
Tool 6-1

Preparation Checklist for the Conversy Development System

PART I: INDIVIDUAL DEVELOPMENT AND SELF-AWARENESS

- ☐ Read chapters 1–5 of this workbook.
- ☐ Complete a self-awareness assessment (Assessment 13–1).
- ☐ Participate in a diversity training program.
- ☐ Attend diversity conferences, as available.
- ☐ Formulate a personal development action plan.

PART II: LEADERSHIP INVOLVEMENT

- ☐ If possible, invite others to collaborate on your internal needs assessment.
- ☐ Collect *preliminary* data on your organization. More thorough research may be conducted in the needs analysis phase, after resources are allotted for this end with the support of your organization's leadership. Possible areas of investigation include the following:
 - ◆ levels of litigation, EEOC claims, and/or harassment complaints
 - ◆ turnover data (Do turnover levels vary according to employee membership in a certain group?)
 - ◆ existing employee satisfaction survey results (Are there any trends or group-specific concerns?)
 - ◆ relationship between ethnic/cultural/gender diversity of the community you serve and that of your employees and leadership
 - ◆ customer analysis (Does your organization reach all groups within your target geographic area?)
 - ◆ customer satisfaction survey results (Are there any trends or group-specific concerns?)
 - ◆ global marketing (Do you sell your products or services abroad? If not, could you?)
 - ◆ reward systems (How are people promoted? How do they receive raises? How competitive is the general environment?)
 - ◆ quality and productivity data.
- ☐ Read chapter 7 in preparation for a presentation to your organization's leadership.
- ☐ Customize the leadership presentation according to internal data collected, time available, and audience in attendance.
- ☐ Run the leadership presentation.

Continued on next page

Tool 6-1, continued

Preparation Checklist for the Conversy Development System

- ☐ Select a task force to serve as an advisory board and working committee throughout the diversity development process. Be certain to involve leaders as appropriate. Diversity development works best with the involvement of as many organizational members as feasible.
- ☐ Run a leadership focus group to help
 - ◆ generate ideas for the initiative
 - ◆ discuss systemic changes to support the initiative (consider areas such as leadership development, recruitment, compensation, reward systems, and the like)
 - ◆ review mission, vision, and goals, connecting these to diversity development needs
 - ◆ decide on the breadth of the needs assessment according to resources available.

PART III: NEEDS ASSESSMENT

- ☐ Consider the topics suggested in your preliminary research: Which ones warrant further study?
- ☐ Decide on at least two methods of information gathering (that is, surveys, interviews, focus groups, analysis of company documents, and so forth).
- ☐ Identify the main stakeholder groups at your organization.
- ☐ Research main culture-specific practices of these groups.
- ☐ Have legal counsel review all needs analysis plans and materials.
- ☐ Divide the needs assessment work load appropriately and run the needs assessment.
- ☐ Analyze results.

PART IV: PROGRAM DEVELOPMENT AND EVALUATION DESIGN

- ☐ Decide whether all issues revealed through your needs analysis are addressed by the modules included in this book. (All of the competencies covered in Modules 1 through 4 are listed in chapter 4.)
- ☐ Read chapters 8 through 11.
- ☐ Decide how you are going to track your progress.
- ☐ Develop or procure evaluation systems and materials.
- ☐ Customize presentations and program materials according to your specific needs. Develop or procure additional materials if appropriate.

Continued on next page

Preparation Checklist for the Conversy Development System

Design Tip: Make sure that your programs and the goals to be measured through your evaluation *match*. If, for instance, your objective is to develop conflict resolution skills, the assessment, presentation, and practice of such skills need be part of the program. If you would like to reduce customer complaints, customer service discussions must be added to the diversity-specific processes suggested in this book. (If needed, procure additional materials such as the ones provided by other titles in the ASTD Trainer's WorkShop Series.)

- ☐ Design incentive systems that connect completion of program activities and action plans to organizational rewards.
- ☐ Decide on appropriate reinforcement and follow-up processes.
- ☐ Have legal counsel review all instructional materials and training and incentive plans.

PART V: PREPARING YOUR PILOT PROGRAM

- ☐ Print participant materials.
- ☐ Invite a small group of workers to pilot-test your first workshop.
- ☐ Lead a focus-group discussion with members of the pilot group to suggest improvements to the training.
- ☐ Revise the workshop according to the recommendations of the focus group. Ask your legal counsel to approve any significant changes made.

