

# 2003 Catalyst Member Benchmarking Report



## **ABOUT CATALYST**

Catalyst is the leading research and advisory organization working to advance women in business, with offices in New York, San Jose, and Toronto. As an independent, nonprofit membership organization, Catalyst uses a solutions-oriented approach that has earned the confidence of business leaders around the world. Catalyst conducts research on all aspects of women's career advancement and provides strategic and web-based consulting services on a global basis to help companies and firms advance women and build inclusive work environments. In addition, we honor exemplary business initiatives that promote women's leadership with our annual Catalyst Award. Catalyst is consistently ranked No. 1 among U.S. nonprofits focused on women's issues by The American Institute of Philanthropy.

## 2003 CATALYST MEMBER BENCHMARKING REPORT

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NEW YORK 120 Wall Street, 5th Floor, New York, NY 10005-3904; (212) 514-7600; (212) 514-8470 fax

SAN JOSE 2825 North First Street, Suite 200, San Jose, CA 95134-2047; (408) 435-1300; (408) 577-0425 fax

TORONTO 8 King Street East, Suite 505, Toronto, Ontario M5C 1B5; (416) 815-7600; (416) 815-7601 fax

**email: [info@catalystwomen.org](mailto:info@catalystwomen.org); [www.catalystwomen.org](http://www.catalystwomen.org)**

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## TABLE OF CONTENTS

<b>Introduction</b>	<b>1</b>
<b>Diversity Engagement and Workforce Statistics</b>	<b>4</b>
<b>Global Diversity and Inclusion</b>	<b>10</b>
<b>Diversity Education and Training</b>	<b>15</b>
<b>Women of Color/Visible Minority Women</b>	<b>20</b>
<b>Workplace Flexibility</b>	<b>24</b>
<b>Business Travel and Relocation Policies</b>	<b>29</b>
<b>Conclusion</b>	<b>33</b>
<b>Acknowledgments</b>	<b>34</b>
<b>Appendix: Public Benchmarking Participants (Partial List)</b>	<b>35</b>
<b>Catalyst Board of Directors</b>	<b>36</b>



## INTRODUCTION

Catalyst members are part of a leading group of companies and firms dedicated to diversity and the advancement of women. Our member organizations can better capitalize on the talents of all their employees by comparing their diversity initiatives and progress with “best-in-class” employers. Our annual benchmarking service provides participating Catalyst members with data that shows how their organizations’ policies and programs stack up against those of other leading organizations across industries and regions. There are six issue-specific sections included in this report: diversity engagement and workforce statistics; global diversity and inclusion; diversity education and training; women of color/visible minority women; workplace flexibility; and business travel and relocation policies. At the end of each section, Catalyst provides action steps and resources that organizations can use to effectively address these issues.

### Profile of Respondents

In the winter of 2003, Catalyst sent surveys to all 287 member organizations. We received 129 completed responses for a 45-percent response rate. A list of all participants who agreed to be recognized publicly is available in the Appendix on page 35.

Profile of Respondents	
<b>Total Catalyst Member Respondents</b>	<b>129 (45-percent response rate)</b>
<b>By Headquarters Country</b>	
Canada	17 (13 percent)
Europe	8 (6 percent)
United States	104 (81 percent)
<b>By U.S. Region</b>	
Midwest	21 (20 percent)
Northeast	40 (39 percent)
South	20 (19 percent)
West	23 (22 percent)
<b>By Type of Organization</b>	
Corporation	108 (84 percent)
Professional firm	20 (16 percent)
Government agency	1 (<1 percent)
<b>By Catalyst Award Winners<sup>1</sup></b>	
Catalyst Award-winning participants	21 (16 percent)
Other participants	108 (84 percent)

<sup>1</sup> See box on page 2 for more information about the Catalyst Award.

### Catalyst Award-Winning Organizations

The Catalyst Award is presented annually to companies and firms with outstanding initiatives that result in women's career development and advancement. Catalyst's rigorous, yearlong examination of initiatives and their measurable results culminates in intensive, on-site reviews at finalist organizations. The Catalyst Award provides the business community with replicable success models that are good for business and good for women.

The Catalyst Award criteria are hallmarks of successful change initiatives: integration with business strategy, senior leadership commitment, effective communication, accountability, and measurable results. In addition, replicability and originality are evaluated in Catalyst Award-winning initiatives.

### Key Findings

- **Diversity engagement:** Commitment to diversity is not filtering down throughout member organizations. While 42 percent of members report their senior executives are "very engaged" in diversity efforts, less than one in ten agree that mid-level managers and first-level employees are as engaged.
- **Workforce statistics:** For the first time, we collected data on management committee representation. We found that white men comprise 75 percent, white women 18 percent, men of color 6 percent, and women of color 2 percent of the senior-most decision-makers.
- **Global diversity and inclusion:** Of the 108 member organizations that have offices or operations outside their headquarters country, 48 percent (49 companies) have global/worldwide diversity and inclusion efforts. We also asked about which diversity dimensions global members address worldwide, as well as in five geographic regions where these organizations have offices or operations. Gender is the most frequently cited dimension of diversity addressed worldwide and in all five listed regions. Nationality is the second most common diversity dimension addressed globally and in four of the five regions. The exception is the U.S./Canadian region, where race/ethnicity topped the list.
- **Diversity education and training:** Nearly all member organizations have some sort of diversity education or training and rate it as "generally effective." However, only 13 percent rate it as "very effective."
- **Women of color:** After nearly seven years since Catalyst began studying the unique issues and experiences of women of color in corporate management, few organizations have targeted efforts for this important employee group. Only 33 percent of participating members have any kind of programs or initiatives focused on women of color.
- **Workplace flexibility:** The majority of members report having at least one workplace flexibility policy and that their efforts are "generally effective." However, few members report that their workplace efforts are "highly effective."
- **Business travel and relocation policies:** Many Catalyst members have witnessed a decrease in travel among their managers and executives in recent years and are experimenting with alternatives to travel and relocation. Few organizations provide tools and resources for communicating across borders and adequately support expatriates and their families on international assignments.

## *Key Questions*

As you review the benchmarking data in this report and compare them to your own data, keep in mind the following questions:

### **Where are you leading the way?**

- ❶ Have you effectively communicated this program or initiative internally and externally?
- ❷ How can you leverage this strength?

### **How effective are your efforts?**

- ❶ Is the program or activity achieving its goals?
- ❷ Are you adequately measuring effectiveness?
- ❸ Are there ways to refine or improve?

### **What are you missing?**

- ❶ Have you asked relevant employee groups if this is an activity they want or need?
- ❷ How can you make the case for implementing this activity?

## DIVERSITY ENGAGEMENT AND WORKFORCE STATISTICS

Gathering data about and from your workforce can be a powerful method to illustrate your organization's current state and establish a baseline for measuring progress. As you review your organization's data, keep in mind the following questions:

- How does the composition of your executive or management committee compare to that of your recruiting pool? At what point does the proportion of white women, men of color, or women of color drop off?
- What is the demographic make-up of your new hires? How does that benchmark with your industry peers and other Catalyst member organizations?
- Do white women, women of color, and men of color leave the organization at higher rates than white men? If so, where is the differential rate of turnover most pronounced?
- Are you recruiting women into your organization at the same rate as men but losing women at a greater rate? Or are women and people of color staying, but getting stuck in the middle of the organizational hierarchy?

The data resulting from these questions are just the beginning. Additional research—such as performance review analysis, employee survey results, exit interviews, and focus groups—will isolate the underlying issues and guide the identification of solutions.

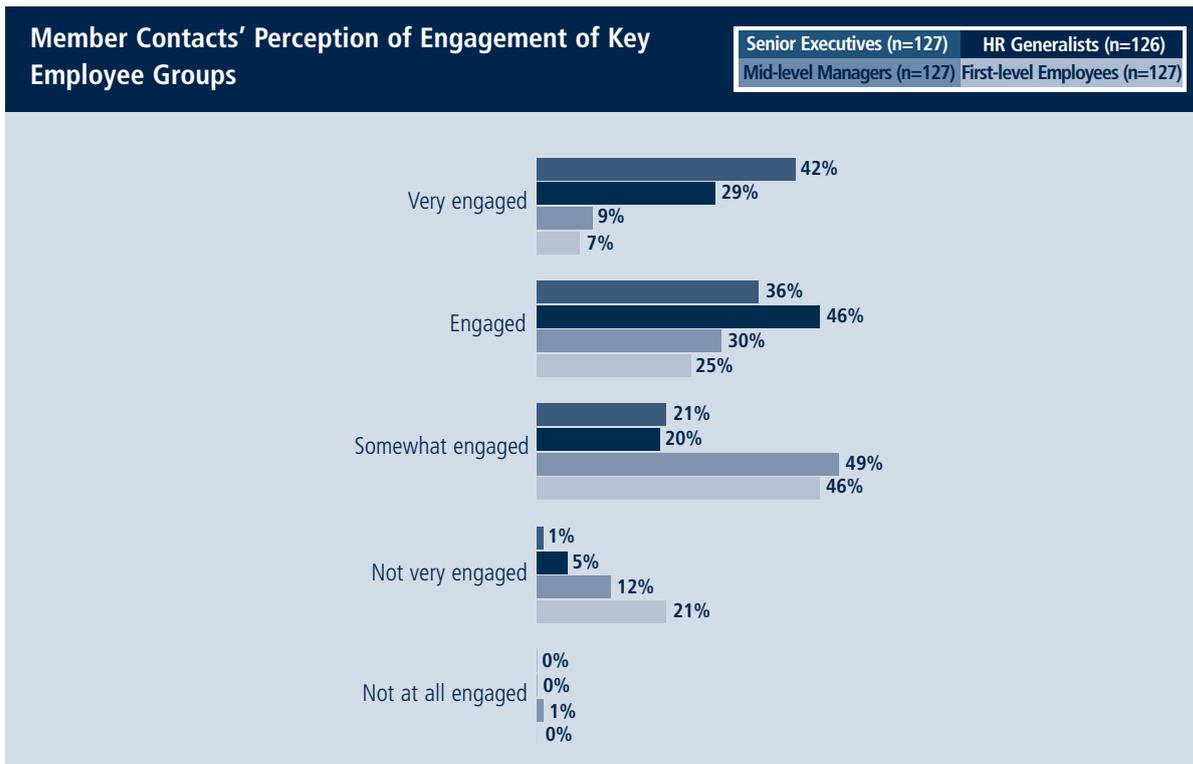
### Key Findings

- Commitment to diversity is not filtering down throughout member organizations. While 42 percent of members report their senior executives are “very engaged” in diversity efforts, less than one in ten agree that mid-level managers and first-level employees are as engaged.
- For the first time, we collected data on management committee representation. We find that white men comprise 75 percent, white women 18 percent, men of color 6 percent, and women of color 2 percent of the senior-most decision-makers in member organizations.

