systems? To gain insight, we asked experts we interviewed to describe leadership competencies. We also asked them to describe three other competencies that we identified as critical to performance appraisal, project assignments, and promotions:²³

- Technical/analytical skills
- Administrative skills
- Interpersonal skills

When it came to leadership competencies, in-depth interview respondents provided more than 50 descriptors. We used the most frequently cited characteristics along with characteristics from prior Catalyst research to construct online survey items about leadership competencies.²⁴

Results from the survey, depicted in Figure 2, confirm that the majority of talent managers evaluated their senior executives as primarily displaying stereotypically masculine characteristics and competencies.²⁵ The three most popular characteristics were all stereotypically masculine.²⁶ Conversely, the top stereotypically feminine characteristic was indicated by less than one-half of the talent managers and teams that completed the online survey.

22. Catalyst, *Women "Take Care," Men "Take Charge": Stereotyping of U.S. Business Leaders Exposed* (2005); Catalyst, *Different Cultures, Similar Perceptions: Stereotyping of Western European Business Leaders* (2006).

23. Some participating organizations have employees specifically tasked to assign projects. Paul Sandwith, "A Hierarchy of Management Training Requirements: The Competency Domain Model," *Public Personnel Management*, vol. 22, no. 1 (Spring 1993): p. 43-62; Peerasit Patanakul, Dragan Z. Milosevic, and Timothy R. Anderson, "Criteria for Project Assignments in Multiple-Project Environments," *Proceedings of the 37th Hawaii International Conference on System Sciences* (2004).

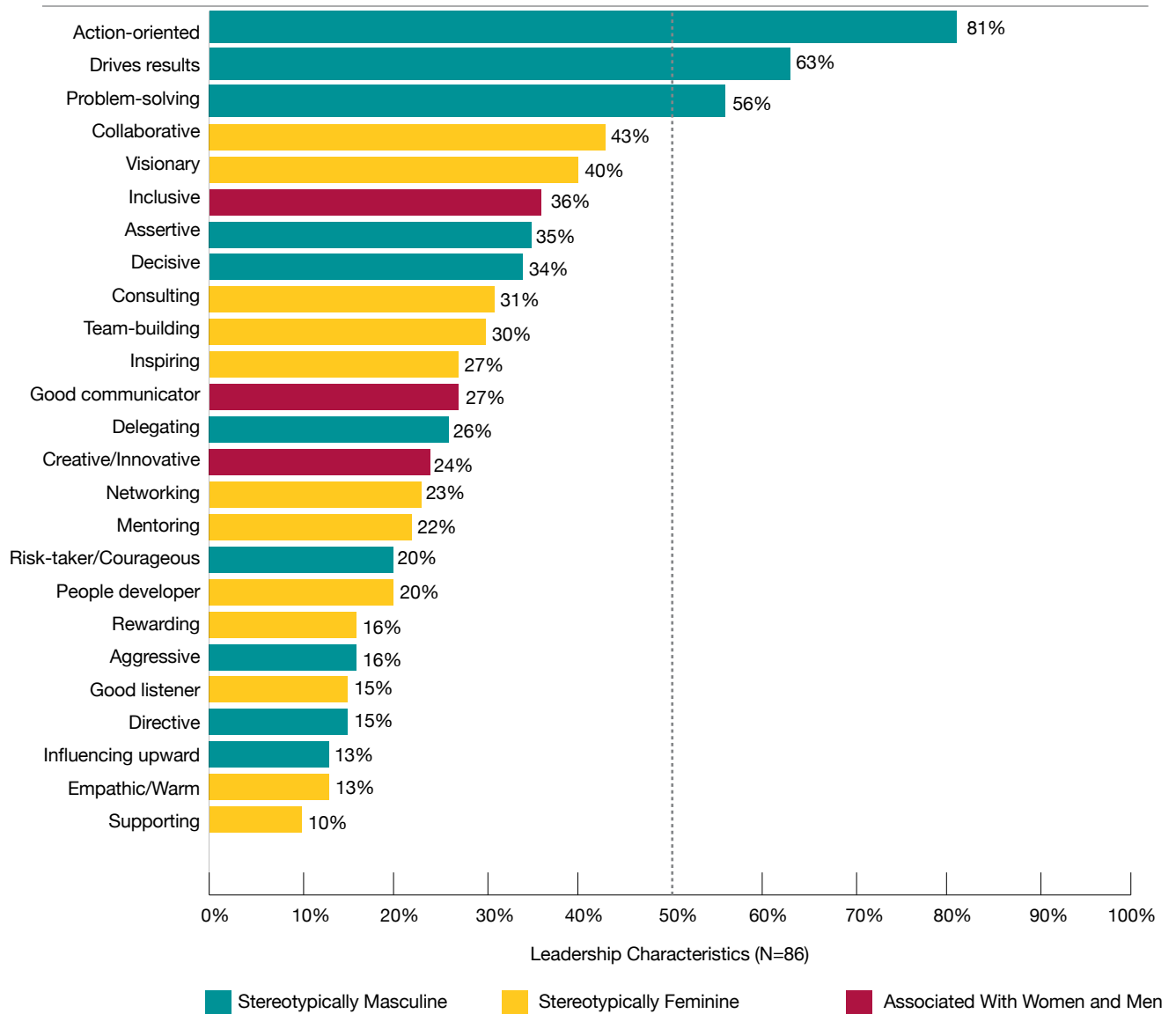
24. Participants were asked to check up to ten characteristics that describe leaders in their organization.

25. Bauer and Baltes.

26. See Appendix 2 for a guide for evaluating gender-stereotypic language.

FIGURE 2

Leadership Characteristics Described by Online Survey Respondents



Considered together, results were consistent with psychological research on gender stereotypes about women and men.²⁷ Catalyst data also revealed that:

- Stereotypically masculine behaviors were commonly used to describe and portray people with strong technical/analytical skills. The top descriptors were knowledgeable, problem-solver, sees the big picture, and critical thinker. Mathematical, intelligent, and detail-oriented were also used.

Implication: When people perceive technical/analytical skills as stereotypically masculine, employees run the risk of unconsciously assuming that women are less likely than men to possess such attributes. Thus, performance evaluations and project assignments are vulnerable to disadvantaging women who are proficient as technical/analytical thinkers and leaders.

- Stereotypically feminine behaviors were used most often to describe people with strong administrative and interpersonal skills. The top characteristics for administrative abilities were organizational skills and attention to detail. Communicating, collaborating, supporting, relationship-building, multitasking, coordinating, and planning were other characteristics commonly cited. Stereotypically feminine characteristics such as being warm and empathic, good at resolving conflicts and listening, and collaborating were used most often when participants described people with strong interpersonal skills.

Implication: Catalyst research on gender stereotypes shows that gender biases are alive and well in business. As such, stereotypes may cause organizations and individuals to erroneously narrow the range of effective behaviors for both women and men and seriously undermine the power and influence of women leaders²⁸ as well as the characteristics that are needed for business success.

Further verification that organizations are at risk of embedding stereotypes in their leadership competency models was evident in the in-depth interviews with experts and architects, some of whom unconsciously and often erroneously used stereotypes to explain why women were not advancing at rates similar to those of men.

In merchandise, my guess is that women and men are developed differently...I know [the guys] were rotated in from stores and...did not have as much fashion knowledge, so the guys had a lot more catching up to do...With the women, you couldn't tell. [If] a man came up in fashion or merchandising and marketing, he knows the trends, but if they come from finance or something like that they would need to catch up. Survey all the males and women in your department and see how many pairs of shoes they have. Women are more likely to know what a Jimmy Choo shoe is than men.

— Male, Mid-level manager,
National consumer products-retail

There is a perception that women aren't strong or intense enough, or don't have the intellectual horsepower to debate or stand up to male senior leaders, like the CEO. There is also a stereotype that HR women aren't smart.

— Man, Executive,
Multinational financial services

One stereotype is the assumption that women are more worried about work-life balance than men. An example would be having two candidates for an out-of-town assignment and assuming that it will be less stressful for a man to be away from home than a woman.

— Woman, Mid-level manager,
Multinational professional services

When talent management experts favor stereotypically masculine leadership characteristics, they risk pushing pro-male criteria into their leadership competencies. This can inadvertently disadvantage both the organization and women.

27. Bauer and Baltes; Lyness and Heilman. See also Appendix 2.

28. Catalyst, *The Double-Bind Dilemma for Women in Leadership: Damned if You Do, Doomed if You Don't* (2007); Alice H. Eagly and Linda L. Carli, "Women and the Labyrinth of Leadership," *Harvard Business Review*, vol. 85, no. 9 (September 2007): p. 62-71; Groves (2007).

