




**BUILDING**  
**A DIVERSE**  
**WORK**  
**FORCE**  
**FOR THE**   
**GLOBAL**  
**MILLENNIUM**

**2. Double Standards in  
Performance Appraisals:  
Balancing Work, Family  
and Global Travel**

**FACILITATOR'S GUIDE**



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# INTRODUCTION

Welcome to the Building a Diverse Workforce for the Global Millennium video series. This set of twenty videos is designed to portray scenes that are occurring in the global workplace on a daily basis – scenes about such topics as leadership, teams, organizational change, human resources and diversity. Performed by more than thirty-five professional actors, the vignettes offer a bird's eye view into the challenges and issues that leaders, managers, employees, mentors and team members address on a regular basis.

The video series is, by far, the most significant effort to date to assist organizations in building high-performance teams of diverse global employees. The series has seven videos that relate to global cross-cultural issues, four that focus on the plant or manufacturing floor and the remainder relate to manager and employee issues. The videos address such issues as shifts in culture, style and value clashes; race, ethnic, and gender communications; conflict resolution; balance of work/family/personal; sexual harassment; mentoring/coaching; performance; and recruitment/retention issues.

## VIDEO DEVELOPMENT

In developing this series, Advanced Research Management Consultants (ARMC), a Philadelphia-based management consulting firm, created scenarios using the actual words and situations we heard from leaders, clients and workshop participants. Our goal was to infuse each scene with the tensions, feelings and emotions that one frequently experiences in organizational interactions. As a result, all of these videos depict situations that are complex, just as are the real life situations and relationships we experience.

Additionally, to heighten the sense of realism, ARMC researched the cultural and ethnic archetypes and mores depicted. Therefore, as the viewer observes the exchanges, he or she will also gather information on some of the norms and expectations of the Asian, Latino, European and United States cultures. In this regard, ARMC would be remiss if it did not point out that the data provided through academic and ethnological research represent broad patterns of behavior about groups, but does not and cannot represent the ways in which a particular individual from a given culture might react in a specific situation. As a result, it will always be incumbent upon each of us to get to know and understand as individuals the people with whom we interact.

## BRINGING DIVERSE PEOPLE TOGETHER

With respect to workplace interactions, sometimes the gentle simplicities and intricate turns of our lives can collide with those of our colleagues. This is especially true with interactions involving widely diverse individuals who are being asked to integrate their cultures, styles, skills and talents in an arena where excellence and high yield productivity are demanded. Such organizational rigors, pressures and expectations can produce uncomfortable exchanges. The viewer has ample opportunity to witness not only what is obvious, but also to explore the nuances of the vignettes.

As viewers wrestle with the issues, they will determine the extent to which the characters are impacted by varied factors. Such factors include: language, culture, age, personal style, religion, race, ethnicity, national origin, gender, politics, family structure, organizational leadership, coaching and mentoring skills, communication and listening skills, conflict resolution skills and human resources policies and practices. Through introspection, dialogue and discussion, viewers will be positioned to develop better solutions to make their organizations the best among their peers or competitors.

## VIDEO PACKET CONTENTS

Your video packet contains the following materials:

- Character Profiles
- Closing Statements
- Video Highlights and Discussions Points
- Key Learnings
- Video Debrief Exercises
- Handouts for Debrief Exercises
- Reference I ( Diversity Management Defined)
- Reference II (Comparing Managing Diversity and Affirmative Action/Equal Employment Opportunity)
- Reference III ( Implementing Diversity Management Constituent Capitalization)
- A List of All ARMC Products and Services

## ARMC ACKNOWLEDGEMENTS

It is important to recognize that this video series would not have been produced if it were not for the foresight, leadership and generous financial support of Carrier Corporation and The Thomson Corporation. We at ARMC will be always indebted for their considerable support.

## CHARACTER PROFILE

### ELIZABETH LEARY

- 46-year-old White woman
- Director
- Has been with the organization for 15 years
- Has been rated fully competent for the past 2 years
- Received a B.S. and M.S. from Purdue University
- Is married with two teenagers
- Has been John's supervisor for 10 months

### JOHN MEREDITH

- 34-year-old White man
- Manager
- Has been with the organization for 5 years
- Received exceptional performance evaluations for 2 years
- Received a B.S. and M.S. from UCLA
- Is married with two children in grade school
- His father lives with him

## CLOSING STATEMENTS

### 2. DOUBLE STANDARDS IN PERFORMANCE APPRAISALS: BALANCING WORK, FAMILY AND GLOBAL TRAVEL.

#### ELIZABETH

My job is to build an effective, efficient organization. I cannot have a team that believes they should have preferential treatment. That will not build trust and respect.