### Diversity Engagement

Assessing employee engagement around diversity and inclusion issues by level sheds light on the extent to which different employee groups are committed to diversity. These data are self-reported by member contacts, who are largely comprised of diversity professionals.

It is encouraging that 42 percent of participating members believe their senior executives are very engaged around diversity and inclusion issues. In contrast, 29 percent believe HR generalists are very engaged, 9 percent believe middle managers are very engaged, and 7 percent believe first-level employees are very engaged. These findings suggest that diversity engagement is not permeating member organizations. Award-winning respondents report higher percentages of diversity engagement across all employee groups compared to other participants.



**Senior executives:** 62 percent of Award-winning participants say their senior executives are very engaged, compared to 37 percent of other participants. Catalyst finds that senior leadership commitment is essential to making change, and senior managers can range from being diversity champions to being impediments to change.

**HR generalists:** Award-winning participants are more likely to report highly engaged HR generalists than other participants (57 percent and 23 percent, respectively). HR generalists are the front line whose efforts reach large numbers of people in an organization. Therefore, the support of human resources on the ground is essential for diversity or flexibility initiatives to be successful. One of the main challenges in engaging HR generalists is that they have multiple priorities and are often overworked and understaffed.

**Mid-level managers:** Even Catalyst Award winners appear to be struggling with engaging mid-level managers, as compared to other participating organizations (24 percent and 6 percent, respectively). One possible explanation is that mid-level managers may experience the most immediate threat from extending perceived advantages to specific sub-groups of employees.

**First-level employees** also pose a significant challenge to member organizations' commitment to diversity. Nineteen percent of Award winners say first-level employees are very engaged, compared to 5 percent of other participants. Diversity efforts do not appear to have penetrated throughout the lower levels of member organizations.

### Mid-Level Manager Engagement Efforts

Because Catalyst often hears that engaging middle managers is a significant challenge, we asked members what mechanisms they have used to get managers on board. We find that participants who report that their middle managers are engaged are more likely to have provided all of the activities listed on the following page than those with less engaged managers. In particular, 55 percent of respondents who report having engaged managers tie compensation to diversity efforts, compared to 30 percent of other participants.

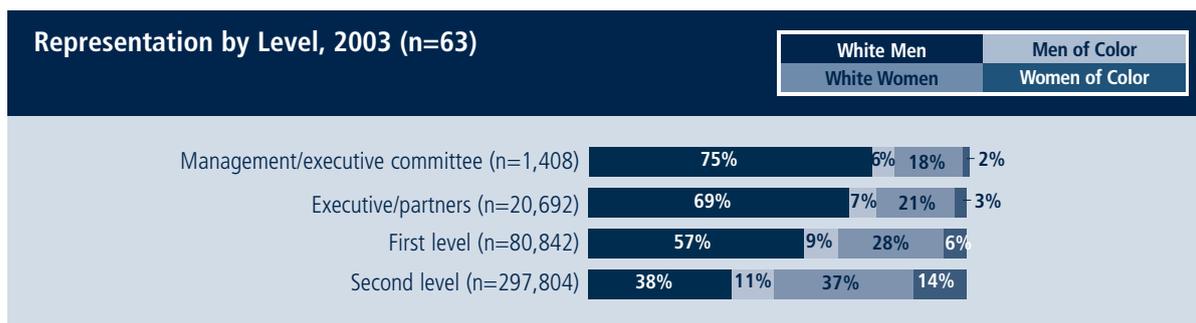
Activities to Engage Mid-Level Managers	Percent of Total Respondents (n=129)	Percent of Respondents with Engaged Managers* (n=49)
Incorporate diversity in management and leadership training	67%	86%
Provide targeted diversity training	63%	88%
Demonstrate senior leadership commitment through frequent communication	60%	78%
Assess employee engagement regularly through employee surveys, interviews, and/or focus groups	46%	61%
Tie managers' compensation to diversity efforts	30%	55%
Connect diversity business case to individual manager's team performance	22%	35%
Provide 360-degree feedback to managers on diversity efforts	20%	27%
Other	3%	2%

\*Respondents who reported mid-level managers are very engaged or engaged

### Workforce Statistics

**Representation by Level:** Looking at representation by level, there isn't proportionate representation from the second level below executives<sup>2</sup> or partners up to the management/executive committee.<sup>3</sup> While white men represent 38 percent of the second level below executive/partner, they comprise 75 percent of the management committees. Conversely, the proportions of white women, men of color, and women of color decline considerably going up the career ladder.

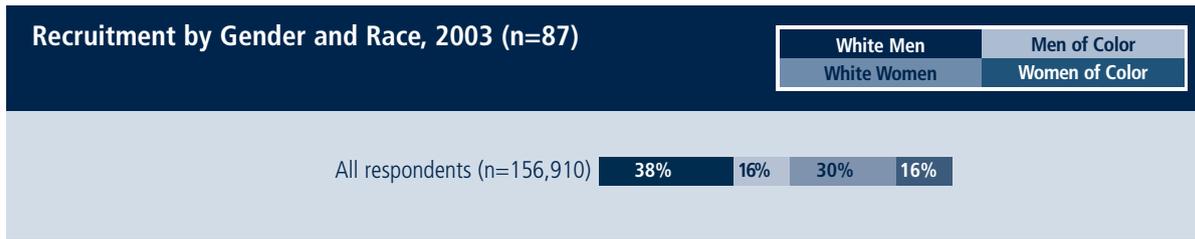
At the executive level, there has been little change since 2001, when 69 percent of executives were white men, 10 percent men of color, 18 percent white women, and 3 percent women of color (n=77). There are no meaningful differences between Catalyst Award winners and other participants.



**Recruitment:** Comparing the diversity of the employees your organization hires with the demographics at the top of the organization can paint a powerful picture. Among participating members that provided recruitment data, new hires are comprised of 38 percent white men, 30 percent white women, 16 percent men of color, and 16 percent women of color. These proportions are identical to 2002, the first year this data was collected.

<sup>2</sup> "Executives" refers to senior managers who have been formally designated as executives by a company. Catalyst recognizes that companies define "executive" differently, but the role has resonance across companies and industries and is therefore a useful benchmark. For example, top 100 executives, Vice President level and above, and within two reporting levels of the CEO.

<sup>3</sup> "Executive or Management Committee" refers to the senior-most executives in a company who set the strategic direction of the company.



Combining the categories, slightly more than one-half of all new recruits in participating organizations are men (54 percent). About one-third of new hires are people of color (32 percent).

Award-winning participants compare closely with other participating members on recruitment figures, although they have somewhat higher percentages of women-of-color new hires. Women of color comprise 22 percent of new hires at Award-winning companies, compared to 16 percent at other participating members.

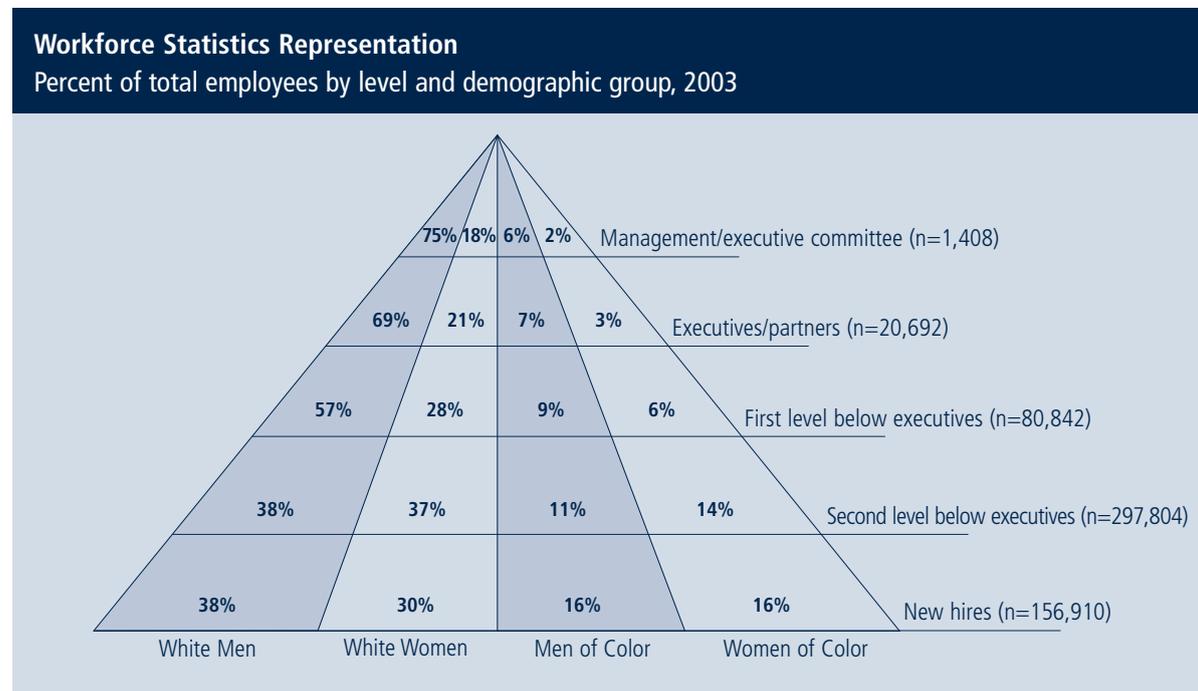
**Attrition Rates:** The voluntary attrition rate tracks how successfully your organization is retaining employees from key demographic groups.<sup>4</sup> At the management/executive committee level, white men and women of color have the highest voluntary turnover rates (7 percent and 8 percent, respectively). These data cannot reveal whether this is a natural result of retirement or a sign that should warrant concern. Attrition rates appear to be comparable for the four demographic groups among executives/partners and one level below. At the second level below executives/partners, women of color have the highest turnover rate (17 percent), which may explain why their representation at the next level declines substantially.