Leadership characteristics seen as stereotypically feminine, such as visionary, which has been shown to have positive effects on business successes,²⁹ will be undervalued. Similarly, performance evaluation processes and programs that reflect stereotypically masculine criteria place women in situations where they are likely to be seen as coming up short, which negatively affects their opportunities for advancement.³⁰

In sum, our findings suggest that values and characteristics stereotypically ascribed to women are less likely to be seen in senior leadership teams than those stereotypically ascribed to men. Researchers have found that diverse leadership teams can facilitate the greatest organizational changes and have positive impacts on net profit margin and stock value.³¹ In other words, valuing core competencies beyond those identified as stereotypically masculine and primarily reflective of senior leadership teams has potential benefits to a company's bottom line.

BIAS IN SELECTION FOR HIGH-VISIBILITY ASSIGNMENTS

The risk of masculine stereotypes infiltrating talent management also shows up in decision processes for who receives plum assignments in the organization—the kind that are necessary for promotion. Catalyst knows from research and consulting experience that one reason gender gaps persist is the inequitable distribution of high-visibility assignments.³² Such assignments directly or indirectly stem from leaders at the top. Our in-

depth interviews with talent management experts and architects revealed that project assignments tend to be made in two ways:

- When the project assignment had high visibility, high consequences, significant responsibilities, and/or required highly specific skill sets or competencies, senior executives or teams of employees were often involved in the assignment decision.
- When project assignments were less high-profile, they were often made selectively by business unit managers or employees designated to allocate projects to individuals and teams.

Implication: When senior executives or teams of employees give high-visibility assignments to people that they do not directly supervise, they run the risk of unconsciously using stereotypes. In the absence of first-hand experience upon which to base their judgments or training to minimize gender bias when evaluating others, senior leaders and project assigners are left to fall back on perceptions that may not be behaviorally anchored but rather result from stereotypic impressions.

While a few of the leading organizations we interviewed demonstrated rigorous processes for creating equal opportunities for women and men to participate in high-visibility assignments, most participating organizations did not report processes for determining whether gender bias contributed to how assignments were distributed.

CHAPTER SUMMARY

If senior executives set the tone, determine who gets what (e.g., high-visibility assignments), and demonstrate the behaviors embedded in leadership competency models, organizations risk pro-male criteria creeping into strategies and perceptions, inevitably disadvantaging women and businesses as men and senior leaders reap more benefits from the cycle.

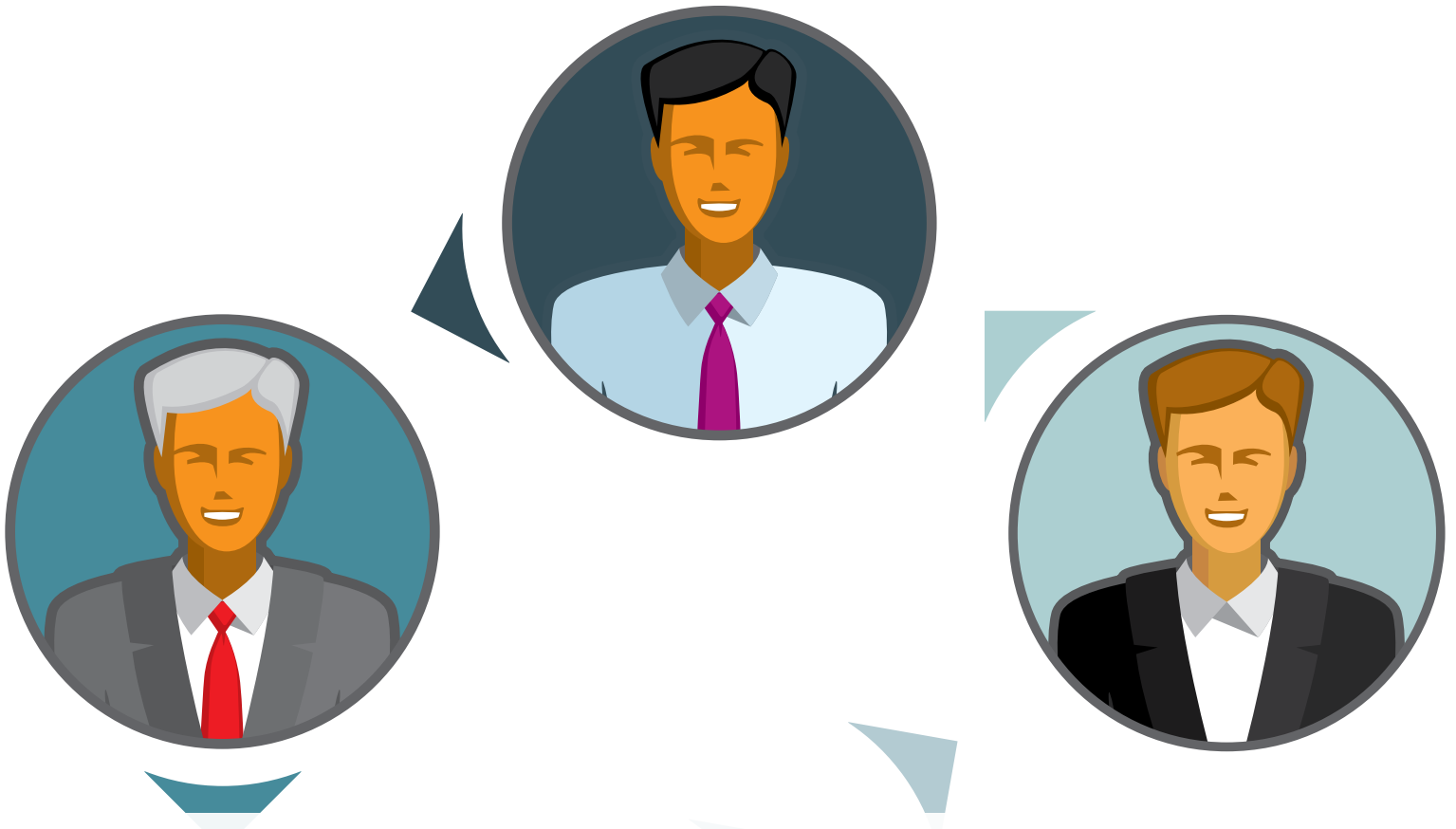
Despite evidence that diverse leadership teams outperform those that lack diversity, gender gaps persist—senior executives are predominantly men and perceived competencies of leaders are more frequently stereotypically masculine.

29. The term “visionary” has been associated with women and men, but research by Grove (2006) suggests that the term tends to be more stereotypically feminine than masculine. The term was not included in Appendix 2 because psychological research examining gender stereotypes associated with the term is limited.

30. Bauer and Baltes; Lyness and Heilman.

31. Groves (2006), p. 567; David A. Waldman, Gabriel G. Ramirez, Robert J. House, and Phanish Puranam, “Does Leadership Matter?: CEO Leadership Attributes and Profitability Under Conditions of Perceived Environmental Uncertainty,” *Academy of Management Journal*, vol. 44, no. 1 (February 2001): p. 134-143.

32. Project assignment processes at professional service firms are distinctively different from those in other industries. Participants from this study reported that because of their client focus, many professional service firms have employees specifically tasked to assign projects.



CHAPTER 3

DISADVANTAGING WOMEN:

Stereotypes in Talent Management Procedures, Programs, and Tools



CHAPTER AT A GLANCE

- Stereotypically masculine characteristics were frequently embedded in talent management documents focused on senior leadership criteria.
- Some talent management experts acknowledged that stereotypes were used in their organizations in ways that disadvantage women.
- Career development programs such as succession planning and multi-rater feedback are disproportionately offered to senior leaders—mostly men and/or designated high-potentials who may be identified based on masculine criteria.

TALENT MANAGEMENT EXPERTS AND ARCHITECTS

HR departments are charged with designing, implementing, evaluating, and refining talent management plans. To do so, they must work with managers to translate the strategies, policies, goals, and objectives of senior leaders into performance goals and objectives for departments, teams, and individual employees.

As the link between other stakeholders in the organization, HR departments have the potential for controlling bias in their systems. How they design procedures, programs, and processes can make a difference. Yet few studies have examined whether gender bias is present in these important tools. To determine the extent to which gender bias might be present in performance management systems, Catalyst asked talent management experts to provide documentation of their practices and programs.

Overall, the comprehensiveness and sophistication of some talent management systems we evaluated were very impressive. The depth and breadth of talent management processes and programs suggest solid efforts by some companies and industries to develop and advance talent in today's global economy.

Most participating organizations described their overall system as formalized, customized, and centralized—reporting both formal (e.g., performance reviews, high-potential,³³ succession planning, 360-degree feedback, mentorship) and informal career development programs.³⁴

TOUGH NEWS

Formal Succession Processes Can Perpetuate Senior Leadership Characteristics and Bias Who Gets Promoted

We heard in interviews that succession planning and advancement criteria cascade from the top down and do not consider the impact of gender bias on who is rewarded and what competencies are desired.

We have a succession-planning process managed by our talent review process, but it varies by business. However, everyone who reports to the CEO completes the formal [succession-planning] process. Every person that reports to the CEO brings in their organizational structure and the people on their team who support their roles. The CEO and SVP of Human Resources do the roll-up to develop the succession plan.