PART VI: PREPARING THE FACILITATING TEAM

- ☐ Determine your selection criteria for facilitators.
- ☐ Design your train-the-trainer process.
- ☐ Train your facilitators.
- ☐ Plan the pilot process so as to enable each facilitator to first observe the workshops they are expected to run. For instance, you may have two facilitators observe you as you run the first program. Other facilitators may later observe those first two people trained.
- ☐ Have new trainers co-facilitate a session with you.
- ☐ Plan and implement a continuous improvement/feedback process for facilitators.
- ☐ Follow this sequence for each training module you choose to include.

PART VII: MARKETING

- ☐ Involve the organization's marketing division to help design promotional and campaign materials in support of your diversity development programs.
-

*Tool 12-1****Value Congruency Sample***

	A	B	C
VALUE	HOW YOU RANK THIS VALUE	HOW THE ORGANIZATION RANKS THIS VALUE	VALUE CONGRUENCY
Balance between work and family	3	3	0
Recognition	2	3	1
Innovation	4	0	4
Profits/compensation	4	5	1
Continuous learning	5	1	4
Community involvement	0	1	1
Stability	0	0	0
Integrity	2	4	2
Diversity	0	0	0
Equality	0	3	3
Total			16

Tool 13-1

Interviewer Questions

Instructions: You will meet three candidates today. Here are the questions you will pose to each of them.

1. What important successes have you had in your career?
2. We encourage positive competition in our teams. Will you be comfortable in such an environment?
3. In a recent meeting, our CEO declared that between work and family life, work should take priority. The CEO believes that without work, you can't possibly support your family. How would you respond to this statement?

Tool 13–2

Cultural Rules Card Set

Facilitator instructions: Cut cards apart and give one card to each candidate.

Candidate 1's Cultural Rules

Your general behavior: Lively, animated, talkative

Do: Chit-chat before you establish rapport, talk about your family. Explain that you met your spouse when he or she reported to you at your previous job.

Do not: Compete. If you are asked questions about competition, make sure that the interviewer understands that you never compete with team members.

Candidate 2's Cultural Rules

Your general behavior: Calm, reserved, quiet

Do: Leave respectful pauses before responding to any questions (as long as 10 to 15 seconds).

Do not: Boast about personal success. Rather, somewhat downplay your achievements. The interviewer will understand you are being appropriately modest.

Candidate 3's Cultural Rules

Your general behavior: Assertive and enthusiastic

Do: Talk about your accomplishments; compete with others fairly.

Do not: Mix family and work life; hire or give preference to relatives at work; ask the boss to make all decisions. Make sure you let the interviewer know how you feel about those issues.

Tool 13-3

Values Card Set

Facilitator instructions: Make one copy of this card set for each group. Cut cards apart and distribute a complete set of cards to each group.

Value Card 1

Your key value: Balance between work and family life

You believe that there is time for work and time for family, and the two should not interfere with one another. You have three kids and feel you don't spend enough time with them. They are your first and foremost priority.

Value Card 2

Your key value: Personal space

You are introverted and need to unwind on weekends by spending some time alone. You are against disturbing people on weekends and feel that all work should be done during the week. You also have strong opinions about calling people at their homes, believing that a person's home should be sacred.

Value Card 3

Your key value: Productivity

You feel a lot of loyalty to your organization and believe that there is little the organization could ask of you that you wouldn't do. You believe hard work is essential in life and nothing can be achieved without considerable effort and sacrifice.

Continued on next page

Value Card 4

Your key value: Flexibility

You feel there is always a solution to any problem if only people will be flexible. You are always willing to change your hours to accommodate work needs, as long as the organization is flexible with you when needed.

Value Card 5

Your key values: Spirituality and community involvement

Weekends are important for you. You spend them with your family, volunteer at your place of worship, and help in your community. You believe two days out of seven is already a small contribution and will resist any suggestions to work on those days.

Value Card 6

Your key value: Recognition

You don't mind working until the wee hours if needed, but you want to make absolutely sure your contributions are valued, recognized, and rewarded.

Tool 13-4

Vehicle Card Set

Facilitator instructions: Cut out each vehicle card and distribute two cards to each group.

1



2



3



4



5



6



Continued on next page

7



8



9



10



Tool 13-5

Vehicle Cards Composite Sheet

Facilitator instructions: Print one composite sheet for each group. Distribute the composite sheets during the debriefing.