A pyramid provides a visual snapshot of what the available talent pipeline is and where certain employee segments drop off on the way to senior leadership positions. Looking at this pyramid, it becomes obvious that white men are the only group that increases by level. The drop-off for white women and men of color appears to happen gradually among participating members, while the percentage for women of color declines sharply between the first and

<sup>4</sup> The attrition rate can be calculated in multiple ways, e.g., based on the starting representation, end of period representation, or average representation for a given period. Because companies calculate this figure differently, there are limits to comparability across companies.

second levels below executives/partners (from 14 percent to 6 percent).<sup>5</sup> This is reinforced by the attrition data, which shows a high percentage of women of color leaving at the second level below executive. Catalyst’s research shows that women of color tend to advance in their careers by leaving their current employers.<sup>6</sup>



**Catalyst Expert Point of View: Why Are Workforce Statistics Important?**

**Brian Welle, Ph.D., Director, Research**

Catalyst believes in the power of data. Very often, issues of diversity—such as the representation of women and people of color in key positions, and the experiences and attitudes of different segments of the workforce—are mired in ambiguity. We think we know what the important issues are and where to focus resources to improve the work environment, but Catalyst finds that all too often, our intuition is wrong. Collecting important data by counting, surveying, tracking, and asking questions, is the first step in the journey from relying on conjecture to forming a strategy based on facts.

Quantitative data represent an important tool for understanding an organization’s workforce. A static picture of an organization is presented when the current representation of the workforce is assessed, with key demographic groups (including gender, race/ethnicity, and other groups of relevance for the organization) broken out for each level, business unit, and job function. The resulting picture allows one to identify which areas of the organization are lagging behind expectations, and where “glass ceilings” may exist.

A dynamic view of the organization is obtained when metrics are used to track changes in representation over time. This requires a commitment to continually analyzing HR data to identify trends and patterns, and to establishing a baseline to monitor future progress. It also allows one to monitor the flow of talent through the organization—from employees first joining the organization to those ascending to leadership ranks. Understanding the demographic make-up of the “incoming” class allows an organization to understand where its talent is coming from, while the attrition rate lets it know where the pipeline may be blocked or leaking.

Of course, gathering and analyzing data will not, in and of themselves, lead to change. However, metrics are tools that drive change by encouraging accountability, measuring progress over time, and maintaining momentum.

<sup>5</sup> In order to provide a benchmark for pipeline levels, we asked members to identify the first three levels directly below the executive level using whatever terminology is most relevant to their organizations, e.g., band, job grade, or title.

<sup>6</sup> Catalyst, *Women of Color in Corporate Management: Three Years Later* (2002).

## Catalyst Action Steps

The data presented here begin to tell the story of what is happening for different demographic groups in Catalyst member organizations. More information is needed to uncover the underlying issues behind these numbers and develop strategies for making change. The following steps will help you gather this information.

- **Assess and engage key stakeholder groups.** Employee surveys, interviews, and focus groups are tools for assessing diversity engagement by demographic group and level. This data will point to the key employee groups at which you should target engagement activities. The business case must be made relevant to these employees and coupled with accountability measures to ensure adoption of inclusive behaviors. To engage executives, one-on-one coaching can be a transformational experience. For example, through reciprocal mentoring, a more junior woman or person of color can share their first-hand experiences with a white male executive.
- **Gather additional assessment data.** It is often important to cut all data by division, geography, and function, as appropriate. Other metrics to consider are promotion rates, time in position, participation in key programs, employees who hold key line leadership roles, international assignments, or serving on important task forces or committees. To understand what is behind the numbers, employee perceptions can be surfaced through interviews, exit interviews, focus groups, and employee surveys.
- **Create a diversity scorecard.** A scorecard is an ongoing measurement system that provides a snapshot of progress on key metrics. All metrics should have clear rationales and reflect issues relevant to the organization that will help it to focus its resources of time, money, and effort. Each metric should be directly tied to actions or programs designed to bring about the change it sets out to measure.
- **Hold executives and managers accountable for progress on key metrics.** Tie desired outcomes to day-to-day behaviors of employees. Front-line managers, senior executives, and human resources professionals are among those whose performance can be linked to making progress on diversity measures. If you are considering tying compensation to achievement of diversity objectives, a good rule of thumb is that at least 25 percent of variable compensation must be tied to any single criterion in order to make a difference in behavior. Diversity objectives might be part of an overall “people management” category, which is then linked to compensation.

## Catalyst Resources

### Tools

Catalyst Spectrum,<sup>SM</sup> a web-based service assisting organizations in the development of diversity strategies

### Publications and Factsheets

Quick Takes: Labor Force, Population, & Education (2004)

*2003 Catalyst Census of Women Board Directors of Canada* (2004)

*2003 Catalyst Census of Women Board Directors* (2003)

*2002 Catalyst Census of Women Corporate Officers and Top Earners of Canada* (2003)

*2002 Catalyst Census of Women Corporate Officers and Top Earners of the Fortune 500* (2002)

*Making Change: Assessing Your Work Environment* (2002)

*Making Change: Developing a Diversity Recruitment Strategy* (2002)

*Making Change: Tackling Resistance to Diversity Efforts* (2002)

*Making Change: Using Metrics to Support Workforce Diversity* (2002)

## GLOBAL DIVERSITY AND INCLUSION

Whether an organization is just starting to explore international markets or is building on a long tradition of globalization, customers and clients from all over the world are providing increasing contributions to the bottom line. The majority of last year’s participants cited global diversity and inclusion as the topic they would like covered in this year’s survey. Recognizing that not all Catalyst’s members are global, we included an addendum to the core survey to begin addressing how to take diversity and inclusion efforts across borders. There are no meaningful differences between Catalyst Award winners and other respondents with regard to global diversity and inclusion.

### Key Findings

Of the 108 respondents who have offices or operations outside their headquarters country, 48 percent (49 organizations) have global/worldwide diversity and inclusion efforts. We also asked what diversity dimensions global members address worldwide as well as in five geographic regions where these companies have offices or operations. Gender is the most frequently cited dimension of diversity worldwide and in all five listed regions. Nationality is the second most common diversity dimension addressed globally and in four of the five regions. The exception is the U.S./Canadian region, where race/ethnicity topped the list.

### Geographic Scope

Eighty-four percent (108) of participating members have offices or operations outside their headquarters country. Of those global members who responded, 48 percent have a global approach to diversity. Thirty percent currently have diversity efforts only in headquarters, with 21 percent intending to expand in the future. Seventeen percent have local activities within specific countries.

Geographic Scope of Diversity and Inclusion Efforts (n=103)	Percent of Respondents
Global, worldwide	48%
Headquarters only, expand in the future	21%
Headquarters only, no plans to expand	9%
Regional (within specific regions)	6%
Local (within specific countries)	17%

These data do not allow us to ascertain whether the geographic scope of inclusion efforts is deliberate or happenstance. A grassroots approach by seeding local initiatives can be a strategic decision and a corporate-driven initiative can be due to the absence of local champions. To a certain extent, these responses reflect that the majority of respondents are headquartered in the United States where the legal and social environment has necessitated diversity efforts.

### Global Diversity Structure

The top three responses on the current structure of the global diversity function all involve a central, corporate team interacting with regional or business unit offices. Forty-eight percent of global members structure the central team as a resource for regions to customize their own strategies. More than one-third (39 percent) have corporate-wide global policies and programs, and one-quarter (26 percent) hold regions accountable for results. Few global members have decentralized efforts within business units or regions.

Structure of Diversity Function Globally (n=108)	Percent of Respondents
Central, corporate team provides expertise and supports for local customization	48%
Central, corporate team works on corporate-wide policies and programs	39%
Central, corporate team holds regions and businesses accountable (e.g., requires diversity plans, reviews progress regularly)	26%
Separate corporate teams focus on specific dimensions of diversity globally (e.g., women only, work/life only)	18%
Decentralized within business units	6%
Decentralized within regions	10%
Other	6%
No resources dedicated to diversity globally	9%

Members with global operations appear to be divided in the relationships they envision between headquarters with regions and business units. Looking to the future, 40 percent of global members plan on requiring regions and business to implement corporate diversity policies and programs, while 31 percent will encourage, but will not require, diversity activities. Another 29 percent will require their regional operations to undertake diversity activities, but will allow them to customize the approach. Only 19 percent of global members plan to provide corporate funding for regional efforts.

Future Global/Corporate and Region/Business Unit Relationship (n=108)	Percent of Respondents
Require regions/businesses to implement corporate-wide diversity policies and programs	40%
Encourage region/business unit to fund their own diversity activities	35%
Encourage, but not require, region/business units' diversity activities	31%
Require regions/businesses to develop diversity policies and programs without specifying approach	29%
Provide corporate funding for region/business units	19%
Other	13%

### Corporate Diversity Supports to Regions

Approximately three-quarters (78 percent) of global members provide expert advice and share internal best practices and information to regions and business units, which is an important and logical role for corporate headquarters. Global members also arm regions and business units with data through external benchmarking data, employee surveys, and other assessment data. More than one-half of global members provide opportunities to participate in internal roundtables, organization-wide diversity taskforces, and external roundtables. Only 23 percent offer opportunities to participate in internal conferences, which has been an important early step for some companies' global diversity efforts.