—Woman, Executive,
Multinational technology

The [talent management] process is sponsored by senior leaders and guided by our 14 business principles [of career management and succession planning] and tied to competency models, which gives us a competitive advantage. So people expect it every year.

—Man, Executive,
Multinational financial services

33. HayGroup reports that high-potential employees are usually identified based on whether they are ready, willing, and able to perform in their immediate next role (suitability) and/or their possession of a latent long-term quality to provide leadership in the future after being identified and nurtured (adaptability). See HayGroup, "Potential—for What?" (2007), http://www.haygroup.com/downloads/us/Potential_for_What_REBRAND_2008.pdf.

34. Of the organizations without formal and centralized systems, many are currently transitioning to such and others are in industries in which a centralized system would not work.

We developed criteria based on looking at partners who are successful. We analyzed that and then developed competencies based on what we need. That is also used to recruit and hire new employees.

—Woman, Mid-level manager,
Multinational professional services

TALENT MANAGEMENT DOCUMENTS AND SURVEY FINDINGS

At first blush, content analysis³⁵ of hundreds of documents (user manuals, roles and competencies, leadership criteria, annual performance review forms by level, goal-planning forms, role calibrations for each level, and promotion criteria) revealed a seemingly gender-neutral tone and inclusive language. There were few obvious examples of stereotypic language or criteria that could contribute to gender biases against women or men.³⁶ However, a more thorough analysis uncovered cause for concern. In addition, a systematic thematic review of documents³⁷ focusing on role calibration, promotion criteria, and leadership competencies revealed other concerns.

GOOD NEWS

Some Competencies and Criteria Are Gender-Neutral

Diversity dimensions such as being culturally sensitive, recognizing that diversity is not optional, and treating others fairly were included in some of the documents we reviewed.

TOUGH NEWS

Stereotypically Masculine Leadership Criteria Were Disproportionately Ascribed to Senior Leaders

The concern raised in Chapter 2, that masculine stereotypes resulting from the pervasiveness of male-dominated leadership teams could bias talent management systems, was confirmed. Behaviors shown as stereotypically masculine³⁸ (driving results, executing, being action-oriented, leading others, and solving problems) were found more frequently in talent management documents that focused

on senior leadership positions than in other talent management documents. It is noteworthy that the same behaviors were used by survey respondents to describe their senior leaders.

GOOD NEWS

All Employees Have Access to Some Talent Management Practices and Programs

Findings from the online survey, displayed in Figure 3, reveal that a majority of companies provides some programs and practices (mentorship opportunities, individual development plans, and online training tools) to all employees.

TOUGH NEWS

Not All Employees Have Access to Important Talent Management Practices and Programs

Not all employees have equal access to important talent management practices and programs—including well-developed performance evaluation processes. Figure 3 also suggests that this differential access advantages some leaders—mostly men and, to some extent, high-potentials. More than 50 percent of talent management experts indicated that succession-planning and specialized leadership development programs were primarily for senior leaders in their organizations.

TOUGH NEWS

Performance Reviews Are Tied to Promotion and Compensation for All Employees, but Criteria and Competencies Can Disadvantage Women

We found that promotions and compensation rates were linked to annual performance reviews at most organizations. Thus far, we have also found that some talent management criteria and competencies included in performance review documents have a pro-male bias and that programs at most organizations were not appropriately vetted for gender stereotypes. Based on prior Catalyst research, we have learned that gender stereotypes can lead to disproportionately greater opportunities for men than for women.³⁹

35. See Appendix 1 for a complete explanation of procedures used for the content analysis.

36. Analyses of performance instructions, role-calibration documents, and diversity statements are based on the tables in Appendix 2.

37. See Appendix 1 for a complete explanation of procedures used for the thematic review.

38. Catalyst, *Women “Take Care,” Men “Take Charge:” Stereotyping of U.S. Business Leaders Exposed* (2005); Catalyst, *Different Cultures, Similar Perceptions: Stereotyping of Western European Business Leaders* (2006). See also Appendix 2.

39. Catalyst, *Women “Take Care,” Men “Take Charge:” Stereotyping of U.S. Business Leaders Exposed* (2005); Catalyst, *Different Cultures, Similar Perceptions: Stereotyping of Western European Business Leaders* (2006); Catalyst, *The Double-Bind Dilemma for Women in Leadership: Damned if You Do, Doomed if You Don’t* (2007).

FIGURE 3

Who Gets What: Talent Development Programs (n=86)⁴⁰

	Programs for Senior Leaders and/or High-Potential Employees Only	Programs for All Employees
Programs Provided by More Than 50% of Companies	<ul style="list-style-type: none"> • Succession planning • High-potential programs • Executive training programs • Other leadership development programs 	<ul style="list-style-type: none"> • Individual development plans • Formal and/or informal mentorship programs • Online training tools
Programs Provided by Fewer Than 50% of Companies	<ul style="list-style-type: none"> • Multi-rater (360-degree) feedback 	<ul style="list-style-type: none"> • Succession planning • Multi-rater (360-degree) feedback

Implication: While succession planning and multi-rater feedback are costly to business, overlooking employee talent not identified as senior leaders or high-potentials is detrimental to business success. Moreover, because leadership competencies and some talent management documents include more stereotypically masculine than feminine

characteristics, women are more susceptible to the negative effects of gender bias in their annual performance reviews than men.⁴¹ Thus, women are less likely than their male counterparts to benefit from advancement and development opportunities, and senior leaders benefit the most from talent management programs.

When analyzed by industry, the following trends emerged:⁴²

Multi-rater feedback is only for leaders in:

- 70 percent (n=10) of firms in the financial services banking industry.
- 83 percent (n=6) of companies in the financial services insurance industry.
- 56 percent (n=9) of firms in the law industry.

Succession planning is only for leaders in:

- 70 percent (n=10) of firms in the financial services banking industry.
 - 83 percent (n=6) of companies in the financial services insurance industry.
 - 100 percent (n=5) of companies in healthcare and health insurance industries.
- Conversely, 78 percent (n=7) of law firms reported that they did *not* have succession planning for leaders only.

40. Data included in Figure 3 are from online survey responses. Items used in the online survey were developed based on in-depth interview findings.

41. Lyness and Heilman, p. 782; Eagly and Carli.

42. Data on other industries, headquarters locations, and corporate reach are not highlighted because the sample sizes of companies were too small.

Leadership development programs do not necessarily disadvantage women. It is the differential access—the processes by which employees are selected into those programs—that is easily impacted by gender stereotyping. In many companies and industries, only certain teams and/or top employees receive the maximum benefit from talent management advancement strategies.

Quotations from the talent management architects we interviewed support the online survey results.

Succession planning is what we use for our key positions, and as a companion process to succession planning, we do not use high-potential any more. We call it a leadership development pool, which is where less than 4 to 5 percent of employees are identified through an independent assessment, which considers many factors. It's a subjective assessment by managers, and that's the benchmark. It's a beauty parade—we have 25 to 35 percent dropping from the pool each year. Our performance review is not a good indicator because we have rater inflation, and we think that managers are reluctant to do forced-ranking or rate on a bell curve, so we don't have a lot of rigor around what the ratings are or how high they are.

—Man, Mid-level manager,
Construction/Engineering

We have succession planning for our top 200 directors and above; 360-degree multi-rater feedback is not part of our performance management process because the organization believes that when you say it will affect pay, people tend to rate higher—so it's part of development. We have one business unit where all leaders have 360-degree feedback, and it is used to help them create the development portion of their performance plan.

—Woman, Mid-level manager,
Industrial/Materials

We have got to get better at identifying high-potential people early in their careers. There is often confusion about what is a high-performer versus a high-potential. People equate them, and they are different.

—Woman, Executive,
Multinational technology

MAKING SENSE OF MIXED NEWS

What does this mixed news tell us? It tells us that companies should be particularly careful when developing and evaluating their talent management forms and tools; that all employees should be trained to understand that both women and men hold leadership competencies stereotypically ascribed to women and men; and that pro-male criteria can have adverse effects on performance appraisals and advancement opportunities for employees whose competencies are not appropriately valued or evaluated.

There is no doubt that being action-oriented, driving results, and solving problems are essential traits for leadership and business success. However, customizing tools and documents in ways that perpetuate bias against women is problematic.

Catalyst believes that there are three major reasons for concern:

1. Unconscious perceptions about how women and men ought to behave can limit a person's ability to evaluate others without bias. That is, women and men have been shown to apply gender stereotypes in their judgments of others—even without intending to do so and despite the fact that both women and men hold characteristics stereotypically ascribed as feminine or masculine.
2. Both women and men tend to prejudge other women and men as having stereotypically feminine and masculine traits, respectively. Such unconscious biases can disadvantage women when

pro-male criteria are valued or evaluated higher. In general, pro-male bias occurs when men are rated more favorably than women with similar performance.⁴³

3. Other competencies and characteristics are evidenced as equally important to leadership and business success, but are not evaluated as highly as those outlined above.⁴⁴

Research on the effects of double standards in the performance evaluation of women and men indicates that when individuals evaluate the performance and competencies of the opposite sex, their standards are likely to be stricter for a woman than for a man, even when both people under evaluation perform at the same level.⁴⁵

Similarly, designing systems that provide development opportunities only to senior leadership teams is particularly detrimental to women.⁴⁶ Since women are less likely to hold senior executive positions, especially in male-dominated industries, their ability to influence who gets access is limited. Such limited influence for women risks the creation of a culture that favors stereotypically masculine attributes.