#### JOHN

What's going on here? I'm following the company's philosophy to balance work, family and personal life, but I feel like I am being treated unfairly because of it. I mean, I met my objectives, I am an outstanding performer. Honestly, do I even have a chance working with someone like Elizabeth?

# VIDEO HIGHLIGHTS AND DISCUSSION POINTS

## 2. DOUBLE STANDARDS IN PERFORMANCE APPRAISALS: BALANCING WORK, FAMILY, AND GLOBAL TRAVEL

In this video, John and Elizabeth meet for a scheduled performance appraisal discussion. Their meeting highlights the difficulties of balancing work and family life. It also provides an example of how a manager can “talk the talk” but is unable to “walk the walk.” Diversity includes recognizing and valuing different approaches to work, focusing on results rather than methods. Allowing employees the flexibility to find creative ways to meet their objectives empowers them to reach their full potential.

### VIDEO DEBRIEF

Elizabeth starts the meeting off well. She:

- is warm and friendly, setting a comfortable tone for the meeting;
- appears to be genuinely interested in John’s personal life;
- allows John to provide an overview of his own performance; and
- compliments John on his successful efforts in a difficult market.

However, as the meeting progresses, it becomes clear that Elizabeth is merely mouthing the phrases of a culturally sensitive manager and organization without a true understanding of them. She:

- criticizes John for the personal life choices he has made while blatantly ignoring the fact that despite these choices, he has met all his set goals and objectives and stayed within budget. She completely fails to appreciate John’s exceptional capacity to balance creatively his work and personal life;
- ignores the evidence of John’s capacity to motivate his team and his willingness to give them credit for the team’s accomplishments rather than take it all himself;
- not only fails to appreciate the creative work-life balance John has achieved, but appears to resent the fact that he has been able to do so;

- appears to be more concerned with how John does things than with the results of his choices;
- fails to appreciate the connection between John's professional development objectives and his choice to further his education;
- expresses empathy regarding John's personal life stresses (his daughter being sick, his father moving in), while not appearing to have a genuine concern. She says that she "understands" his situation and "supports" him, yet she demonstrates no such understanding or support, modeling an inconsistency between her words and her actions. Such behavior is antithetical to the essential need to build an atmosphere of trust and respect for all employees;
- expects John to make the same choices she has made in her own career and appears to resent his capacity to juggle successfully;
- brings complaints to him from other employees having already made her mind up about their veracity and makes no attempt to listen to John's valid explanations. By repeating criticisms from John's colleagues, she undermines teamwork and trust;
- recommends that John curtail his personal life activities despite clear evidence that they have in no way interfered with his ability to achieve superior business results. Such recommendations would be appropriate only in the case of an employee whose work life was being negatively impacted by his outside activities;
- states that their organization is focusing on customer satisfaction; nonetheless, she exhibits more concern with whether John's subordinate followed company procedure than with whether the customer's needs were ultimately met;
- completely fails to respond to John's comment about a procedure being "cumbersome", again showing more concern that company procedure be followed than a willingness to question the effectiveness of a procedure;
- exhibits an inflexible, mechanistic, bureaucratic philosophy which serves to stifle employee creativity;
- completely fails to see the connection between John's situation and the organization's stated policy of encouraging work and family life balance;
- characterizes John's personal needs as "preferential treatment," ignoring his statements about working at home when he leaves early;
- speaks of fairness without taking into account that fairness does not require that all employees be treated exactly the same;
- criticizes John for speaking up against insulting behav-



ior toward women;

- makes it impossible for John to manage in the way he wants (and has proven is effective) unless he conforms to company procedures;
- gives John a rating of merely “fully competent” despite the fact that he has successfully met his objectives on time and under budget;
- leaves John without an objective standard for measuring his own performance. She has not defined her expectations of him and has not communicated her concerns to him as they arose. When John expresses confusion about how he is being judged, she criticizes him and states that it is his responsibility to understand how he is evaluated; and
- refuses to review or change her evaluation until after one year.

John handled this meeting well. He:

- gives credit to his team for their efforts which enabled him to meet his objectives;
- responds to Elizabeth’s comments in a calm, rational manner, despite his obvious disappointment;
- clearly explains the thinking behind his handling of the situation involving his subordinate, who took a risk in order to satisfy a customer;
- is a manager who supports his team and works to empower his subordinates to make decisions to meet the needs of customers;
- appropriately feels that it is important to allow an employee to take reasonable risks and not punish them if they make mistakes in the process;
- repeatedly points out to Elizabeth that the standard by which he should be judged is whether or not he and his team are growing the business, meeting the needs of customers, and getting the work done in a timely fashion; and
- attempts to obtain clarity from Elizabeth about her expectations of him.