Corporate Supports to Regions and Business Unit Diversity Efforts (n=108)	Percent of Respondents
<b>Tools and Supports</b>	
Expert advice from central corporate teams	78%
Services of consultants	56%
Communication tools	52%
Tools to develop customized diversity strategies (locally, regionally, and business unit level)	40%

continued on next page

Corporate Supports to Regions and Business Unit Diversity Efforts (n=108) (continued)		Percent of Respondents
<b>Information and Data</b>		
Internal best practices and information sharing across lines of business		74%
Access to external benchmarking data		69%
Employee satisfaction surveys and other assessment methods		63%
Intranet-based information resources		61%
<b>Participation Opportunities</b>		
Opportunities to participate in internal roundtables		60%
Opportunities to participate in organization-wide diversity taskforces		55%
Opportunities to participate in external roundtables		53%
Opportunities to participate in internal conferences		23%
<b>Training</b>		
Optional diversity training		47%
Required diversity training		35%
<b>Funding</b>		
Funding for diversity activities (particular activities not specified)		43%
Funding for diversity activities (particular activities mandated)		23%

### Dimensions of Diversity by Region

Global members were asked which dimensions of diversity they address globally and, within five listed geographic regions, where they have offices or operations. Across all regions of the world, the most frequently cited dimension of diversity is gender. It is not surprising that the highest percentage of global members address gender in their U.S. and Canadian operations (82 percent). More than one-half (57 percent) of global members address gender issues globally, and another 45 percent focus on gender in their European offices.

Nationality is the next most frequently cited dimension addressed by global members in all regions except U.S./Canada. One-third of global members focus on nationality worldwide. Race/ethnicity was the second most frequent in the U.S./Canada (80 percent), and 31 percent of global members target race worldwide. It is important to note that the majority of participating members are headquartered in the United States.

Dimensions of Diversity Global Members Address by Region in Which They Operate (n=108)						
	Global	Asia/ Pacific Islands	Europe	Mexico & Latin America	Middle East/ Africa	U.S. & Canada
Gender	57%	41%	45%	38%	30%	82%
Nationality	33%	21%	26%	22%	19%	42%
Race/ethnicity	31%	16%	24%	15%	15%	80%
Age/generation	30%	13%	23%	14%	8%	50%
People with disabilities	30%	16%	25%	18%	12%	58%
Sexual orientation	29%	10%	24%	11%	9%	56%
Religion	17%	7%	15%	10%	7%	32%
Not applicable	14%	11%	13%	15%	19%	0%
Other	2%	8%	6%	1%	0%	7%

### Catalyst Expert Point of View: Why Should Organizations Focus on Global Diversity and Inclusion?

Emma Sabin, Director, Advisory Services

From the perspective of global leaders, the topic of global diversity and inclusion is often mistaken as synonymous with cross-cultural communications. While global diversity and inclusion encompasses this issue, it addresses a much greater challenge to business. In the ever-growing global economy, underlying problems of poverty, inequality, and economic insecurity can cause a backlash against foreign business interests in virtually any country when domestic economies seem to flounder. Global organizations need to utilize local talent and respect local cultures.

Businesses that proactively seek to tap talent from all of the distinct populations, and not just the educated elite of each nation, or import executives from the headquarters country, are embarking on an important diplomatic journey to build good faith. In the broadest sense, global diversity and inclusion means systematically developing and utilizing talent across nationality, gender, age, socioeconomic status, and other variables that have historically been fixed in defining a given country's workforce.

The specific business case or opportunities for global diversity and inclusion are different for each country, industry, and unique business organization. All businesses, however, share some common realities: the global labor force is in constant flux as members of populations age or grow younger; women attain higher levels of education; and governments relax borders for migration and immigration. These changes in the labor force then create further market opportunities. Businesses that make early adjustments to leverage the best of the new workforce are at a distinct competitive advantage.

There is no one right approach to global diversity and inclusion. The right way to launch a global diversity and inclusion strategy is largely dependent on the unique culture of the business, its particular business case for diversity and inclusion, and on the level of autonomy each of the business units or geographic locations have. As the data in this section shows, gender and nationality are diversity dimensions that transcend culture and therefore are a logical place to begin the structural and strategic process for building a globally inclusive workplace culture. In the end, each organization should strive to have its own definition of diversity and inclusion that resonates for all its employees worldwide.

### Catalyst Action Steps

Taking diversity and inclusion efforts across borders is no small task. The following are recommendations on how to start off on the right foot.

- **Identify the relevant dimensions of diversity for your organization by region.** You can collect as many definitions of the concept and meaning of diversity as the number of people you ask to define it. Because of this opportunity for miscommunication, it is important that organizations seeking to leverage their existing workforce diversity and build more inclusive workplace environments start their journey with a common definition of diversity. This definition will need to be unique and meaningful to the culture of the organization, as well as to its vision for the future.
- **Build a global fact base.** Collect data globally to identify the core issues that transcend culture as well as the differences by country. These data can inform both global and local strategies and implementation. HR data and survey results can be supplemented by interviews, focus groups, and other data collection mechanisms. In addition, organizations can create a global business case for diversity, which is then customized by local offices.
- **Consider piloting global diversity efforts with gender-based initiatives.** Because gender is the most frequently identified diversity dimension, addressing it is an appropriate first step to develop a global diversity

strategy. The types of programs and strategies designed to better recruit, retain, and advance women will also benefit other identity groups throughout the organization. The key is to ensure that all talent is being developed systematically. Also, it is wise to start small when going global by piloting the initiative in a few regions or country offices.

- **Kick off efforts with a global conference.** Bringing women leaders together from around the world is particularly helpful for those who feel isolated in their particular offices. Participants can network with each other, raise concerns and barriers, and brainstorm solutions. Senior leaders can hear the issues faced by women around the world. The participants can then go back to their home offices armed with information and resources needed to make change.
- **Convene global and local taskforces.** The taskforces are charged with investigating the issues, crafting a strategy, and implementing change. A central, global team can work in tandem with targeted councils, such as those focused on geographic, business unit, specific constituencies (e.g., gender, nationality), or type of programs (e.g., recruiting, workplace flexibility). The teams should form a partnership between human resources and influential line leaders, and represent a wide array of employees.
- **Provide tools and resources for local efforts.** Headquarters offices can leverage economies of scale to collect internal and external benchmarking, employee survey, and business case data. In addition, a central office is a logical hub for coordinating the sharing of internal and external best practices and concrete tools with local champions.
- **Balance a global and local approach to diversity and inclusion.** Effective global organizations tend to have concurrent top-down and bottom-up, global and local approaches to change. The senior leadership sets the vision and holds geographic and business units accountable for progress. The global diversity and inclusion function sets direction, vision, and coordination. Local offices customize and implement strategies, focusing on the diversity issues most relevant to them.

## Catalyst Resources

### Tools

Catalyst Spectrum,<sup>SM</sup> a web-based service assisting organizations in the development of diversity strategies

### Publications and Factsheets

Quick Takes: Global Women (2004)

Quick Takes: Canadian Women (2004)

Quick Takes: Latin American Women (2004)

*Leaders in a Global Economy: A Study of Executive Women and Men* (2003) with the Families and Work Institute and Boston College Center for Work & Family

*Women in Leadership: Comparing European and U.S. Women Executives* (2003)

*Women in Leadership: A European Business Imperative* (2002) with The Conference Board Europe

*Breaking the Barriers: Women in Senior Management in the UK* (2000) with Opportunity Now

*Passport to Opportunity: U.S. Women in Global Business* (2000)

## DIVERSITY EDUCATION AND TRAINING

When Catalyst queried a sampling of members in interviews about what they were interested in learning about from this year’s benchmarking survey, many members wanted to understand the depth and breadth of the education activities in which their peers are engaged.

### Key Findings

Nearly all members have some sort of diversity education and training, and most rate them as “generally effective.” However, only 13 percent would rate them as “very effective.”

### Diversity Education Programs

Ninety-two percent of participating members have diversity education in some part of their organizations, with 77 percent offering corporate-wide programs. Furthermore, 55 percent of members offer a combination of centralized and decentralized diversity education programs with corporate-wide, regional, and business-unit-generated programs.

Diversity Education Programs by Organizational Level (n=129)	Percent of Respondents
Corporate level	77%
Lines of business	76%
Geographic regions	67%
None	8%

More than two-thirds (69 percent) of members have mandatory diversity training for one or more employee groups. One-third of members have mandatory diversity training for all employees, with another one-third requiring it for managers, new hires, and executives. Furthermore, almost one-half (43 percent) of Award-winning participants have mandatory training for all employees, compared to one-third (33 percent) of other participants.

Respondents with Mandatory or Voluntary Training by Employee Group (n=129)		
Employee Group	Mandatory	Voluntary
All employees	35%	42%
Managers	36%	31%
New hires	35%	16%
Executives	31%	29%
All exempt employees	22%	27%
Other	16%	9%

### Integrated Diversity Educational Programs

For 95 percent of participating members, training is not a stand-alone activity and is embedded into at least one core training program. Furthermore, 75 percent incorporate diversity in multiple venues, signaling that diversity is part of business-as-usual rather than an ancillary activity. The most frequently cited training venue is employee orientation (78 percent). Further, 63 percent of members integrate diversity into new manager training, and another 61 percent continue it with ongoing manager and leadership development training.