Women who suffer the effects of gender bias in their annual performance reviews will be less likely to qualify for promotions, merit increases, and bonuses. Career advancement and development practices such as 360-degree feedback, succession planning, and executive training that are geared toward senior leaders and high-potentials therefore reinforce the slow advancement of women, who are less likely than men to hold these positions.⁴⁷

CHAPTER SUMMARY

We uncovered gender biases and stereotypes in several components of talent management systems and acknowledged that talent management experts and architects, like senior leaders, can contribute to gender bias in talent management. When practices such as succession planning and multi-rater feedback are only available to a limited few, everyone loses—the talent pool becomes artificially diluted, valuable feedback is not solicited, and, ultimately, the business suffers. To mitigate the negative effects of gender bias at all levels of an organization, corporations and firms must develop checks and balances that ensure more inclusive talent management and more effective senior leadership involvement.

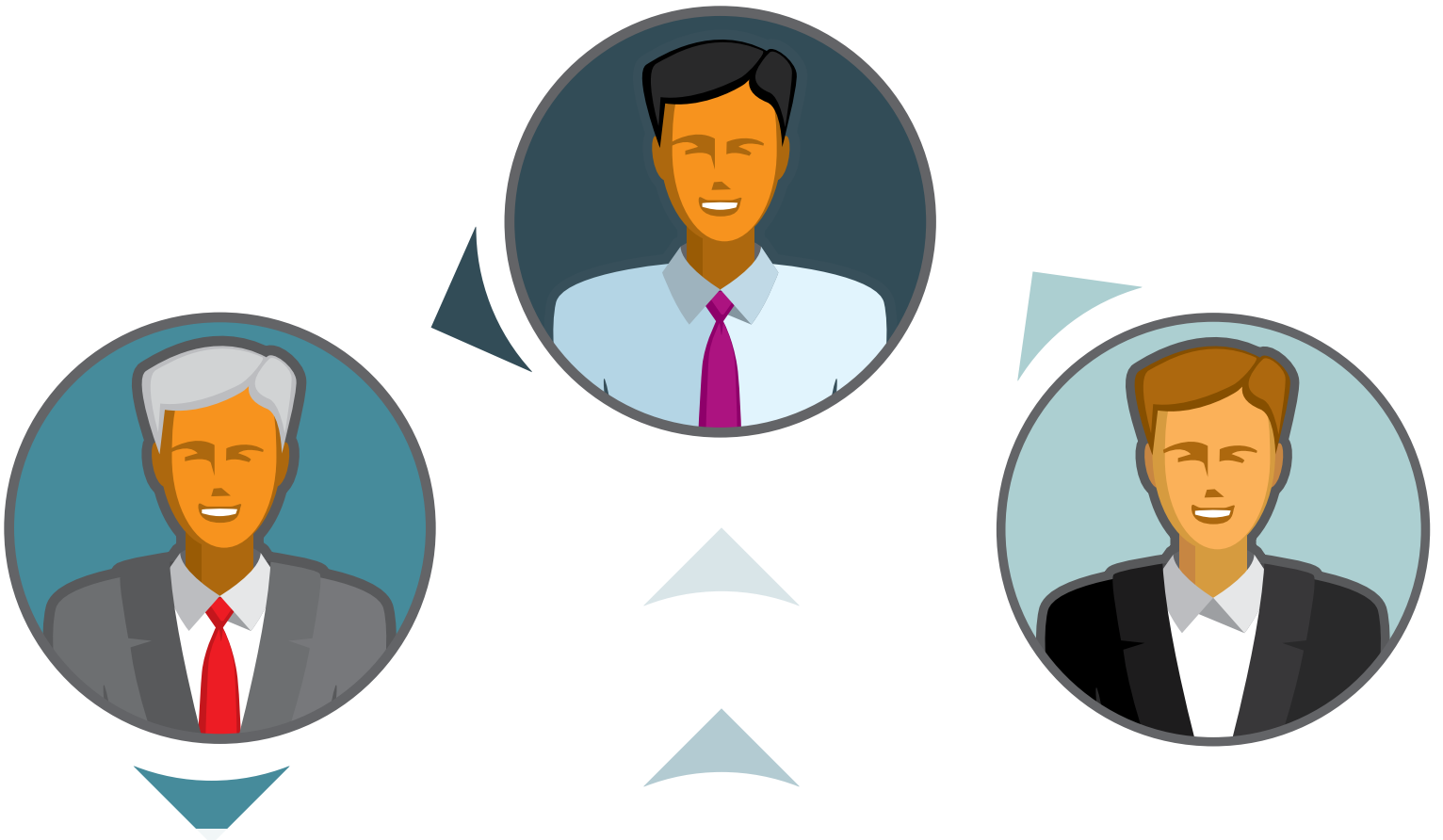
43. Bauer and Baltes, p. 473.

44. Groves (2006); Groves (2007); Ram Charan, "Leadership Essentials: How Can You Identify the High Potentials?," *Leadership Excellence*, vol. 25, no. 1 (January 2008): p. 9; Waldman et al.

45. Martha Foschi, "Double Standards in the Evaluation of Men and Women," *Social Psychology Quarterly*, vol. 59, no. 3 (September 1996): p. 237-254.

46. Elmuti et al., p. 15.

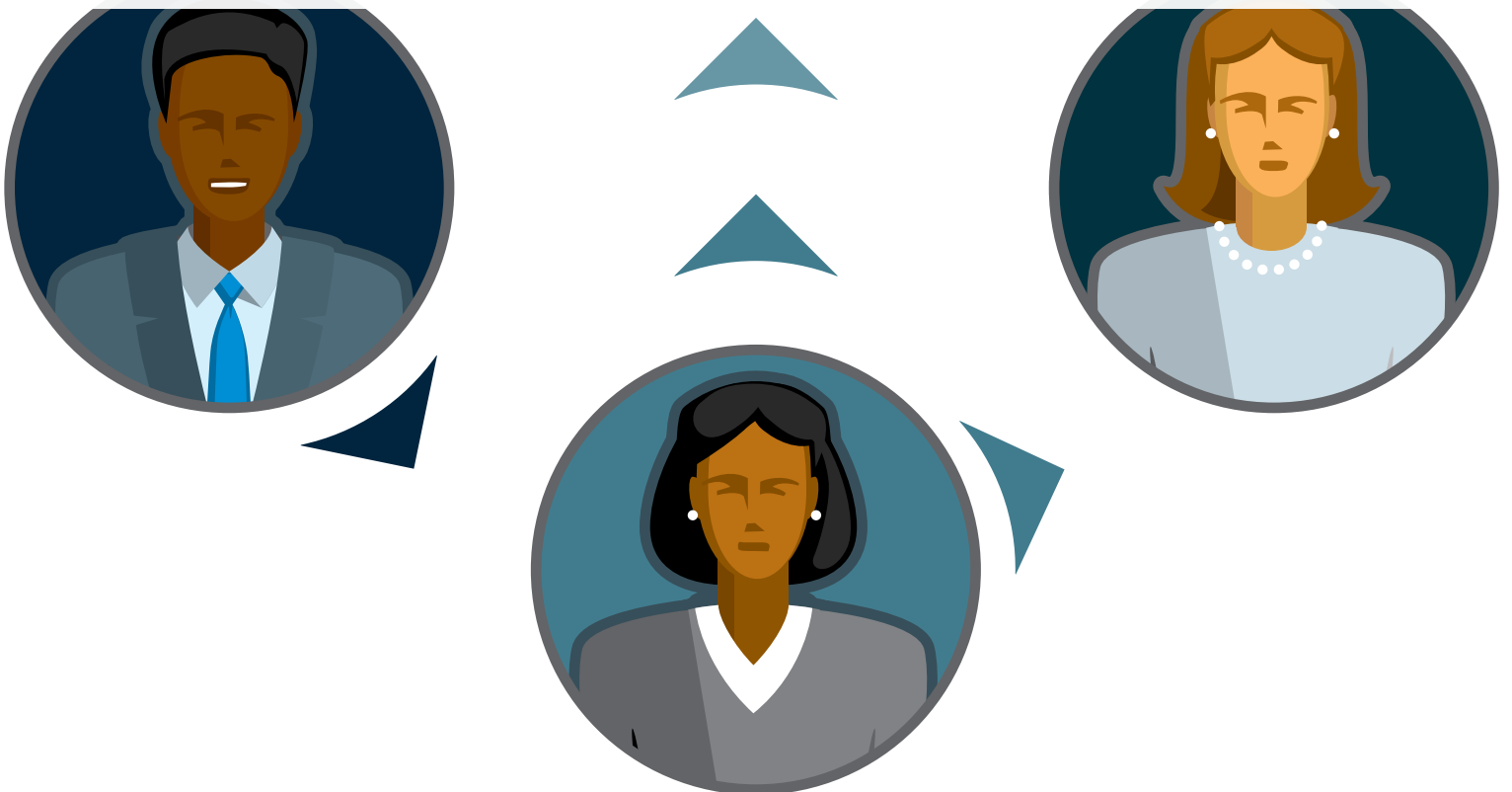
47. Eagly and Carli, p. 65; Elmuti et al., p. 15; Groves (2007), p. 255.