On the other hand, he:

- may need to think a bit more about how to improve his relationship with members of other teams. His comment that “some people just like to hear themselves talk” leads one to wonder if he might treat members of other teams with a bit of arrogance, that may be contributing to their negative view of him and his team;
- needs to think about how his team fits into and interacts with the other members of the organization, even though they are clearly outstanding performers;

- may be a bit of a maverick who feels that rules and procedures do not apply to him and his team members. If he felt that the rule that his subordinate did not follow was cumbersome, it was incumbent on him to try to take some action to change or modify that procedure, rather than merely give his subordinate permission to go around it; and
- he may have been imposing U.S. values on their Chinese colleagues. He may need to think about how he could negotiate working with a set of norms with which both cultures could feel comfortable.

### DISCUSSION QUESTIONS FOR THIS CASE:

- What did Elizabeth do well in this meeting? What could she have done differently or better?
- What did John do well in this meeting? What could he have done differently or better?
- Did Elizabeth rate John appropriately? Why? Why not?
- Was Elizabeth genuinely concerned with the pressures John faces? Which words or actions make you think so? What are some examples that support your opinion?
- Are John's outside activities interfering with his ability to perform?
- What is John's management philosophy? What do you think about it?
- What is Elizabeth's management philosophy? What do you think about it?
- What kind of management philosophy does your organization have?
- How would John's performance be viewed in your company?
- Might Elizabeth have some underlying issues that affect her perception of and communication with John as well as her rating of his performance? What issues might these be?
- What is an alternative way that Elizabeth could have approached John with her concerns?
- How might Elizabeth have more effectively handled the resentment she senses from John's colleagues regarding travel?
- What is an alternative way that Elizabeth could have viewed John's decision to support his direct report who took a risk to resolve a customer problem without following standard company procedure?
- Does Elizabeth understand the meaning of diversity as a business strategy?

**GENERAL DISCUSSION QUESTIONS:**

- Do people in your organization have work, family, personal, and travel needs to balance? How are they being handled now? Are individuals in your organization penalized for using telecommuting and flexible work options to help them balance these needs?
- How can individual workers and teams effectively balance work, family, personal, and travel needs? What should be the standard to judge whether an employee's work and personal needs are being balanced appropriately?
- How should managers regard requests from employees for flexible work hours and travel arrangements? How can organizations monitor these requests to ensure that they are fair?
- How can organizations ensure that employees are not penalized for taking advantage of flexible work options or making creative arrangements to balance their work and personal lives? How can organizations ensure that employees do not abuse the flexibility they are offered?
- What are some business reasons for your organization to help employees balance their work and personal life?
- Can you think of an example in your organization in which treating all employees the same might result in inequities?
- What are some principles that your organization claims to stand by yet informally violates?
- Do managers in your organization empower their direct reports to make decisions and then stand by them when they do so? Do managers in your organization support risk-taking behavior?
- Have you, or has anyone on your team, ever had to deal with culturally insensitive remarks coming from other colleagues or from a client? How did you handle it?
- If you perceived the comments or behavior of a client of another culture as sexist, would you know what to say or do? What might deter you from expressing your opinion? What might happen if you choose not to express your feelings?
- What constitutes cultural insensitivity when U.S. employees deal with non-U.S. colleagues or clients and their cultural norms? Do you know which of your behaviors might be perceived as culturally insensitive by clients/colleagues of other cultures?
- What policies and practices should your organization implement to avoid or minimize the issues surfaced in this video? What can you do personally?

### TIPS FOR TEAMS BALANCING WORK/FAMILY/PERSONAL/TRAVEL NEEDS:

- Teams may want to consider limiting travel if work can be successfully accomplished via conference call or other means.
- Teams should be empowered by management to make decisions around work/family/personal/travel issues based on balancing their needs and the needs of the organization.
- Managers should endorse decisions made by these teams as to how they will manage their work as long as the job gets done.
- Managers should stay abreast of which options their direct reports are utilizing, and keep in close contact with team members to ensure balance and fair use of these options.
- Managers should stimulate a climate of open communication so individuals feel able to speak up when the system does not seem to be working.
- Flexible work options must become an accepted part of the organizational culture so that managers are enabled to understand and support flexible options for workers without a worker's utilization of these options having an adverse effect on his or her performance appraisal.