Integrated Diversity Programs in Existing Training Venues (n=129)	Percent of Respondents
Employee orientation	78%
New manager training	63%
Ongoing manager training	61%
Leadership development training	61%
Other	6%

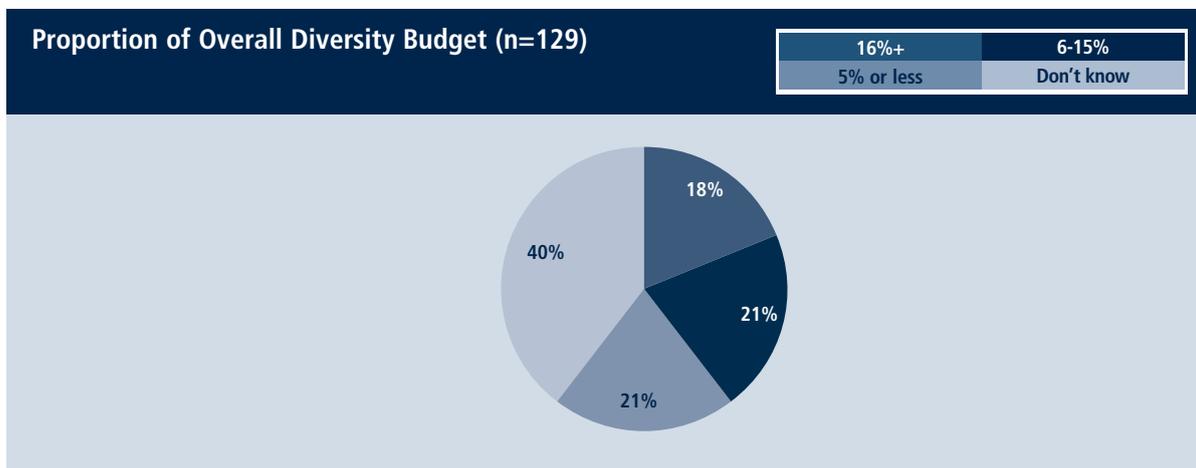
The most frequently cited diversity topic is sexual harassment, with 90 percent of member organizations offering this training as a stand-alone program or as a module in existing programs. General diversity and inclusion and cross-cultural communication are the next two most popular topics provided by member organizations.

Diversity Education Topics (stand-alone or modules) (n=129)	Percent of Respondents
Sexual harassment	90%
General diversity and inclusion	65%
Cross-cultural communication	62%
Workplace flexibility and work/life balance	56%
Gender communications and dynamics	47%

Effective diversity education programs incorporate each organization’s customized definition of diversity and the business case. In particular, training should communicate the dimensions of diversity represented. As the global diversity and inclusion section of this report details, gender is the most common diversity dimension addressed across regions in addition to nationality, race/ethnicity, and other demographic characteristics. Personality and leadership style are also important dimensions of diversity to address. Furthermore, successful training communicates how diversity and inclusion are business issues and details expected behaviors.

### Diversity Education Budget

The allocation of budgetary resources demonstrates commitment to diversity education. Eighteen percent of members report that diversity education comprises 16 percent or more of their overall diversity budget.



## Diversity Education Evaluation

The vast majority of members evaluate their diversity education programs with at least one method, and 84 percent utilize multiple mechanisms. Participating Award winners are more likely to utilize many of the evaluation tools than other participants.

Methods Used to Evaluate Diversity Education Programs (n=129)	Percent of Respondents
Participant feedback	82%
Participation rates	62%
Employee survey results	53%
Diversity representation	50%
External awards and recognition	33%
Qualitative feedback	32%
Retention rates	28%
360-degree feedback	16%

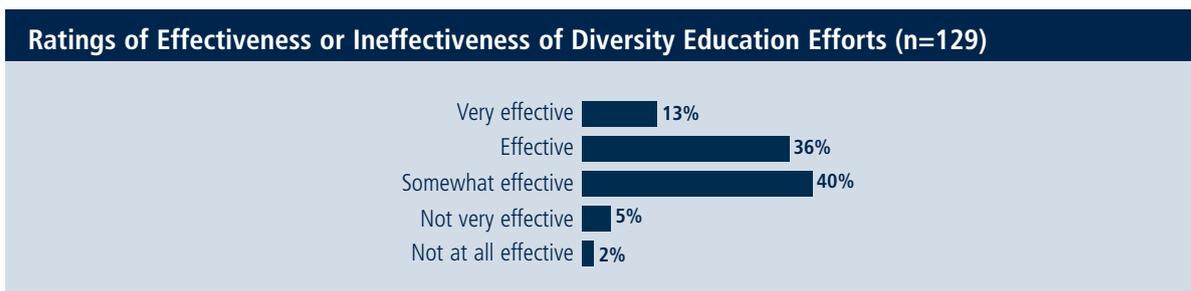
Participant feedback is the most popular evaluation tool used by members. Generally, participant feedback is elicited immediately upon completion of the training; however, optimal information is gleaned after a certain period of time to assess whether any of the lessons were applied on the job.

Few participating members (16 percent) are using 360-degree feedback to assess individual employee’s performance on diversity from the vantage point of managers, peers, and subordinates, which provides a fuller view of behavioral change.

Further, few members are utilizing qualitative feedback (32 percent), such as exit interviews and focus groups, to determine whether inclusive behaviors are being engrained in the culture. Award winners are more likely to use qualitative feedback (48 percent) than other participants (29 percent).

## Diversity Education Effectiveness

We asked member respondents, largely diversity professionals, to assess the effectiveness of their diversity education and training activities. Few members see their diversity education efforts as “very effective” (13 percent), with the majority assessing their efforts as “effective” (36 percent), or “somewhat effective” (40 percent).



It is noteworthy that 29 percent of Award winners rate their diversity education efforts as very effective, compared to 10 percent of other participants. There are two possible interpretations: Members could be responding to the general limitation of diversity education programs to change behavior in isolation, or members could believe they can improve their portfolio of diversity training offerings.

### Catalyst Expert Point of View: Why Is Diversity Education Important?

Paulette R. Gerkovich, Ph.D, Senior Director, Research

A growing body of literature testifies to the employer's advantages of not only having a diverse workforce, but of leveraging it. Those organizations that advance diversity throughout—not only increasing representation of specific groups, but drawing on differences in views, ideas, and decision-making processes—benefit tremendously.

Often one of the first steps employers make in implementing a diversity strategy is offering diversity training. Employees must understand that the organization has solid, business reasons for focusing on the issue of diversity. This focus will guide employees in recognizing how their frames of reference (or their own dimensions of diversity) impact interactions with others, while providing instruction on inclusive behaviors. This is critical for change to occur and be sustained.

An effective training program needs strong, visible senior leadership support. If employees know that leadership is committed, they are much more likely to take the program seriously. This commitment will communicate to participants that they work in an organization where leveraging diverse talent is a business imperative mandated by management.

The effectiveness of the diversity program should be measured, and measurement criteria should be realistic. Finally, a diversity training program must exist within the context of an overall diversity management strategy. It must operate in conjunction with other programs that communicate the importance of diversity, increase inclusiveness, leverage diverse thinking, and measure progress. Quite simply, diversity training is one mechanism that fosters a culture that values diversity.

### Catalyst Action Steps

Catalyst believes that training is necessary, but not sufficient to address deeply engrained cultural and institutional resistance to diversity. Diversity education alone will not change the culture in a stand-alone training—it must be rooted in a comprehensive strategy to foster a diverse and inclusive workforce. The following steps will help you create an effective diversity education program.

- **Make participation mandatory.** Mandating diversity education at all levels communicates that the organization is serious about the issue and sets the expectation that inclusive behavior is not optional.
- **Reach each employee multiple times in a developmental sequence of experiences and skill building.** Start with raising awareness for new employees, and then build up to being a diversity champion for executives. Incorporating diversity into orientation programs signals to new hires that diversity is a value to the organization from day one.
- **Infuse diversity into all existing management training.** This sends the message that managing diversity is an essential skill for all managers and sets the expectation that diversity is a core competency for managers. Managers need to know why managing diversity is important and have concrete actions to effectively manage across differences.
- **Demonstrate senior leadership commitment.** To reinforce messages in diversity training, senior leaders need to frequently communicate that diversity is a business issue. One mechanism is for senior leaders to participate in the delivery of diversity training. Furthermore, senior leaders need to hold managers and employees accountable for behaving inclusively.

- **Address subtle, unconscious behaviors.** Effective diversity education helps employees become more conscious of the impact of their own interactions and to behave more inclusively. Both overt negative behaviors and subtle, “micro-messages” can have a tremendous impact on your workforce and on your entire diversity plan.
- **Evaluate the effectiveness of your education efforts.** First, clarify the goals of your diversity education efforts and ensure that they are realistic and measurable. Then, utilize multiple evaluation techniques that measure changed behavior through participant follow-up, qualitative feedback, and survey results, in addition to attendance at training sessions.

## Catalyst Resources

### Tools

Catalyst Spectrum,<sup>SM</sup> a web-based service assisting organizations in the development of diversity strategies

### Publications

*Making Change: Becoming a Diversity Champion* (2002)

*Making Change: Tackling Resistance to Diversity Efforts* (2002)

*Women of Color in Corporate Management: Opportunities and Barriers* (1999)

## WOMEN OF COLOR/VISIBLE MINORITY WOMEN

This year marks the first time Catalyst asked members about their efforts to advance women of color in their U.S. operations or visible minority women in their Canadian operations. Catalyst has been studying the experiences and attitudes of women of color in corporate management since 1997. The findings from this report confirm our experience searching for organizational practices in this area that there are few employers specifically targeting programs and initiatives to the unique needs of women of color and visible minority women.

### Key Findings

After nearly seven years since Catalyst began studying the unique issues and experiences of women of color in corporate management, few organizations have targeted efforts for this important employee group. Only 33 percent of participating members have any kind of women-of-color-focused programs or initiatives.

### Formal Initiatives and Programs for Women of Color

Only 33 percent of member respondents have programs or initiatives that focus specifically on women of color. Furthermore, 45 percent of members do not even track the participation of women of color in other programs and activities. In contrast, 90 percent of participating members address gender in their organizations, and 85 percent address race/ethnicity issues. Religion is the only diversity dimension of the seven listed that elicits a lower percentage than the data on women of color reported here.