CHAPTER 4

COMPOUNDING EFFECTS:

When Imperfect Execution Creates a Vicious Cycle



CHAPTER AT A GLANCE

- **Imperfect execution.** When talent management practices and programs interact, gaps between the design and execution can introduce gender bias, even to systems already sensitive to the problem.
- **Checks and balances.** Few companies employ effective checks and balances that mitigate gender bias in talent management and decrease gender gaps in senior leadership.
- **Perpetual loops.** The cyclical structure of talent management appears to reward attributes based on bias inherent in the system, creating a perpetual cycle in which men dominate senior leadership positions.

IMPERFECT EXECUTION: WHEN GAPS BETWEEN DESIGN AND EXECUTION INTRODUCE BIAS

All employees play a critical role in determining whether talent management systems are effective. We have seen the influence senior leaders exert in cascading norms about what is valued and rewarded in business, as well as the risk of bias that can be introduced as HR and talent management teams design programs, processes, and procedures. Included in the cycle are managers and supervisors who use processes and tools provided by HR departments to evaluate the performance of individual employees and make decisions about opportunities for development and advancement.

The differences between what is intended and what is practiced may be yet another source of gender bias. Some talent management experts and architects we interviewed recognized that, despite their best efforts to design bias-free processes and programs, a gap exists between system design and execution. At the end of the day, managers and supervisors must implement the talent management practices, programs, and processes.

The following quotations showcase some of the challenges encountered when implementing formal talent management systems and/or developing training on minimizing gender stereotypes.

We have formal systems, but historically there have been some cowboys going out on their own.

—Woman, Mid-level manager,
Multinational pharmaceutical

We underestimated how challenging it would be for managers—who may not be very experienced or very good managers—to provide honest feedback. So, some employees who never had Individual Development Plans were struggling with giving and receiving feedback and writing a really good, meaningful, and honest development plan.

—Man, Executive,
Multinational multi-industry

It is more than just putting in gender-neutral words to get people to change their behaviors about stereotyping and biases. Gender stereotyping issues in performance management systems are confusing for many people to grasp because of the practical reality of how it gets carried out. We tell people how to not stereotype but at the end of the day, if a manager is thick-headed about it and if you are training them to think about how women and men lead differently—in a more subtle way—how to evaluate different types of leaderships without stereotyping becomes very confusing. In the most generic sense, managers understand what gender stereotyping means, but in a subtle or nuanced sense they may not know how to foot the different messages and I don't think you can get to it through words. Managers who are getting messages and can't think more fully through it, they don't get it.

—Woman, Executive,
Multinational financial services

Nothing in the formal processes is different for men and women. When we look at people who are up for partnership, more women fall out. Informally, we always have the risk that stereotypes and implicit biases exist. Beyond saying that, we try to remove that.

—Man, Executive,
Multinational professional services

Consistent with Catalyst’s study *The Double-Bind Dilemma for Women in Leadership: Damned if You Do, Doomed if You Don’t*,⁴⁸ talent management experts and architects that we interviewed also alluded to imperfect execution—a systemic difference in the rates of promotion, evaluation, and advancement for women.

Based on the data that I see and the lack of gender diversity at some of these high levels, it raises the question that either we do not have enough women in the pipeline or it is about how we value women. So, for example, we have general managers (presidents) in our different countries and 95 percent of those that are replaced are replaced by men.

— Man, Mid-level manager, Multinational consumer products

It’s not intentional, but unintentionally, yes, they are evaluated, developed, and promoted differently. You look at the results and you have to say that there is something there that is different. Either we evaluate them differently or we value what they bring to the table differently.

— Woman, Mid-level manager, Telecommunications

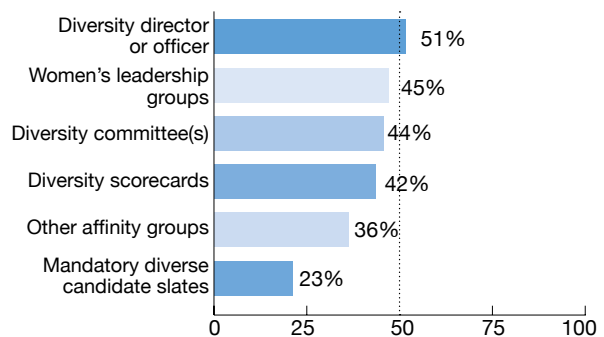
Despite the comprehensiveness of many of the talent management systems we examined, Catalyst found most fell short when it came to bridging the gap between effectively designed and developed talent management programs and effective implementation to ensure those programs included all employees in the company.

CHECKS AND BALANCES: A CASE FOR INTENTIONAL CONTROLS

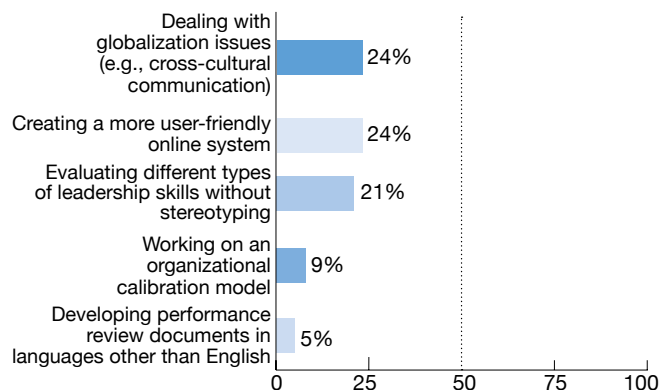
Leading organizations have demonstrated that having appropriate checks and balances in place can mitigate gaps between program design and execution and that they can create opportunities for the development and advancement of all employees.⁴⁹ However, of the 110 companies that

participated in our study, both qualitative and quantitative data indicated that few companies have intentional controls in place that guard against gender bias in performance review forms and evaluations.⁵⁰ Where safeguards were in place, most were post-hoc—conducted after performance appraisals were completed (e.g., equity analyses, diversity scorecards, career counseling).

While many companies that completed our online survey (n=86) had web-based tools and/or face-to-face training programs, only 51 percent had diversity directors or officers, and even fewer had practices and programs designed to increase diversity and gender equity:



The data were more alarming when we examined whether companies were focused on minimizing bias and increasing inclusion. As the following data reveal, very few companies (n=86) provided training on how to avoid stereotypic bias when evaluating others:



48. Catalyst, *The Double-Bind Dilemma for Women in Leadership: Damned if You Do, Doomed if You Don’t* (2007).

49. Data from leading organizations with appropriate checks and balances and Diversity & Inclusion Practices identified from other Catalyst sources are showcased in Chapter 5.

50. Because 19 sectors were represented, the sample size of most sectors was not large enough to explore trends within each sector. Rather, this report focuses on general trends across sectors and only highlights sector-specific trends in cases where five or more companies represented a given industry.

Our qualitative data yielded the same results—little attention to the effects of gender stereotyping on talent management processes and programs. When organizations neglect to mitigate gaps between talent management program design and execution, they create a compounding effect that initiates a vicious cycle.

PERPETUAL LOOPS: THE CYCLICAL NATURE OF TALENT MANAGEMENT SYSTEMS

Closer evaluation of talent management systems revealed that many are vulnerable to pro-male biases that have a compounding negative impact on women and business. Specifically, data uncovered the existence of a vicious loop, a cycle characterized by systemic bias that amplifies the effects of gender biases in talent management.