PREVIEW

# KEY LEARNING POINTS

1. In today's world, family structures are dramatically changing. The percentage of traditional families – with a working father and homemaking mother – is on the decline. At the same time, the number of dual career families and single working parents is rising. In addition, increasing numbers of employees are caring for elderly or dependent adults. As a result, the pressures of balancing work and family issues are becoming more pervasive and more varied.
2. Many employees are increasingly demanding that employers recognize their need to balance their work and personal life. In order to remain competitive, especially in this extremely tight labor market, employers must take these concerns seriously by creating cultures and programs that support achieving balance. Such culture change begins with clear, visible senior leadership support, and fair, consistent application of flexibility policies and procedures.
3. Managers should not discourage employees from using flexible work options and finding ways of working that work for them. Employees should be encouraged and supported in finding creative ways to get their work done while successfully balancing personal matters as well.
4. Contemporary technology enables many employees to work from off-site locations and to use flexible working schedules. The added benefit is that employees working non-traditional hours can provide service to customers in different time zones and during off-hours.
5. Managers of some of today's leading organizations recognize that employees who have rich, rewarding personal lives become more productive, creative, and satisfied employees. They have created cultures and instituted policies and practices that encourage employees to have personal and professional lives that are equally fulfilling.
6. Allowing employees the time to engage in and enjoy the various aspects of their life increases job satisfaction, team effectiveness, and overall productivity. Organizations should create cultures and systems that encourage and enable employees to have personal and professional lives that are both fulfilling.

7. When managers support employees in their efforts to balance their work and personal lives, it sends a message to employees that they are valued and that there is a concern for their needs. Employees feel that they are being viewed by their organization as whole people, which is the message of a diversity management strategy. Sending such a message increases loyalty to the organization and thereby helps organizations to retain skilled employees.
8. Work/family and work/personal issues are both employer and employee issues. An organization's failure to support employees effectively in balancing these needs may result in an inability to recruit and retain skilled employees. Organizations that wish to retain skilled and qualified employees will need to become sensitive to these pressures and find creative ways to enable employees to balance their work, personal life, and travel demands. Being open to a variety of solutions in the context of ensuring that the job gets done is critical.
9. Organizations must accommodate the needs of employees who may not have family care issues, but still have personal or career development obligations they wish to meet, such as personal relationships, education, and community service.
10. Flexible work options, such as telecommuting, can put a strain on team relationships if trust and respect are not built. In a true team setting, individuals are encouraged to work to understand each other's work/life balance needs, develop a holistic strategy for getting their work accomplished, and devise a fair way to accommodate each individual's needs as much as possible. Organizations can encourage team members to support each other by finding creative ways to provide rewards and recognition for those employees who from time to time pick up the slack for others. Recognizing the tendency of people to feel that others are getting a "better deal" than they are, trust and respect are crucial to solving the various conflicts that often arise around the issue of work/life balance in the workplace.
11. Employees and managers should be respectful of other employees' schedules. For example, whenever possible, meetings should be scheduled at specific times, and starting and ending times should be adhered to.

12. Employees should be rated and rewarded on their contributions, not on “face time” or work and travel schedules. Performance, defined as both bringing in the numbers and doing so in a way that builds staff capability and interpersonal relationships, is the bottom line. To prevent colleagues from building resentment about employees that take advantage of flexible work options, managers must emphasize the importance of bottom-line results, rather than “face time.” Complaints about a colleague’s work hours should not be validated in the absence of evidence of a failure to get the job done.
13. Treating employees fairly does not mean that all employees have to be treated in exactly the same manner. Organizations should strive for fair treatment, which includes considering a diversity of strengths, needs, and motivators, rather than treating all employees in the same way. Hiring a diverse workforce, yet assuming that all employees have identical needs and life circumstances, will inevitably reinforce a dominant norm and the inequities experienced by those who do not conform to it.
14. Managers should support their direct reports by giving them the power to make flexible decisions to meet customers’ needs; following standard company procedures may not always be the best way to resolve a problem. Moreover, requiring that all employees handle their work in exactly the same manner can stifle employee creativity and foster an environment in which employees are unable to take initiative.
15. Managers need to enable their direct reports to take reasonable risks and not punish them for their mistakes. A willingness to take a risk is a great way to find new and better ways of solving problems. Encouraging new ideas enables organizations to leverage diversity effectively and gain competitive advantage. Innovative employees who try something new need to be supported, not stifled.
16. Organizations need to train managers in managing and developing people effectively. Organizations must evaluate, recognize, and reward managers based on their ability to utilize and develop fully their employees.
17. When interacting with clients/colleagues of another culture, imposition of American values is never appropriate. It is important to be sensitive to their cultural norms. However, raising issues with clients and colleagues from

other cultures, and negotiating norms that make all parties involved feel comfortable, is appropriate when handled well.