Formal Initiatives or Programs for Women of Color/Visible Minorities (n=127)	Percent of Respondents
<b>Total without Programs (n=86)</b>	<b>68%</b>
No programs or tracking of participants in other programs	45%
No programs, but track participation in other programs	23%
<b>Total with Programs (n=41)</b>	<b>32%</b>
Both women of color as a whole and specific sub-groups	17%
Only women of color as a whole	11%
Only specific sub-groups of women of color	5%

Catalyst Award winners appear to recognize the importance of understanding the unique experiences of women of color. More than one-half (53 percent), of Award-winning respondents have women-of-color-focused programs compared to 28 percent of other participants. Furthermore, more participating members with at least one woman-of-color executive have targeted programs than participating members overall (43 percent and 32 percent, respectively).

### Targeted Efforts for Women of Various Racial/Ethnic Groups

Women of color/visible minority women are not a monolithic group, and it is important to understand the unique issues members of each group face. Catalyst research finds that while there are commonalities between African-American women, Asian women, and Latinas, there are also important differences. Nearly two-thirds of members do not have efforts targeting any specific racial/ethnic groups of women.

Racial/Ethnic Group Targeted (n=129)	Percent of Respondents
African-American/Black women	30%
Latinas/Latin American women	30%
Asian-American/Asian women	26%
Native American/Aboriginal women	25%
None	64%

### Women-of-Color-Targeted Activities

Networks or affinity groups are the most frequently cited activity targeted to women of color, followed by high-potential and leadership development activities, mentoring programs, and conferences. Thirty-eight percent of members offer none of the activities targeted to women of color, while 40 percent offer multiple women-of-color-focused activities.

Women-of-Color-Targeted Activities (n=129)	Percent of Respondents
Employee network or affinity group(s)	36%
High-potential or leadership development programs	26%
Mentoring program(s)	26%
Conference(s)	24%
Special taskforce or diversity council sub-committee	22%
Other	14%
None	38%

### Canadian and U.S. Comparisons

Because of the different historical and legal contexts for people of color in the United States and visible minorities in Canada, it is important to compare the responses separately. While 38 percent of U.S. respondents (39 of 104) have formal programs for women of color, only 6 percent of Canadian members (1 of 17) do for visible minority women.

Sixty-five percent of Canadian members (11 of 17) and 63 percent of U.S. members (65 of 104) do not focus on any racial/ethnic group of women. However, 35 percent of Canadian members (6 of 17) focus on one ethnic group of women, with all but one company targeting Aboriginal women. Most of the U.S. members with targeted programs focus on the four most common minority racial/ethnic classifications of women in the United States.<sup>7</sup>

### Workforce Statistics

The metrics presented in the workforce statistics section of this benchmarking report underscore the need to focus attention on women of color. Women of color represent only 2 percent of management committees of participating members, yet they are 16 percent of new hires. While the proportion of white women and men of color appears to gradually dissipate through the pipeline, there is a marked decline for women of color between the second and first level below executives/partners, from 14 percent to 6 percent. The turnover data suggest that this drop-off is a result of women of color leaving their organizations—17 percent of second-level women of color left in 2003, compared to 12 percent of men of color, 14 percent of white women, and 10 percent of white men. This corroborates Catalyst research findings showing that women of color often have to move out to move up.

<sup>7</sup> For example, the minority racial/ethnic classifications used by the U.S. Equal Employment Opportunity Commission are Black/African-American, Hispanic/Latino, Asian Pacific Islander, and American Indian/Alaskan Native.

### Catalyst Expert Point of View: Why Are Women-of-Color Programs Important?

Katherine Giscombe, Ph.D., Senior Director, Research

The glass ceiling, as most corporate executives know, refers to barriers to upward mobility experienced by women. In contrast, women of color often characterize the barriers they encounter as comprising a “concrete ceiling”—one that is denser and less easily shattered. This observation has been confirmed in all of Catalyst’s research on the topic.

Women of color hold a “double outsider” status, because they are a different race/ethnicity and gender than the group most traditionally powerful in organizations: white men. Women of color often encounter stereotyping, questioning of authority and credibility, and lack of fit in corporations. Senior women of color interviewed by Catalyst observe that when leaders take risks by mentoring women of color and providing them with high-visibility assignments, this greatly improves their opportunities to advance. But women of color also note that this happens all too rarely.

Employers need to make a serious effort to create and maintain work cultures that fully embrace women of color. At least 75 percent of the Fortune 500 companies have some type of formal diversity program;<sup>8</sup> however, women of color judge diversity efforts at their organizations as having limited benefits. Most do not feel that their managers are held accountable for diversity goals; they do not think career advancement is an important part of diversity programs; nor do they believe diversity programs have made corporate cultures inclusive of women of their race/ethnic groups. African-American women, in particular, tend to be quite pessimistic about their opportunities to advance to senior management.

Employers need to assess whether their overarching diversity efforts are sufficient to address the interplay of race and gender for women of color. Differences within and among employee groups can only be valued when recognized.

## Catalyst Action Steps

While corporate diversity initiatives are increasingly becoming comprehensive in their definition of diversity, Catalyst’s research on women of color suggests that “one-size-fits-all” diversity initiatives may not be effectively addressing the differences that exist within the broad categories of gender, race, and ethnicity. Following the steps below will help you address the specific needs of women of color with your diversity strategy.

- **Understand the unique needs and experiences of women of color.** Begin analyzing HR and employee survey data for women of color/visible minority women, benchmarking your organization’s progress with women of color against the progress of men of color, white women, and white men. Then convene focus groups of women of color to understand their unique experiences within the organizations. Tailor programs and policies to challenge managers’ assumptions about different employee sub-groups.
- **Demonstrate your organization’s commitment to women of color/visible minority women.** Catalyst research demonstrates that senior management commitment to diversity increases retention of women of color. Designate influential senior executives to champion the advancement of women of color. Leaders can communicate the business rationale for focusing on this employee group, share success stories, debunk myths, model behavior, communicate vision, and hold managers accountable for results.
- **Recognize the differences among sub-groups of women of color in your organization.** There are many commonalities in the experiences of African-American, Asian, Latina, and Native-American women, but there are also important differences in backgrounds, needs, and perceptions. Ensure that diversity programs are designed to address differences among women of color.

<sup>8</sup> Society for Human Resource Management, *SHRM Survey of Diversity Programs*. (July, 1998).

- **Foster mentoring relationships for women of color.** The top barrier to advancement cited by women of color in Catalyst's research is not having an influential mentor or sponsor. Ensure forums exist where women of color can gain exposure to senior-level people who may be available as mentors. Develop or improve formal mentoring programs so women of color participate in and benefit from them.
- **Support the creation and ongoing activities of women-of-color workplace networks.** Catalyst research finds that women of color lack access to informal networks. Formal networks organize networking events for members, set up mentoring programs and speakers series, and showcase role models. The organization also benefits when the network serves as a voice and a resource to HR and senior management on the issues members face.
- **Ensure representation of women of color on slates for promotions and high-visibility assignments.** Monitor the representation of women on slates for promotions and key developmental assignments. Also, monitor whether women of color continue to appear on slates without ever being selected. Ensure that managers are creating career developmental plans to prepare these women to successfully compete for promotions and stretch assignments and to develop a targeted plan on how to provide the necessary skills and experiences.

## Catalyst Resources

### Publications and Factsheets

*Advancing African-American Women in the Workplace: What Managers Need to Know* (2004)

Quick Takes: African-American Women (2004)

Quick Takes: Asian-American Women (2004)

Quick Takes: Latinas (2004)

*Advancing Asian Women in the Workplace: What Managers Need to Know* (2003)

*Advancing Latinas in the Workplace: What Managers Need to Know* (2003)

*Making Change: Moving Women of Color Up the Ladder* (2002)

*Women of Color in Corporate Management: Three Years Later* (2002)

*Women of Color Executives: Their Voices, Their Journeys* (2001)

*Women of Color in Corporate Management: Opportunities and Barriers* (1999)

## WORKPLACE FLEXIBILITY

Catalyst defines flexibility in its broadest terms: variations in the time and place of work, in both the short- and long-term, on a formal and informal basis. Workplace flexibility is more than a change in schedule—it is a way of thinking and working that seeks to help employees make their best contributions and simultaneously manage their personal lives. The majority of member organizations are engaged in a range of flexibility activities, but they continue to face challenges embedding a more flexible way of thinking and working into the fabric of their cultures.

### Key Findings

The majority of members report having one or more workplace flexibility policies and that their efforts are “generally effective.” However, few members report that their workplace efforts are “highly effective.”

### Types of Workplace Flexibility

Ninety percent of participating members report having formal policies, initiatives, or sets of programs to address workplace flexibility. Just over one-half of members offer a combination of centralized and decentralized workplace flexibility programs with corporate-wide, regional, and business-unit-generated activities.

Eighty-five percent of members offer multiple flexibility options, while one in five participants have all five types of programs. Award-winning participants are more likely to offer each of these programs than other participants.

Activities to Foster Workplace Flexibility (n=129)	Percent of Respondents
<b>Informal Flexibility</b> Informal flexibility includes programs or activities that create a culture where individuals can vary work hours and location to meet both personal and work demands without repercussions.	92%
<b>Formal Part-Time Flexible Work Arrangements</b> Part-time or reduced-time arrangements involve fewer than the standard hours or schedule. These can be combined with telecommuting or flex-time arrangements.	83%
<b>Formal Full-Time Flexible Work Arrangements</b> Full-time flexible options are alternatives to the standard or traditional work schedules. Examples include flex-time and telecommuting.	73%
<b>Career Path Flexibility/Customized Career Paths</b> Career path flexibility allows the ability to plan career moves or postpone a promotion or a relocation during a period of time, and retain the ability to advance or move at the end of that period.	39%
<b>Work Redesign</b> A strategic process that seeks to improve productivity by following a dual agenda: to enhance business performance and to help employees better manage personal responsibilities. In work redesign, businesses and employees partner together to identify and eliminate low-value and inefficient work activities and outmoded business practices.	33%

Many member organizations have an array of flexible work options on the books, but the extent to which employees use these flexible work options can vary widely by organization. The perception of negative career consequences is a major impediment to greater utilization. In Catalyst's 2003 study of women executives in U.S. corporations, only 15 percent of senior women believe that they can use a flexible work arrangement without jeopardizing their career advancement.<sup>9</sup>

A significant minority of members have moved further along in the journey of creating a more flexible work environment, with 39 percent reporting they have career path flexibility and 33 percent reporting work redesign activities. Increased career path flexibility, which creates a wider variety of broadly accepted career models, is vital to bolstering the critical mass of women in leadership roles. Work redesign, or examining how flexibility can support greater work effectiveness, is another emerging and significant trend.