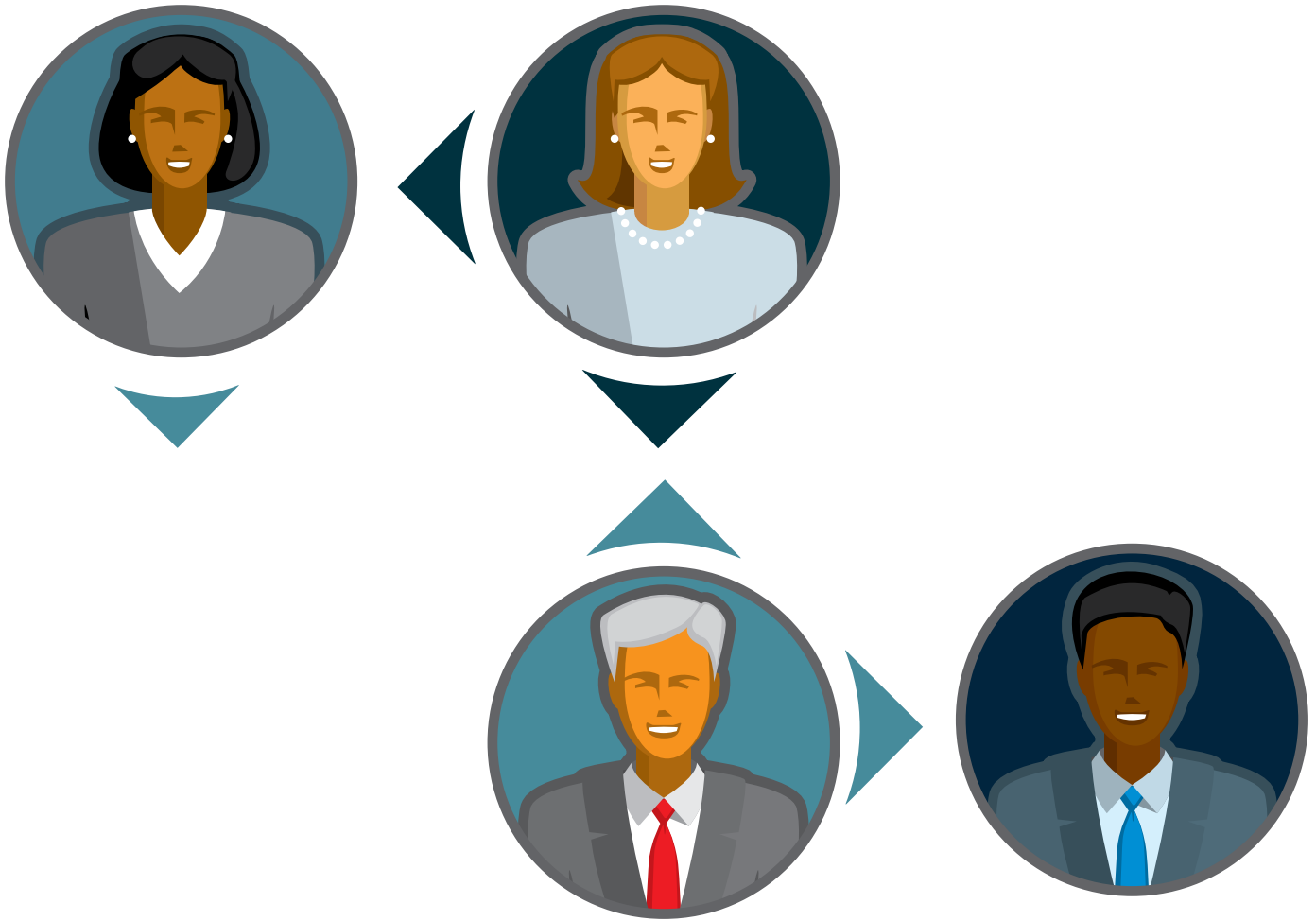
The process has come full circle. At every point in the cycle, the system is vulnerable to pro-male bias that inevitably results in a less diverse pool of employees eligible for the development opportunities that ultimately lead to senior executive positions.

The interaction among stakeholders in the talent management systems begins and ends with senior leaders, essentially creating a perpetual cycle where promotions leading to senior leadership positions are based on the cascading of norms, goals, and characteristics from senior executives to each individual employee:

- Senior leadership teams, typically predominated by men, set the tone and cascade norms throughout the system.
- HR experts translate senior leaders' norms into talent management programs, processes, and tools. Because senior leadership teams are predominantly male, masculine stereotypes are frequently ascribed to them and can creep into human resources tools.
- Managers and supervisors use processes and tools developed by HR experts, but not always in the way in which they were intended, resulting in imperfect execution.
- All employees are involved in the system through performance evaluation and review programs.
- Some employees meet accepted criteria, are selected for promotion and/or tapped as future leaders, and provided high-potential development opportunities that ultimately lead to senior leadership positions.

CHAPTER SUMMARY

While companies are becoming more dedicated to increasing gender diversity in senior leadership, the mechanisms by which gender bias enters talent management systems remains elusive. A failure to address the introduction of bias at any point has a compounding effect as the process plays out into a vicious cycle, making the effects of gender bias much more profound, especially for women. As a result, even the most sophisticated and comprehensive systems can experience gaps between design and implementation and in the advancement, promotion, and compensation rates of women and men.



CHAPTER 5

MITIGATING RISKS AND BREAKING CYCLES: Strategies and Recommendations



CHAPTER AT A GLANCE

- **Next steps.** Talent management experts shared their plans for reducing gender bias and improving talent management systems.
- **Strategies and recommendations.** Actionable strategies and recommendations were developed based on extensive analyses of qualitative and quantitative data collected from talent management experts, architects, managers, and seminal research on organizational change and effectiveness.
- **Diversity & Inclusion Practices.** Leading companies evaluated and adjusted their talent management practices to minimize gender inequities, mitigate gender bias, and increase business success.

Catalyst recognizes that effective and inclusive talent management systems require formalized, customized, and localized strategies and programs with measureable results at individual, departmental, and organizational levels. Once the systemic weaknesses described in this report are addressed, organizations and their leaders can begin to make the changes necessary to maximize their talent pools.

NEXT STEPS: WHAT PARTICIPATING COMPANIES ARE DOING

Even organizations and industries with the most effective and inclusive talent management practices and programs must pay attention to the effects of bias on a process-wide level. Thus, all companies must identify talent management practices that create gender gaps and then institute appropriate checks and balances to ensure the processes and procedures match designed objectives and desired outcomes.

Talent management experts provided the following recommendations for improvement:

- Examine current forms for gender stereotypes and biases.
- Develop worldwide leadership competency models.
- Review practices from other companies.
- Continue to develop, recruit, and retain all employees.
- Foster and build trusting relationships between managers and employees.
- Ensure that women and people of color thrive within the company.
- Empower managers to run performance management processes.
- Address individual biases at all levels of the organization.

STRATEGIES AND RECOMMENDATIONS: LIMITING BIAS AMONG STAKEHOLDERS

What can organizations do to limit opportunities for bias to enter their talent management systems? Catalyst has developed the following recommendations based on extensive analyses of qualitative and quantitative data collected from talent management experts, architects, managers, and seminal research on organizational change and effectiveness.

1. Create opportunities for senior leaders and employees to engage in interactive dialogues about talent management.

Senior leadership support is essential to creating diverse leadership teams, but senior leaders cannot do it alone. HR departments, managers, and employees at all levels of the organization need to be involved in developing and embracing a broader perspective of what makes an effective leader.

The following quotation showcases a strategy for developing talent while exposing senior leaders to a broader base of employees.

The reviewing partners complete a composite summary, which is then given to the associate. A formal review with one of the area practice leaders is meant to talk about where they are and where they should be going. We also instituted an upward review process a few years ago, where the associates review the partners on their performance regarding how they interact with the associates. This is done on an anonymous basis. We try to have more than three partners give the review to keep things anonymous. We have seen some dramatic changes in [partner] behavior from the summary feedback given by the associates. If there is a serious issue with the partner, we do counseling and coaching with that partner.

— Man, Executive,
Multinational professional services

2. Create strategies that increase development and advancement opportunities for women.

Establish a business case for minimizing gender stereotyping in talent management determined by a fact-based assessment of your organization's talent management system. Remember to consider the business rationale, organizational priorities, and goals that drive your business.

Some leading organizations use talent management processes such as multi-rater feedback as an intentional control to minimize the effects of gender bias in performance reviews.

In addition to intentional controls such as reviewing our talent management forms and documents for gender-biased language, a team of employees monitors and minimizes stereotyping during promotion meetings. The big 360-degree feedback process drives development and training, helps inform promotion, and compensation, but there is no direct line; 360-degree results are also used by diversity. I take aggregate data and look at how women and men and employees from different racial groups are doing. I analyze biases in ratings using an algorithm toward toughness and leniency.

Specifically, I look at adverse impacts. For example, if someone's 360-degree feedback data from a self-evaluation versus evaluations by others are different from that person's manager's ranking by two levels or more, then that skip/gap is analyzed. I will notice if there are four-level skips. This is done annually. We are asking about sexual orientation this year. Forced ranking (derived) in 360-degree reviews is based on global peer groups. Rank is predicated on the adjusted average based on nine competencies from the algorithm. One control that we do look at is disparity of females and historically underrepresented groups (women of color and people of color). Specifically, we follow up when there are two or more differences between 360-degree quartiles and manager quartiles and ask about diversity and equitable treatment. People who are given low ratings are flagged: their reviews are pulled and reviewed by my team.

—Man, Executive,
Multinational financial services

3. Develop targeted programs based on the unique needs of each business unit.

Given senior leaders' influence on talent management systems, cascading goals and priorities, and executive-level promotions, training programs should focus on:

- Implementing strategies for developing more diverse executive teams.
- Adopting a long-term perspective on identifying and developing leadership talent to avoid a replacement approach to succession planning.⁵¹
- Increasing the use of stereotypically feminine criteria and perspectives and minimizing the overuse of stereotypical masculine criteria and perspectives in the C-suite.
- Decreasing exclusionary informal network practices among executives.
- Developing more inclusive and effective organizational goals and objectives.