18. Managers should never make judgments about an employee's behavior based solely on hearsay.
19. Managers should listen closely to their employees' needs and concerns, and recognize that while they can often provide the wisdom of their own experience, they can also learn something from their reports' experiences as well.
20. Performance standards need to be clearly and collaboratively defined by the employee and his or her manager and performance criteria should be clearly communicated to employees in advance of the review process. This is important to building trust and mutual understanding. Engaging in a dialogue about goals, objectives, and standards can reduce confusion and build trust, ownership, and mutual understanding. Each employee's performance should be reviewed on an ongoing basis, not just during the formal performance review;
21. Discussions of an employee's performance and potential for advancement need to include both how to leverage existing strengths and address areas that need improvement. To assist employees in understanding their potential for advancement and to evaluate objectively employees' strengths and weaknesses, a 360° feedback process is crucial. The 360° feedback should come from internal and external customers, direct reports, peers, and supervisors. Part of this feedback should also come from external individuals who have nothing to do with the organization, but whom the employee knows and selects.
22. Managers and other employees must be thoroughly educated in the business benefits of diversity. While most managers can recite reasons for valuing diversity, many still do not fully understand it. They should receive training to help them understand, value, and appreciate the increasing diversity in the U.S. and globalization of organizations worldwide in order to build trust and respect among diverse employees, customers, and stakeholders. Moreover, managers and employees at all levels should be held accountable for understanding and valuing diversity; it should impact their performance evaluations, their compensation, and their assignments and promotions.



# VIDEO DEBRIEF EXERCISES

## INTRODUCTION

While each video makes a strong presentation, its highest value can be attained through energetic, impactful and effective debriefing. It is toward this end that we offer these ideas.

- It is absolutely crucial that facilitators or anyone who uses these videos become very familiar with the video, video highlights, and key learnings. Given that you may choose to use the videos and their associated materials in a variety of ways, it is important that your discussion or group activity focus on the video highlights and key learnings for each video scenario.
- It is suggested that video scenarios be shown not only in training sessions, but also in different forums, e.g., staff meetings. Dedicating time (45 minutes to 1 hour) to each individual scenario allows for full dissection of that scenario's particular issues. In addition, use of this option demonstrates a commitment to sustain dialogue around diversity and other critical organizational issues.
- The scenarios can be integrated into other types of training in order to link diversity to concurrent organizational initiatives. For example, the videos could be used in communications, team building, conflict resolution, coaching, mentoring, leadership, performance management, career planning and development training. Again, such uses help to demonstrate the importance of diversity as an overall business strategy and may help to alleviate the perception that diversity is an isolated program.

Outlined below is the general sequence of steps we have found most effective in the overall utilization and presentation of the videos.

1. Give a very brief overview of what the participants are about to watch. For example, the video we are going to watch is entitled *Do We Speak the Same Language?: Should Language and Cultural Style Impact Performance Evaluations?* and it is about how culture and language could impact the performance evaluation process, as the title indicates.

2. Pass out the Character Profiles.
3. Show the Video.
4. Conduct the Debrief Exercise and/or exercises related to the video highlights.
5. Discuss the Key Learnings.
6. Hand out the Key Learnings.
7. Wrap-up.

PREVIEW

## VIDEO DEBRIEF METHODS NINE DEBRIEF EXERCISES

Over the years ARMC has used a variety of methods to debrief the videos. Each method is listed below and discussed in detail in the following pages. You should select the one that would be most appropriate for the group with which you are working.

1. Interactive “Hit and Run” Exercise
2. Supporting a Position Exercise
3. Role-Play Exercise
4. Fish Bowl Exercise
5. Empathy Exercise
6. Brainstorming/Consulting Exercise

*Additional exercises for use with specific videos are also included. These Supplementary Debrief Exercises are:*

7. Employment Interview Exercise
8. Exit Interview Exercise
9. Preventing Stereotypes Exercise

Finally, associated with each video are video highlights and unique key questions which are very useful in involving participants in developing understandings, skills and solutions to the key issues presented in the videos.

## INTERACTIVE “HIT AND RUN” DEBRIEF EXERCISE

**Note:** ARMC’s experience shows that one of the most effective methods to debrief these videos is the Interactive or “Hit and Run” method. In order to debrief effectively in this manner, there must be two trained facilitators who are thoroughly familiar with the videos.