Tool 13–6

Group Banners

Facilitator instructions: Make one copy of this tool and get one #10 envelope for each group. Cut the banners into sets and place one set in each envelope. Give one envelope to each group and have all participants select one banner from the envelope.

ASIAN AMERICANS

CAUCASIAN AMERICANS

ELDERLY PEOPLE

EXTREMELY OVERWEIGHT PEOPLE

FOREIGN IMMIGRANTS

HISPANIC AMERICANS

INSURANCE SALESPeOPLE

JEWS

MUSLIMS

NATIVE AMERICANS

OLDER WORKERS

SINGLE PARENTS

USED-CAR SALESPeOPLE

Candidate Information Cards

Facilitator instructions: Make one copy of all the cards for each small group. Cut the cards apart, keeping them in sets. If requested, give appropriate cards to group representatives.

1. People with Disabilities

Name: Sam Walker

Age: 35

Brief Description: Paraplegic as a result of a car accident in his youth. Lives on his own, no family. He is currently looking for another job.

Strengths: High energy, enthusiastic; long list of previous jobs; highly experienced in his field of expertise

Weaknesses: Perceived as withdrawn; needs long time to process and reflect on information

2. Gay, Lesbian, Bisexual, and Transgender People

Name: Becky Morgan

Age: 65

Brief Description: Is openly gay and has a life-partner of 36 years. Is close to her 16 nieces and nephews. Has worked for the company for 30 years.

Strengths: Strong leader; clear vision; gets the job done

Weaknesses: Needs to better delegate to meet timeline demands

3. Hispanics

Name: Robert Santana

Age: 42

Brief Description: Married with family; has two children; lives 1.5 hours away from work location.

Strengths: Excellent team-building leadership skills; has worked with people from numerous cultures and backgrounds

Weaknesses: Low tolerance for others who are not open-minded; needs to increase acceptance of others; has tremendous stage fright

Continued on next page

4. Blacks

Name: Kay Creek

Age: 36

Brief Description: Single mother of two schoolage children; one child has Down's Syndrome.

Strengths: Has excellent employee relations skills; is an advocate for employees; knows how to promote problem-solving skills with leaders

Weaknesses: High expectations of others to lead with excellence; expects more from people who do not have the skills

5. Muslims

Name: Ashid Allayah

Age: 27

Brief Description: Pillar of his community; willing to lend a helping hand to others; considered extremely handsome; was promoted three times within the last five years.

Strengths: Always willing to help others in the workplace

Weaknesses: Time management to complete his responsibilities; not openly supportive of changes in the workplace

6. Single Parents

Name: Bob Taylor

Age: 42

Brief Description: Widowed father of two young children who has worked for P²C² for the last five years.

Strengths: Highly energetic; able to make friends easily; able to connect with people different from himself; is likely to make a good impression

Weaknesses: Not good with details; gets flustered with financial explanations; may be perceived as overselling your division

Candidate Information Cards

7. Accountants

Name: Alison Miller

Age: 48

Brief Description: Has worked for P²C² for 10 years. She is loyal to the organization and jokingly says she is “married” to her job.

Strengths: Highly analytical; able to observe details that are often missed by others

Weaknesses: Was married to one of the key people at headquarters and still holds a grudge; rather narrow-minded and uncomfortable with lively negotiations

8. Salespeople

Name: Edward da Costa

Age: 26

Brief Description: A quiet young man with a strong interest in history and archaeology. He is known for his loyalty to the company and for his keen intelligence. His sales success is mostly attributable to his ability to develop long-term relationships with customers.

Strengths: Loyal; perceptive; excellent team player; able to foster a sense of harmony within the group

Weaknesses: Somewhat shy; strongly dislikes conflict; prefers one-to-one contact over large group discussions

9. New graduates

Name: Maria Alvarez-Edwards

Age: 24

Brief Description: Recently hired by P²C² after interning with the company throughout her junior and senior years in P²C²'s summer internship programs.

Strengths: Relates well with all ages; has proven her ability to work well as a team member; has leadership skills

Weaknesses: Hasn't participated in many high-level discussions; needs to acquire more business savvy

10. People of Retirement Age

Name: Arthur Shorenstein

Age: 67

Brief Description: Arthur is a happy-go-lucky person who typically gets his way through influencing others. He has worked for P²C² for the last two years and has been promoted twice within that period of time.

Strengths: Friendly; engaging; charismatic; gives the impression of genuine care for others

Weaknesses: Needs to learn to be more succinct and less talkative; oversells