Some companies are already changing their talent management systems.

[Women "Take Care," Men "Take Charge:" Stereotyping of U.S. Business Leaders Exposed (Catalyst, 2005)] came out, and we thought it would be beneficial to look at our performance management systems based on what we knew about gender stereotypes. We only had inferential material on our documents, nothing specifically on gender stereotypes. We created a team from various levels and departments to develop questions and make changes.

The team [took the questions] to the divisional HR heads and got buy-in from each group. Then, the executive office had to give buy-in. They gave buy-in, and then we trained employees on how to avoid stereotypes and how to make people aware of when they were using stereotypes before they interviewed candidates for promotion. We trained them on how to think of people outside of a particular mold.

One reason we did it was because we heard that people were stereotyping. Assumptions were made that women were in support roles and men were making the money. We were concerned about the promotion process and how to avoid gender stereotyping.

—Woman, Executive,
Multinational financial services

51. Groves (2007), p. 240.

DIVERSITY & INCLUSION PRACTICES

Here we provide three Diversity & Inclusion Practices from corporations and firms that have witnessed measureable results from the initiatives that they developed. These leading organizations have developed effective and inclusive talent

development strategies by minimizing the senior leadership effect, closing gaps between design and execution, and integrating checks and balances that minimize stereotyping.

SHARED RESPONSIBILITY TO MINIMIZE THE SENIOR LEADERSHIP EFFECT

PEPSICO: PEOPLE PROCESS

PepsiCo has established a very robust people process that integrates multiple HR initiatives including performance management, talent development, and career development. Key differentiating factors include: a partnership growth model in which employees, managers, and PepsiCo share responsibility for success; employment of dual performance ratings and forced distribution based on people results and business objectives; detailed guidance and communication regarding advancement; transparent accountability mechanisms including compensation tie-ins; and visible leadership involvement in the process.

PepsiCo also focuses attention on building an inclusive environment in which all employees can thrive through their people processes. For example, one of four people dimensions on which every manager is evaluated is diversity and inclusion (D&I), the company employs a diversity lens when considering slates for succession planning and pays special attention to the developmental opportunities of women and people of color, HR regularly analyzes outcomes of performance systems to ensure parity, and leadership is held accountable for contributions toward an inclusive culture and is responsible for championing various employee subgroups.

Key Objectives

- To provide the foundational tools needed for employees and managers to work together effectively.
- To ensure that employees' business and people objectives for the year are well aligned with the larger business priorities (i.e., the Annual Operating Plan or AOP), and are adjusted accordingly at mid-year review.
- To support workplace improvement efforts and the continued growth and development of employees and managers.
- To help them match employees with new opportunities.

Success Factors

Partnership Growth Model

Though HR is ultimately responsible for oversight and guiding principles, PepsiCo expects that career growth and performance management are true partnerships between employees, managers, and PepsiCo. Each stakeholder shares in the responsibility for success and is required to do his or her part.

The Impact of the Process

Part of PepsiCo's rigorous measurement process includes employees' evaluation of the performance ratings and objectives and their perceptions of the ease and fairness of the process. In 2005-2006, about 70 percent of employees reported favorable opinions or perceived confidence in the performance management system.

GUARDING AGAINST IMPERFECT EXECUTION

ERNST & YOUNG: INCLUSIVENESS ROUNDTABLE CHAMPIONS

In 2007, Ernst & Young (EY) launched the Inclusiveness Roundtable Champion (IRC) Program as part of its overall performance management process. During annual performance review meetings—called Roundtables—each business unit across the United States and Canada provides an Inclusiveness Roundtable Champion to advocate for fair and equitable annual performance ratings and the ongoing development of staff in an inclusive workplace.

IRCs actively participate in Roundtable discussions to:

- Focus the discussion on actual performance and objective business criteria.
- Listen for and redirect discussions that do not relate to objective business criteria.
- Assist in the formulation of actionable development plans for women and minority staff.

IRCs are supported by guidance from dedicated HR professionals in their local offices, as well as an Inclusiveness Roundtable Champions Workshop webcast, which provides IRCs with the information and tools they need to:

- Advocate for equitable treatment of staff during Roundtable discussions.
- Support fair and equitable ratings by providing examples of judgments on style versus behavior or outcomes.
- Include all participants in Roundtable discussions.
- Support the ongoing development of staff in an inclusive and flexible workplace.

IRCs do not “police ratings” or make sure people are highly rated. Instead, their oversight helps ensure that people are rated fairly. They guide discussions around EY’s list of global competencies—which were created to prevent evaluations based on “how things are done around here” or “how it was done last year”—and help other Roundtable participants recognize when their judgments are based on style rather than results. For example, they may step in if a person rated “4” should really be a “5” but style differences or criteria outside the firm’s established competencies have been used to evaluate him or her.

EY knows that its competitive advantage depends on its ability to leverage the differences of its people, and it has statistics that show the firm’s progress. For example, since the late 1990s, the percentage of women in top executive management positions has increased from zero to 20 percent, and five members of the Americas Executive Board are currently women (as of December 31, 2008). In fiscal year 2008, women comprise 16 percent of the total partner/principal population, up from only 5 percent of all partners/principals in 1997. Minority partners and staff represent 30 percent of EY’s total U.S. employee population, more than double the percentage from a decade ago, and the number of minority partners/principals in the United States has more than tripled since 1995. Retention of both women and minority professionals has also improved significantly.

TRANSPARENCY AS A CHECK AND BALANCE

SCOTIABANK: UNLOCKING POTENTIAL, DELIVERING RESULTS: THE ADVANCEMENT OF WOMEN (AOW) INITIATIVE 2007 CATALYST AWARD-WINNING INITIATIVE

Scotiabank's Strategy

In 2002, a diverse, cross-functional group of the most senior-level women at Scotiabank formed the Advancement of Women Steering Committee (AoW SC) because they realized that, in order to make change, the process for advancing women needed to become institutionalized. The AoW SC designed a holistic, replicable change strategy as a roadmap to advance women. A combination of transparency, rigorous accountability mechanisms, and programmatic elements is woven into the strategy and has shaped the culture at the bank.

Transparency

In response to research suggesting that women often didn't know how to navigate the bank's advancement system, Scotiabank adopted a completely transparent career advancement process, which is visible and accessible on a level playing field. Employees can now self-evaluate, gauge where they are on the career continuum, and determine what steps need to be taken in order to develop the requisite skills and experiences to be promoted to the next level. Additionally, all employees in the bank have access to overall bank numbers and progress to goal. This level of transparency is consistent with the bank's mandate to provide a consistent, high-quality employment experience for all employees, wherever they work. Transparency, ensuring a broad candidate pool, and conducting objective evaluations of candidates are three fundamental principles aligned with the AoW initiative.

Human Investment Committee

The goal of this committee, composed of the President and CEO and his direct reports, is to lead quarterly discussions on major people policies and programs, including leadership development. The SVP of Top Talent was a role formalized to ensure that the bank identifies—and develops—top talent. This senior woman mentors high-potential women and men, coaches their managers on the development of their employees, and contributes to the management of the career paths of the top 100 employees.

The Impact of the Initiative

Through this initiative, Scotiabank has significantly improved the representation of women at the senior-management level from 18.9 percent in 2003 to 31.0 percent in 2006. Representation of women at the most-senior EVP/Corporate Officer level has increased from 26.7 percent to 36.8 percent from 2003 to 2006. Employee satisfaction scores rose nine points and Return on Equity in the same period went from 16.6 percent to 22.1 percent.

CHAPTER SUMMARY

Stereotyping is often nebulous and unconscious. Therefore, it can be difficult to assess the impact of gender bias on individuals and organizations. Effectively implementing strategies that minimize the effects of individual and organizational biases on talent management systems requires a thorough understanding of the threats that place women at risk of stereotypic bias. In addition to the strategies and programs highlighted throughout this report, the recommendations and practices in this chapter are designed to help organizations tackle talent shortages and leverage diverse talent pools.



APPENDICES



APPENDIX 1 METHODOLOGY

The data for the study was collected in three primary phases.

PHASE I DATASET: INTERVIEWS

Interview Process

Research questions were developed based on a comprehensive literature review focused on gender stereotyping, performance management, career advancement, and talent development. In-depth interviews began with an overview of the purpose of the study and a verbal confidentiality agreement. The majority of the semi-structured interviews were completed by the research director leading this study and averaged about 90 minutes. Interviews were conducted in person and on the phone, depending on the location of participating organizations. All interviews were conducted in English. In the following section, we summarize the foci of the interviews with a sample of questions they addressed.

Talent Management Structure

- Describe criteria, characteristics, and/or competencies of your organization's talent or performance management system.
- Describe what tools and programs are in place (ratings, rankings, multi-rater feedback, succession-planning, high-potential).
- Are gender-stereotypic criteria present in your current performance management system?
- Are checks and balances (intentional controls) in place that guard against stereotyping? Please explain or describe. (Examples such as equity analyses and training programs were provided.)