**Time:** 45 to 60 minutes

**Materials:** Character Profiles; Key Learnings; Video; and VCR; (Optional: Video Highlights and Key Questions)

**Instructions:**

1. Give a brief overview of what the participants are about to watch. For example, the video we are going to watch is entitled *Double Standards in Performance Appraisals: Balancing Work, Family and Global Travel* and it is about the challenges colleagues have in balancing their personal and professional lives, in the context of double standards for performance in the workplace.
2. Hand out the Character Profiles.
3. Ask participants to watch for ways in which the characters could have improved their communication. You may also invite participants to take notes as they watch.
4. Watch the video.
5. Each facilitator assumes the role of one of the characters. For example, one would approach a participant for advice, opinion, insights, etc. If she/he takes on the role of the manager of the individual in the video, she/he might say to the participant, “You are my manager, mentor or friend, how do you think I handled the situation? What did I do well? Where do I have opportunities to improve?”
6. After some dialogue, the facilitator in the role of the direct report would approach another participant and say, “You are my mentor or my friend, what do you think of the meeting I just had?” The two trainers would alternate turns asking questions or challenging positions stated until they have each approached three or four participants individually.
7. Then, the facilitators would open the discussion to the group by saying something such as “Does anyone else have

any insights or opinions they would like to add?" Give others, particularly those who were not approached, an opportunity to share their thoughts, advice or questions.

- 7A. At this point, the facilitator could further debrief the videos using the Video Highlights and associated Key Questions.
8. Facilitator should ask participants what they obtained from the video and interaction.
9. Hand out the Key Learnings. Allow participants a brief time to review and respond to them.
10. Facilitators should wrap up with appropriate concluding comments.

PREVIEW

## SUPPORTING A POSITION EXERCISE

**Time:** 45 to 60 minutes

**Materials:** Character Profiles; Handout (Questions and Closing Statements); Key Learnings; Video; and VCR; (Optional: Video Highlights and Key Questions)

**Instructions:**

1. Give a brief overview of what the participants are about to watch. For example, the video we are going to watch is entitled *Double Standards in Performance Appraisals: Balancing Work, Family and Global Travel* and it is about the challenges colleagues have in balancing their personal and professional lives, in the context of double standards for performance in the workplace.
2. Hand out the Character Profiles.
3. Ask participants to watch for ways in which the characters could have improved their communication. You may also invite participants to take notes as they watch.
4. Watch the video.
5. Form four sub-groups and assign each of the four sub-groups a role (Manager, Direct Report, Manager's Manager and Direct Report's Mentor). Explain to them that they must place themselves in the roles they are assigned despite their personal sympathies or desires to take a different role. In short, they have to assume the character and role of the person assigned to them. (20 minutes in the sub-groups)
6. Provide the following instructions to participants, along with the Handout:
  - As you discuss the video and your role in the upcoming interaction, please keep in mind the manager's and direct report's final thoughts that appear at the end of this guide. It is important for all sub-groups to discuss their own feelings and thoughts. Identify someone in your sub-group to record the thoughts that are shared.
  - **To the sub-group representing the manager:** For those of you who are the manager, you are going to approach your immediate manager to discuss your feelings and seek advice. Try to reach a consensus on the questions; however, if you can't, that's fine. Use the questions in your handout as a guide.
  - **To the sub-group representing the direct report:** Each of you has now become the direct report. As the

direct report, you are going to approach your mentor to discuss your feelings and seek advice. If there is a consensus in your group about how you feel, fine. If there is not, that's okay also. Use the questions in your handout as a guide.

- ***To the sub-group representing the manager's manager:*** The manager has just described to you the meeting with the direct report. Review the questions in your handout and be prepared to advise and counsel the manager.
- ***To the sub-group representing the direct report's mentor:*** You are the direct report's mentor. The direct report has just described the scenario to you. The direct report is coming to you for insight and advice. We have provided you with a list of questions we anticipate the direct report will want you to answer. As we have said, a consensus in your group about how to respond to the questions in your handout is not necessary.

7. Reconvene the large group and discuss their insights. Facilitator should ask participants what key learnings they obtained from the video and interactions.

7A. At this point, the facilitator could enhance the discussion using the video highlights and associated key questions.

8. Hand out the Key Learnings. Allow participants a brief time to review and respond to them.

9. Facilitators should wrap up with appropriate concluding comments.

### ***Manager's Closing Statement***

(Facilitators Must Provide)

### ***Direct Report's Closing Statement***

(Facilitators Must Provide)

### ***Direct Report's Questions***

(Given to group representing the Direct Report)

- As the direct report, what is your reaction to your meeting with your manager? To your manager's closing comments?
- How do you feel?
- How will you approach your mentor?
- What will you say to your mentor?
- How will you describe the situation to him/her?
- What advice will you ask for?