### Reasons to Foster Workplace Flexibility

Participants were asked to rank the top three most compelling reasons to foster workplace flexibility in their organizations. The vast majority of participating members (91 percent) rank employee satisfaction, engagement, and commitment as one of the top benefits of flexibility, as well as the related benefit of improved retention (83 percent).



While approaching flexibility from the perspective of work design is an emerging trend, we are encouraged to see that more than one-half (53 percent) of member respondents link flexibility to productivity. They are much less likely, however, to connect flexibility to innovation and creativity (9 percent), which are also potential benefits of helping employees design their work to have the greatest impact for the organization.

Surprisingly, less than one-half of member respondents highlight recruitment among the most compelling reasons to foster workplace flexibility. Research demonstrates that both women and men are looking for increased flexibility in their employers. For example, in Catalyst's study of dual-earner couples, 87 percent of women and 82 percent of men reported they would seek out flexible hours in a new employer.<sup>10</sup>

### Workplace Flexibility Evaluation

Eighty-three percent of participating members evaluate their workplace flexibility efforts with at least one mechanism, and 72 percent utilize multiple evaluation techniques.

<sup>9</sup> Catalyst, *Women in U.S. Corporate Leadership: 2003* (2003).

<sup>10</sup> Catalyst, *Two Careers, One Marriage: Making It Work in the Workplace* (1998).

The most frequently cited evaluation mechanism is employee surveys (61 percent). Employee surveys can be an effective tool for assessing employee satisfaction, engagement, and commitment, which is the primary reason cited by participants for fostering workplace flexibility. Forty percent of respondents evaluate retention rates, utilization rates, and/or qualitative feedback to assess their flexibility efforts. Fewer members measure their success through external awards, 360-degree feedback, productivity rates, or promotion rates of flexibility users.

Methods to Evaluate the Success of Workplace Flexibility Efforts (n=129)	
Employee survey results	61%
Retention rates	41%
Utilization rates	40%
Qualitative feedback, i.e. focus groups and interviews	40%
External awards and recognition	31%
360-degree feedback	15%
Increased productivity rates	13%
Promotion rates of flex users	8%
Other	2%

Catalyst Award winners are considerably more likely than other participants to evaluate the effectiveness of their flexibility efforts, particularly through seeking employee feedback with surveys (81 percent), focus groups and interviews (62 percent), and in tracking utilization results (57 percent).

### Workplace Flexibility Effectiveness

Members were asked to report their perceptions of their organizations' workplace flexibility efforts. Only 9 percent of participating members rate their flexibility efforts as "very effective," and an additional 35 percent describe their efforts as "effective." Nearly one-half (46 percent) describe their efforts as only "somewhat effective."



Catalyst Award winners are substantially more likely to rate themselves as effective—52 percent compared to 31 percent of other participants. By definition, Catalyst Award winners represent organizations having outstanding initiatives that promote women's career development and advancement. Catalyst has found that creating work environments that support flexibility is one of several key ingredients in creating and maintaining a pipeline of talented women.

### Workplace Flexibility Challenges

Catalyst probed the difficulties organizations encounter in addressing workplace flexibility. The work culture—the beliefs, customs, and norms that define the environment—is identified as the greatest impediment to workplace flexibility. Nearly two-thirds (63 percent) of members identified the face-time culture, and more than one-half (54 percent) highlighted overwork and the long-hours culture as their greatest challenges in addressing workplace flexibility.

**Top Three Most Difficult Challenges Your Organization Faces in Addressing Workplace Flexibility (n=129)**



Forty-one percent of respondents point to the lack of commitment from managers as an obstacle. Employers can move a long way toward creating more supportive and flexible work cultures by helping managers to develop greater competency in this area. On a positive note, only 18 percent of member respondents identify lack of senior management commitment as a key obstacle. This is similar to the diversity engagement findings in this study, where 42 percent of members report that their senior executives are very engaged in diversity efforts, compared to 9 percent who report the same for middle managers.

**Catalyst Expert Point of View: Why Is Workplace Flexibility Important?**

**Lisa Levey, Director, Advisory Services**

Much has changed about how, where, and when we do our work on a day-to-day basis. Seismic forces—globalization and technology being two among them—have driven changes in our work patterns. Through Catalyst’s consulting work, we have heard in numerous interviews and focus groups how employees work differently than before. Working flexibly—whether that means to pick up an elderly parent at a doctor’s appointment during midday or to stay late to speak with a colleague based in a different time zone—has become the “new norm.”

The question then becomes: How can flexibility be used in your organization to support greater work/life quality and effectiveness? At its core, flexibility is a tool that enables employees to be their best, because they work in ways that are personally optimal and that are aligned with their most deeply held values.

In Catalyst’s work with client organizations, we focus managers and employees on the critical question: “What are the obstacles that prevent you and your team from being most effective at work?” Life issues—such as needing to leave by 5:00 p.m. for pickup at day care—are certainly part of the mix, but at least as pressing is the long list of pure work issues that impact effectiveness, including not having the necessary technological resources, sitting through endless meetings that seem to lack clear objectives and outcomes, constant interruptions that don’t allow for strategic thinking, and the necessity of answering emails at the end of a long day while feeling burned out and in need of a fresh perspective.

Flexibility is simultaneously a mindset and a strategy for doing business. It is about good management and helping employees be successful in both their work and personal lives. At Catalyst, we know from working with professional women for decades that flexibility is core to their ability to manage their myriad priorities and feel effective in their personal lives. Our research shows that men are just as interested in flexibility as women are, and that dual-focused executives of both genders advance and thrive. We have also learned that flexibility is a powerful tool for meeting organizational goals by helping employees to be most effective in their work, no matter where or when that might happen.

## Catalyst Action Steps

While the use of daily flexibility has increased in many member organizations, respondents also report that face-time and overwork cultures still persist in their organizations. Many Catalyst members have moved past the initial stages of putting policies in place. The next phase involves embedding flexibility into the culture. Here are some recommendations:

- **Develop strong and consistent messaging.** Let employees know that the organization supports their use of flexibility as a means to work more effectively as well as better manage their personal lives.
- **Evaluate work practices.** Identify the essential work and work products, explicitly communicate quality standards and expected timelines, provide a forum for discussing concerns as they arise, encourage employees and teams to come up with new work solutions, and challenge the line-of-sight management practices that persist in many organizations.
- **Challenge unspoken norms about how work gets done and who gets ahead.** As a result, avenues are created for employees to discuss how work can be managed more efficiently, how customer and client needs can be better met, and how quality can be enhanced.
- **Adapt human resources and reward systems that equate hours with contribution.** For example, headcount systems that penalize managers for having employees that work less than full time and billable-hour systems that equate time billed with employee value and productivity.
- **Provide adequate organizational supports for managers and employees.** Tools, such as written materials and web sites communicating flexibility options and a proposal process for requesting a flexible arrangement and information and training sessions, can help employees at all levels build awareness and skills for working and managing more flexibly.

## Catalyst Resources

### Tools

Workplace Flexibility Workshop: Customized sessions to address a range of goals, including executive sessions to forge the relationship between flexibility and business needs and increase cross-department coordination; development of a global flexibility strategy; work redesign; preparing managers to lead flex activities; preparing human resources professionals to serve as internal flex experts.

### Publications and Factsheets

Quick Takes: Older Workers (2004)

Quick Takes: Working Mothers (2004)

Quick Takes: Work-Life (2004)

*Bit by Bit: Catalyst's Guide to Advancing Women in High Tech Companies*, includes booklet "Make Work/Life Effectiveness Work" (2003)

Viewpoints: Workplace Flexibility Isn't Just a Women's Issue (2003)

Viewpoints: Workplace Flexibility Is Still a Women's Advancement Issue (2003)

*Making Change: Building a Flexible Workplace* (2002)

Workplace Flexibility Infobrief (2001)

*Flexible Work Arrangements III: A Ten-Year Retrospective* (2000)

*Two Careers, One Marriage: Making it Work in the Workplace* (1998)

*A New Approach to Flexibility: Managing the Work/Time Equation* (1997)

*Making Work Flexible: Policy to Practice* (1996)

## BUSINESS TRAVEL AND RELOCATION POLICIES

Due to globalization and the decentralized nature of many organizations, employees increasingly interact with colleagues, customers, and clients all over the world. As businesses globalize, so must their executive teams. Global experience is becoming a more important requirement for those who aspire to senior leadership positions.

After the recent economic downturn and the tragic events of September 11, 2001, many organizations reexamined their travel and relocation policies. While the motivation to reduce travel was largely due to cost-cutting, the ability to better manage work with personal responsibilities may be an unexpected benefit. In addition, many companies struggle with how to develop global managers and particularly with how to manage the relocation process.

### Key Findings

Many Catalyst members have witnessed a decrease in travel among their managers and executives in recent years and are experimenting with alternatives to travel and relocation. Few organizations provide tools and resources for communicating across borders and adequately support expatriates and their families on international assignments. There are no meaningful differences in this section between Catalyst Award winners and other participants.

### Business Travel Reduction Efforts

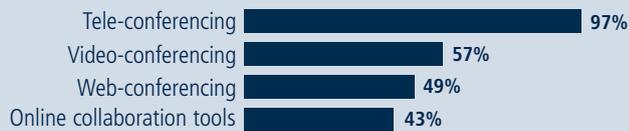
Few participating members report an increase in business travel in the past three years (15 percent), with more than one-half decreasing travel demands (58 percent).