Maintenance of Talent and Performance Management

- Who is held accountable for ensuring that talent and/or performance management processes are implemented and completed?
- How are performance management data collected and maintained? What has worked extremely well with your current talent management system? Any issues or challenges?
- How effective is the performance management system?
- How well does the performance management system guard against gender stereotyping?

Opportunities and Competencies

- How are assignments for projects, teams, and/or departments made (randomly or selectively) and at what level?
- Are women and men given equal opportunities for high-profile assignments or positions?
- Are women and men developed, evaluated, or promoted differently at your organization?
- Based on your past experiences and professional knowledge, please describe characteristics of a person with strong leadership skills. Strong technical or analytical skills? Strong administrative skills? Strong interpersonal skills?
- Do you believe that women and men have different leadership skills? Please explain.
- Do you believe that women and men have different competencies in general? Please explain.

Table 1 details the gender of interviewees by industry.

TABLE 1

Gender of Interviewees, by Industry (n=24)

Industry	Women	Men	Total
Consumer products	3	3	6
Financial services	4	1	5
Hospitality/Hotel	1	1	2
Industrial/Materials	1	1	2
Multi-industry	2	1	3
Professional services	3	3	6
Technology	3	1	4
Telecommunications	1	1	2
Total	18	12	30

Interview Data Analyses

To analyze the semi-structured interview responses, two researchers reviewed interview data as it was collected to determine if questions needed to be modified or added before conducting subsequent interviews. After all interviews were complete, each of the two researchers reviewed different interview transcripts and identified themes and strategies.

The two researchers then formed consensus on the primary themes and discussed a coding scheme. The research director developed a scheme for coding and analyzing the data and then analyzed and hand-coded participants' responses for each category. Next, the other researcher audited the hand-coded data for accuracy, discussed any potential discrepancies with the research director, and inputted the hand-coded data into the qualitative data software program. After all data were coded, content analyses and consensual qualitative research methods were used to analyze the data.

PHASE II DATASET: TALENT MANAGEMENT DOCUMENTS

Following is an overview of the documents reviewed and the thematic data analyses conducted. The documents reviewed included user manuals, roles and competencies, leadership criteria, annual

review forms by level, goal-planning forms, role calibrations for each level, and promotion criteria.

Before documents were reviewed, one of the two researchers completed a review of psychological literature on characteristics, roles, and competencies stereotypically ascribed to women and men and developed tables of stereotypical terms found in literature based on whether they were perceived as masculine or feminine (see Appendix 2). The other researcher then audited the tables and used them in the content analyses of the talent management documents that participating organizations sent to Catalyst. Once all documents were hand-coded based on prevalence of stereotypical language, the two researchers discussed the findings and integrated them with in-depth interview responses to form preliminary hypotheses.

PHASE III DATASET: CHECKLIST SURVEY DATA

Survey Respondents

We reviewed lists of top companies for diversity and inclusion, top companies by industry, and Catalyst Member Benchmarking participants to field the checklist survey to a representative sample from industry competitors of our interview participants. Table 2 details the gender of survey respondents by industry.

TABLE 2

Gender of Survey Respondents, by Industry (n=86)

Industry	Women	Men	Total
Advertising/Marketing/Communications	1	0	1
Aerospace and defense	2	0	2
Consumer products, automotive	2	0	2
Consumer products, foods/snacks	2	1	3
Consumer products, other	0	1	1
Consumer products, retail/merchandise	3	2	5
Consumer products, staples	0	1	1
Energy and utilities/Industrial/Materials	5	2	7
Financial services, banking	6	4	10
Financial services, insurance	5	1	6
Healthcare	4	1	5
Information technology	2	1	3
Media/Entertainment	1	0	1
Pharmaceuticals	4	0	4

Industry	Women	Men	Total
Professional services, accounting	5	0	5
Professional services, consultation	1	1	2
Professional services, law	7	2	9
Real Estate	1	0	1
Telecommunications	2	0	2
Industry unknown because respondents did not answer			16
Total	53	17	86

Checklist Survey Items

The checklist items focused on leadership characteristics, talent/performance management processes (annual performance reviews and talent development programs), gender diversity and inclusion (dimensions of diversity and opportunities for advancing women), and next steps. Survey participants were asked to complete the data

based on their current organization. We also gathered demographic data to analyze checklist survey responses according to organizational and participant demographics.

Table 3 displays the gender of interview participants and survey respondents by level.

TABLE 3

Gender of Interviewees and Survey Respondents, by Level

Level	Women	Men	Total
Executive/Senior management	32	15	47
Mid-level manager	23	10	33
Pre-manager	12	2	14
Other (e.g., consultant)	4	2	6
Level unknown because respondent did not answer			16
Total	71	29	116

Table 4 provides a breakdown of participating corporations and firms by type. Of the 100

corporations and firms that self-identified, 55 percent were from the *Fortune* 1000.

TABLE 4

Participating Corporations and Firms, by Type

Type	Number of Corporations and Firms
<i>Fortune</i> 500	47
<i>Fortune</i> 501-1000	8
<i>Forbes</i> top companies	10
Professional services firms	12
Privately held companies	10
Publicly held companies not in <i>Fortune</i> 1000	13
Anonymous ⁵²	10
Total	110

52. Survey respondents were given the option to participate anonymously. Based on the distribution list, it is most likely that the majority of the anonymous organizations were members of the *Fortune* 500.

Final Data Analyses

We integrated data from interviews, talent management documents, and checklist survey responses to understand relationships among gender diversity, stereotyping behaviors, leadership competencies/characteristics, and talent management systems. Throughout data collection and analyses, the two researchers worked with selected⁵³ interview participants to test hypotheses and assumptions and establish consensus on findings for each phase of the research.

The two researchers independently determined how datasets from the three phases were related and developed an outline of the storyline. The researchers then reconvened and established

consensus on salient findings of the study. The researchers drafted a written document delineating how the findings interacted with one another and formed the learnings for this report.

Next, the written document of research findings was vetted internally by members of Catalyst's Research department. This feedback was used in a subsequent meeting where experts throughout all business units of Catalyst convened and collaborated on formalizing the findings and next steps. The primary researchers collaborated with members of Catalyst's Organizational Change & Effectiveness research team and the Vice President, Research, to finalize data for the report.

53. For this phase of the study, participants were selected based on their availability to discuss preliminary findings.

APPENDIX 2: A GUIDE FOR EVALUATING GENDER-STEREOTYPIC LANGUAGE

To evaluate the potential presence of gender-stereotypic language in data collected for this study, Catalyst developed the following tables. Specifically, these tables were used to guide qualitative and quantitative analyses. The tables are

based on Catalyst’s report, *Women “Take Care,” Men “Take Charge:” Stereotyping of U.S. Business Leaders Exposed*⁵⁴ and an extensive review of psychological research on gender-stereotypical behaviors of women and men.⁵⁵

TABLE 5
Stereotypically Feminine Attributes

Characteristics	Roles	Competencies
Affectionate	Caretaker	Caretaking
Cheerful	Communicator	Child-rearing
Childlike	Cook	Communicating
Collaborative	Daughter	Consulting
Compassionate	Helper	Decorating
Delicate	Homemaker	Inspiring
Feeling	Listener	Linguistic
Gentle	Mother	Listening
Gullible	Secretary	Mentoring
Incompetent	Sexual object	Multitasking
Inhibited	Shopper	Networking
Kind	Sister	Organized
Loyal	Soother	Relational
Nurturing	Teacher	Rewarding
Passive	Wife	Soothes hurts
Pretty		Team-building
Sensitive		
Shy		
Soft-spoken		
Soothing		
Supportive		
Sympathetic		
Tender		
Understanding		
Warm		
Weak		
Yielding		

TABLE 6
Stereotypically Masculine Attributes

Characteristics	Roles	Competencies
Active	Adventurer	Analytical
Aggressive	Breadwinner	Athletic
Ambitious	Brother	Decisive
Assertive	Defender	Defends beliefs
Brave/Risk-taker	Disciplinarian	Delegating
Competitive	Explorer	Gets results
Commanding	Father	Influencing upward
Decisive	Fireman	Leading
Dominant	Husband	Logical
Egotistical	Innovator	Mechanical
Forceful	Intellectual	Objective
Independent	Leader	Physically strong
Individualistic	Manager	Problem-solving
Intellectual	Protector	Reasoning
Moral	Provider	Technical
Objective	Repairer	
Proud	Son	
Self-assured	Soldier	
Self-reliant	Worker	
Self-sufficient		
Stoic		
Strong		
Success-oriented		
Trustworthy		
Unemotional		
Uninhibited		
Virile		

54. Catalyst, *Women “Take Care,” Men “Take Charge:” Stereotyping of U.S. Business Leaders Exposed* (2005).

55. While the term visionary has been associated with women and men, research by Grove (2006) suggests that the term tends to be more stereotypically feminine than masculine. The term visionary was not included in the chart because psychological research examining gender stereotypes associated with the term are limited.

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