***Manager's Questions***

(Given to group representing the Manager)

- As the manager: What is your reaction to your meeting with your direct report? To your direct report's closing comments?
- How do you feel?
- How will you approach your manager?
- What will you say to your manager?
- How will you describe the situation to her/him?
- What advice will you ask for?
- What additional information do you need, if any, to deal effectively with this?

***Direct Report's Mentor's Questions***

(Given to group representing the Direct Report's Mentor)

- What is your opinion about the direct report's attitude and behavior?
- What did you see or hear that supports your opinion?
- What is your role, if any?
- What questions do you have for the direct report?
- What advice will you give to her/him?

***Manager's Manager's Questions***

(Given to group representing the Manager's Manager)

- What is your opinion about the manager's behavior and attitude? What did you see or hear that supports your opinion?
- What is your role, if any?
- What questions do you have for the manager?
- What advice will you give the manager?



## ROLE-PLAY EXERCISE

**Time:** 45 to 60 minutes

**Materials:** Character Profiles; Key Learnings; Video; VCR; (Optional: Video Highlights and Key Questions) and Flipcharts

**Instructions:**

1. Give a brief overview of what the participants are about to watch. For example, the video we are going to watch is entitled *Double Standards in Performance Appraisals: Balancing Work, Family and Global Travel* and it is about the challenges colleagues have in balancing their personal and professional lives, in the context of double standards for performance in the workplace.
2. Hand out the Character Profiles.
3. Ask participants to watch for ways in which the characters could have improved their communication. You may also invite participants to take notes.
4. Watch the video.
5. Divide the large group into sub-groups of 4 to 5 participants.
6. Provide participants with the following instructions:
  - In your sub-group, identify the key diversity problems and key issues. Post these on the flipchart. (20 minutes)
  - Identify what contribution each character made to the problem, if any. Identify what each character did that was positive or helpful.
  - Identify the individual with whom you are more empathetic. Why?
  - Prepare a role-play in which you demonstrate how the participants might resolve the problems you identified. Role-play the exchange within each group and discuss the results.
7. Reconvene into the large group and discuss the participants' Key Learnings. Following this, the facilitator might request a single group to perform their role-play for the group.
8. Facilitators should ask participants what key learnings they obtained from the video and interactions.

- 8A. At this point the facilitators could enhance the discussion by using the video highlights and associated Key Questions.
9. Facilitators should ask participants what key learnings they obtained from the video and interactions.
10. Hand out the Key Learnings. Allow participants a brief time to review and respond to them.
11. Facilitator should wrap up with appropriate concluding comments.

PREVIEW

## FISH BOWL EXERCISE (VARIATION OF ROLE-PLAY EXERCISE)

**Time:** 45 to 60 minutes

**Materials:** Character Profiles; Key Learnings; Video; and VCR; (Optional: Video Highlights and Key Questions)

**Instructions:**

1. Give a brief overview of what the participants are about to watch. For example, the video we are going to watch is entitled *Double Standards in Performance Appraisals: Balancing Work, Family and Global Travel* and it is about the challenges colleagues have in balancing their personal and professional lives, in the context of double standards for performance in the workplace.
2. Hand out the Character Profiles.
3. Ask participants to watch for ways in which the characters could have improved their communication. You may also invite participants to take notes.
4. Watch the video.
5. Ask for two volunteers. Each will play one of the roles portrayed in the video.
6. Divide the large group into two groups.
7. Each group will coach one of the characters in resolving the problems identified in the interaction. (20 minutes)
8. The two volunteers will perform the role-play before the large group, using the feedback they received from the group.
9. After the role-play the facilitator should debrief the participants on how well the role-play came out. Ask what key learnings they obtained from the video and interactions.
10. Hand out the Key Learnings. Allow participants a brief time to review and respond to them.
- 10A. At this point, the facilitator could enhance the discussion using the video highlights and associated key questions.
11. Facilitator should wrap up with appropriate concluding comments.