Fifty-two percent of participating members (65 organizations) have formal policies or guidelines in place designed to reduce business travel. Of these 65 organizations, 80 percent have reduced or redesigned meeting activities to decrease travel, 62 percent have guidelines to determine the necessity of travel, and 57 percent have set monetary limits on travel. It is encouraging that some organizations are examining how they conduct meetings in-person or across time and geographic boundaries.

In spite of this, participating members are not utilizing the wide array of technology that is available. Nearly all organizations are using tele-conferencing frequently or very often as a substitution for business travel (97 percent), which is the easiest and least expensive of the options mentioned. The newer, more expensive options are less common, with 57 percent of members utilizing video-conferencing, 49 percent using web-conferencing, and 43 percent using online collaboration tools on a regular basis. In addition, employees may not be aware of or have the necessary training on how to leverage technological tools.

**Usage of Telecommunication Tools to Reduce Business Travel (Very Often or Frequently) (n=65)**



**Relocation Self-Selection and Alternatives to Relocation**

Catalyst research finds that global managers want control over when to relocate, taking into account how moves fit into their own careers and how they impact their personal lives. Fifty-six percent of members allow employees to self-select as candidates for international relocation, and 72 percent do so for domestic relocation. Many members appear to understand that there are alternatives to relocation for gaining international experience. Of the 108 members with global operations, more than three-quarters offer short-term relocations (78 percent) and global team assignments (76 percent).

**Alternatives to Relocation for Gaining International Experience (n=108) Percent of Global Respondents**

Short-term relocations or rotations	78%
Participation on global teams or taskforces	76%
Position with worldwide or regional responsibilities not involving relocation	62%
International/cross-cultural training or education	40%

The traditional three- to five-year expatriate assignment will always be a challenge for a proportion of any organization’s managerial population. Mandating that experience in order to advance systematically excludes certain groups, particularly dual-career couples. As a result, organizations are testing alternatives to relocation to develop global experience and worldview. In some organizations, these options are seen as complements and bundled together to provide a fuller global experience, e.g., a short-term relocation coupled with participation on a global taskforce. However, these assignments must be valued as legitimate alternatives to be effective.

**International Relocation Supports**

More than two-thirds of global members<sup>11</sup> offer the basic level of relocation support, including school referrals, destination services, and cultural and language training for employees and families. However, few members ease the transition for spouses and partners with careers, such as offering job contacts and placement services, career counseling, or networks. Also, few offer mentors or networks to expatriates to ensure they stay connected and are getting the advice and guidance they need to succeed in these challenging positions.

**Services and Programs Offered to Help Expatriates Adapt and Succeed in Overseas Assignments in Members with Operations or Offices Outside of Headquarters Country (n=108)**

<b>Basic Supports</b>	
School and childcare referrals	77%
Destination/settling-in services	73%
Language training for employee	70%
Cultural training for employee	69%
<b>Work/Life and Family Supports</b>	
Cultural training for family/partner	62%
Language training for family/partner	60%

continued on next page

<sup>11</sup> Companies with offices or operations outside their headquarters country.

<b>Services and Programs Offered to Help Expatriates Adapt and Succeed in Overseas Assignments in Members with Operations or Offices Outside of Headquarters Country (n=108) (continued)</b>	
Employee counseling for stress and adjustment	55%
Family counseling for stress and adjustment	51%
Flexible compensation and benefits package	36%
Eldercare referrals	31%
<b>Dual-Career Spouse/Partner Services</b>	
Job contacts or placement services for spouse/partner	30%
Spousal allowance for job search, education, etc.	29%
Career counseling for spouse/partner	27%
Formal network in host country for family/partner	11%
<b>Expatriate Career Supports</b>	
Repatriation program	56%
Formal home-country mentor	18%
Formal network in host country for employee	17%
Formal host-country mentor	17%

In Catalyst’s 2000 study of global managers,<sup>12</sup> women in international assignments often found themselves more isolated than their male counterparts, without the naturally occurring networks and mentors available to men. Seventy-two percent of the expatriate women wanted a formal home-country mentor, 81 percent wanted a formal host-country mentor, and 79 percent wanted a formal employee network. Yet, according to this benchmarking report, very few women were getting these supports at the time of the study.

Fifty-six percent of participating members provide repatriation supports. The vast majority of global managers in Catalyst’s research report that their international experiences make them more marketable, but fewer believe that their global assignments will enhance their advancement with their existing employers. Employees are often convinced to accept overseas assignments because of the career benefits, but when they return they often believe their experiences are not truly valued by their organizations. Former expatriates are significantly less optimistic than those currently abroad; only 45 percent believe their experiences abroad will help them advance in their current organizations.

**Catalyst Expert Point of View: Why Are Travel and Relocation Policies Important?**

**Denise Weber, Analyst, Advisory Services**

In many companies, frequent travel and relocations are an important part of how business is conducted. These experiences can be a way to develop talent in key markets, build business in emerging markets, and prepare high-potential managers for positions with global or regional responsibilities. However, traditional global mobility can also represent a major cost in time and money.

Many organizations have not dealt with travel and relocation policies in a strategic way. At Catalyst, we have seen both travel and relocation decrease in many organizations, and some are experimenting with new ways to effectively communicate with colleagues and clients all over the world. However, past precedent and one-off decisions often prevail.

Most current conventions around travel and relocation were developed when the world was a different place. Managers were likely to have a spouse who didn’t work outside the home who could relocate with them or take care of personal and family responsibilities if they were frequently traveling. They were

<sup>12</sup> Catalyst, *Passport to Opportunity: U.S. Women in Global Business* (2000).

also likely to come from the headquarters region, and the only route to global experience was immersion in a “foreign” culture through long-term relocation.

Now, through partnerships between global and local managers, communication tools such as the Internet and video-conferencing, increased phone and computer access, and transportation improvements, high-potential managers can develop successful businesses and individual competencies in a variety of ways blended from traditional and alternative global experiences.

Timing is essential for international relocations, and women in particular do not want to be permanently penalized for rejecting an offer. In Catalyst’s 2000 study of global managers, 84 percent of expatriate men and women felt the time was right for their assignments, but recognize that their circumstances change.<sup>13</sup> A woman or man who is not mobile when first approached could well be in a different situation later.

In this global world, forward-thinking organizations can gain a competitive advantage if they can expand the pool of global talent and leverage the global experience of their managers around the world.

## Catalyst Action Steps

Catalyst members are grappling with effectively communicating across borders and developing their global leadership cadres. Despite the significant cost of global business travel and relocation, these findings point to many ways organizations can more strategically address these issues.

- **Examine travel policies and supports.** Use technology and other means strategically to minimize the human and financial cost of constant international travel, and provide guidance on how to effectively use telecommunications tools for geographically dispersed teams.
- **Understand the importance of timing.** Annual employee goal discussions are a logical time to address the possibilities of international relocation. While at one particular time, an employee’s personal or professional situation may make relocation difficult, circumstances can change. HR systems should be dynamic and be able to track an employee’s willingness to travel and relocate within a given period of time.
- **Provide career supports for expatriates.** Expatriates want and need support and guidance during their assignment. Discuss career development with expatriates before, during, and after assignments. Formal home-country and host-country mentors can be important mechanisms for expatriates to stay connected and be successful during their assignment. In addition, global women’s networks foster connections among women around the world.
- **Improve relocation support for partners and families.** Flexible benefits recognize different family needs. Dual-career couples need real employment assistance with placement services and career counseling.
- **Value alternatives to relocation.** Recognize that overseas assignments are not the only way to gain global experience and legitimize alternatives such as global teams, short-term assignments, and frequent flyer positions. Furthermore, don’t penalize people for declining international relocation because of work/life conflict.

## Catalyst Resources

### Publications and Factsheets

Viewpoints: Workplace Flexibility Isn’t Just a Women’s Issue (2003)

Viewpoints: Workplace Flexibility Is Still a Women’s Advancement Issue (2003)

*Making Change: Tapping Women for Global Assignments* (2002)

*Passport to Opportunity: U.S. Women in Global Business* (2000)

<sup>13</sup> Catalyst, *Passport to Opportunity: U.S. Women in Global Business* (2000).

## CONCLUSION

There is much good news in this year's benchmarking report. Catalyst members are engaged in a wide array of activities promoting diverse and inclusive workforces. Catalyst Award winners continue to lead the way on many fronts.

There is more work to be done as evidenced by the workforce statistics where women and people of color remain underrepresented at senior-most levels. Members admit that their various activities, including diversity education and workplace flexibility, are not as effective as they could be. Also, their employees are not fully engaged in diversity at all levels.

It is tempting to jump right in and begin implementing a range of actions in your organization. However, your efforts will not be effective if you do not tailor your strategy to fit the unique needs of your workplace. Utilize interviews, focus groups, and survey data to provide insight into employees' perceptions of the organization's policies and programs and prioritize your next steps.

In addition, simply having a program or policy isn't enough. Each program cannot operate in isolation; it must be integrated into a comprehensive campaign in order to make sustainable change. The overall strategy, as well as each individual component, requires senior leadership commitment, effective communication, a strong business case, and accountability mechanisms to be successful.

Whether you have just begun the diversity journey or you have already been recognized as a leader in the field, this report serves as a marker of where you are and where you still need to go. It is our hope that this fact base serves as a platform to make change in your organization.

## ACKNOWLEDGMENTS

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Meredith Moore directed the research and authored the report. Jane Newkirk directed the membership participation effort. Emily Wakeling coordinated the team of Catalyst relationship managers who worked to solicit member participation. Meesha Rosa managed the database, data analysis, and company report production. Kenitra Boone performed data entry.

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120 Wall Street, 5th Floor  
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SAN JOSE

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San Jose, CA 95134  
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fax/ 408-577-0425

TORONTO

8 King Street East, Suite 505  
Toronto, Ontario M5C 1B5  
tel/ 416-815-7600  
fax/ 416-815-7601

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