## EMPATHY EXERCISE

**Time:** 45 to 60 minutes

**Materials:** Character Profiles; Key Learnings; Video; VCR; (Optional: Video Highlights and Key Questions) and Flipcharts

**Instructions:**

1. Give a brief overview of what the participants are about to watch. For example, the video we are going to watch is entitled *Double Standards in Performance Appraisals: Balancing Work, Family and Global Travel* and it is about the challenges colleagues have in balancing their personal and professional lives, in the context of double standards for performance in the workplace.
2. Hand out the Character Profiles.
3. Ask participants to watch for ways in which the characters could have improved their communication. You may also invite participants to take notes.
4. Watch the video.
5. Divide the large group into sub-groups of 4 to 5 participants.
6. Provide participants with the following instructions: (20 minutes) Individually jot notes on your answers to these questions:
  - Toward whom did you, personally, feel most empathetic? Why?
  - What do you believe are the legitimate issues from the person's point of view?
  - What should the other person have said/done differently?
  - After each individual has made his or her notes, the group should discuss them and try to come to a consensus. List key points on a flipchart. Select a spokesperson to report back to the group.
7. Reconvene the large group. Have spokespersons present their group's advice/strategies. After the first group, the facilitator may ask if other groups cited additional strategies, in order to avoid repetitive report-outs.
- 7A. At this point, the facilitator could enhance the discussion using the Video Highlights and associated Key Questions.

8. Facilitators should ask participants what key learnings they obtained from the video and interactions.
9. Hand out the Key Learnings. Allow participants a brief time to review and respond to them.
10. Facilitator should wrap up with appropriate concluding comments.

PREVIEW

**BRAINSTORMING/CONSULTING EXERCISE**

**Time:** 45 to 60 minutes

**Materials:** Character Profiles; Key Learnings; Video; VCR; (Optional: Video Highlights and Key Questions) and Flipcharts

**Instructions:**

1. Give a brief overview of what the participants are about to watch. For example, the video we are going to watch is entitled *Double Standards in Performance Appraisals: Balancing Work, Family and Global Travel* and it is about the challenges colleagues have in balancing their personal and professional lives, in the context of double standards for performance in the workplace.
2. Hand out the Character Profiles.
3. Ask participants to watch for ways in which the characters could have improved their communication. You may also invite participants to take notes.
4. Watch the video.
5. Divide the large group into sub-groups of 4 to 5 participants.
6. Provide participants with the following instructions and appropriate handout:
  - First, brainstorm and record on the flipchart the diversity and other related issues you saw in this vignette. (20 minutes)
  - Discuss and prioritize the list; identify the top 3 to 6 issues your group thinks are the most important. Be prepared to report-out on these.
  - Put yourselves in the role of a consultant to both individuals and their company in the video. How would you recommend they resolve this situation? List your advice/strategies on the flipchart and prepare to report these out to the large group, as well. Select a spokesperson to report back to the group.
7. Reconvene the large group. Have spokesperson present their group's advice/strategies. After the first group, the facilitator may ask for additional strategies other groups cited, in order to avoid repetitive report-outs.

- 7A. At this point, the facilitator could enhance the discussion using the Video Highlights and associated Key Questions.
8. Facilitators should ask participants what key learnings they obtained from the video and interactions.
9. Hand out the Key Learnings. Allow participants a brief time to review and respond to them.
10. Facilitator should wrap up with appropriate concluding comments.

PREVIEW

## SUPPLEMENTARY DEBRIEF EXERCISES

The exercises in this Supplementary section are best used in conjunction with particular video scenarios, although you may still find ways to adapt them. The numbers of the relevant scenarios are listed in the introductions to each exercise.

### EMPLOYMENT INTERVIEW EXERCISE

**Note:** *This debrief method will be especially relevant to those scenarios that deal with issues of recruitment and retention of women, people of color, people who speak English as a second language and other non-dominant groups. Thus, it will be particularly relevant to scenarios #11, #15, and possibly #1.*

**Time:** 45 to 60 minutes

**Materials:** Character Profiles; Key Learnings; Video; VCR; (Optional: Video Highlights and Key Questions) and Flipcharts

**Instructions:**

1. Give a brief overview of what the participants are about to watch. For example, the video we are going to watch is entitled *Double Standards in Performance Appraisals: Balancing Work, Family and Global Travel* and it is about the challenges colleagues have in balancing their personal and professional lives, in the context of double standards for performance in the workplace.
2. Hand out the Character Profiles.
3. Ask participants to watch for ways in which the characters could have improved their communication. You may also invite participants to take notes.
4. Watch the video.
5. Divide the large group into sub-groups of 4-5 participants.
6. Provide participants with the following instructions:
  - Each group will develop employment interview questions that address the difficulties and tensions that potentially arise when women, people of color and those who speak English as a second language are interviewed for employment by someone of a dominant cultural group, such as White, male, or native English-