Holistic HR Know-How

The ability to intimately grasp all HR disciplines, including talent management, pay, executive compensation, health, retirement, work-life benefits, compliance, policies and ethics, and effectively partner with HR professionals at all levels.

From Outsider to Insider

When employees participate in teams in other functional organizations, they often feel like outsiders at first. This is perfectly understandable, because stepping from one corporate department to another can be like traveling to a new region. Despite a multitude of commonalities, departments have different cultures. Some even have their own vocabularies. If someone says “cascade” in a multi-disciplinary meeting, one person may envision a nature setting with water plunging over moss-covered rocks; an engineer might see a series of electrical components, while a research scientist wonders what chemical processes have to do with the subject under discussion. However, when you are asked to serve as a diversity and inclusion expert for another department or organization, learning the lingo is just one of many things you need to master. However, patience, perseverance, and a willingness to learn and listen will help you feel confident and in control much sooner than you think.

Nevertheless, you will need more than your expertise in diversity and inclusion to become a respected and valued partner. You will have to target your technical and social skills and knowledge to advance the objectives of the organization you support. If you do not learn and understand its needs, culture, language, and priorities, you will undermine your effectiveness. This is especially important when supporting human resources professionals.

Jim Norman, former vice president of diversity and community involvement for Kraft Foods Group, cautions that the growing complexity and competitiveness of the business environment is driving the integration of diversity into HR and business practices. It is one of many reasons for strengthening and increasing your connections to your colleagues across the organization, which is why it has its own competence, “Holistic HR Know-How.” We define this competency as

The ability to intimately grasp all HR disciplines, including talent management, pay, executive compensation, health, retirement, work-
Your pursuit of “Holistic Human Resources Know How” begins with developing a deep understanding of human resources and what makes a HR professional successful and exceptionally capable. You have to determine what leaders of your HR function see in their minds’ eyes when they hear that an employee or candidate is “highly competent.” An overview of a few of the competency models embraced by HR professionals allows us to see competency from their perspective and provides insights into how we can become more effective contributors to HR.

The first part of this chapter focuses on HR and their expectations of diversity practitioners. The second part offers guidance on how to meet those expectations by developing the right competencies. We also discuss the contributions that respected, sought-after diversity and inclusion practitioners furnish their HR organizations, the skills, behaviors and expertise they employ to create and implement strategies and tactics, and how they apply their diversity and inclusion initiatives to strategically advance their companies’ goals and objectives.

How the HR Industry Views and Defines Competencies

David Ulrich and his team have studied HR competencies for more than 25 years. Using data gathered from 60,000 HR professionals and line managers, Ulrich, a professor at the Ross School of Business at the University of Michigan, has published fundamental research that has shaped the discipline’s latest approaches to competency and performance evaluation. He defines competencies as the attributes and behaviors that “increase personal reputation and business performance.”

Among his most important findings is the lesson that HR should focus on three key resources when assessing performance:

- Talent (competence, commitment, contribution, and the ability to find meaning in work).
- Culture (organization capabilities that enable [HR and company leadership] to shape an identity outside the company and [the most productive] pattern of behavior inside the company).
- Leadership (leaders through the company who are focused on the right things).

According to Professor Ulrich, HR professionals function as “architects of talent, culture, and leadership [who] help line managers deliver what they promise” and turn “aspirations into actions.”

The HR Profession’s Competency Models

In 2012, the Society of Human Resource Management (SHRM) unveiled its revised competency model. Encircling practitioners at all levels and companies of all sizes the new model, according to SHRM’s Director of Thought Leadership Alexander Alonso, includes more parameters than Professor Ulrich’s model. Based on the input of approximately 33,500 HR professionals, Henry G. Jackson, SHRM’s CEO, explains that the Society created the model to help HR professionals “understand how [they] should be performing at every stage of [their] career[s].”

Since the “model is predicated on the belief that ‘knowledge’ together with certain ‘behaviors’ are needed for continued success in HR,” it is an ideal source of insights that diversity professionals can use to build “Holistic HR Know-How.”

SHRM bases its model on a simple concept “Knowledge + Behavior = Success” and includes one technical competency and eight behavioral competencies. The nine competencies, defined in Table 1, are “individual characteristics, including knowledge, skills, abilities, self-image, traits, mindsets, feelings, and ways of thinking, which, when used with the appropriate roles, achieve a desired result.”

Table 1: SHRM’s Nine Competencies for HR Professionals

<table>
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<tr>
<th>Competencies</th>
<th>Definition</th>
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<tr>
<td>HR Technical Expertise and Practice</td>
<td>The ability to use HR principles and practices to serve the needs of the enterprise. These include compensation, talent management (e.g. recruitment and selection), training and development, employee engagement, and compliance.</td>
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<tr>
<td>Relationship Management</td>
<td>Managing human interactions to drive service and organizational success.</td>
</tr>
<tr>
<td>Consultation</td>
<td>Providing direct guidance to organizational stakeholders (e.g., employees, company leadership, and community leaders) seeking advice on numerous issues related to HR, its impacts, and its strategic strengths.</td>
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</table>
The competencies described do not stand on their own; they all work in combination, and HR practitioners have to be prepared to bring a variety of tools and approaches to address problematic issues. As Norman observed, there is a greater need for integration than ever before. “We face multiple kinds of challenges every day,” he says, “Everything has to be integrated because there’s more demand on our resources, time, and expertise.” Norman’s strategy is to leverage interaction and collaboration to create more benefits from fewer resources. Similarly, we need to view our competencies as an integrated whole.

The Value of Holistic Approaches

Just like the previous HR models, Diversity Best Practices Eight Core Competencies are an integrated package of capabilities. If you want to lead and succeed now and in the future, you must embrace the whole tool kit. The competencies are a unified whole.

Throughout the public and private sector, organizations expect their leadership and high potential employees to engage in a process of acquiring, developing, and mastering a variety of competencies to maximize their effectiveness and value to their organization. For example, the American Association of Community Colleges (AACC) expects and enables its presidents and other leaders to engage in an active, ongoing process of increasing, enhancing and integrating a set of competencies, which they define and discuss in the guide AACC Competencies for Community College Leaders. In August 2013, the AACC Board of Directors approved the latest edition of this guide, which provides a road map for driving institutional transformation and for shaping “in-house grow-your-own leadership programs.” It advances four categories of competency:

- Organizational strategy
- Institutional finance, research, fundraising, and resource management, and communication
- Collaboration
- Advocacy

Each category has subsets of competencies targeted at types of leaders:

- Emerging leaders
- New CEOs (first three years on the job)
- CEOs that have been in their jobs for three or more years

According to Pamela L. Eddy, associate professor of the College of William and Mary, eight years of critical reflection on the original set competencies underscored the value of “viewing the competencies more holistically, [which provides] a different perspective and approach to leadership development and leadership enactment.” Dr. Eddy observes that approaching leadership from a multidimensional perspective enhances our ability to manage issues in increasingly complex institutional environments. Success requires the “application of contextual competency,” which is the ability to bring the most appropriate set of tools to tackle an issue. According to Dr. Eddy, “the focus is no longer on how best to address a campus context by selecting the appropriate leader for the time, but rather on how to recognize that individual leaders can acquire a wider range of leadership approaches.” Likewise, top business professionals should develop a range of expertise and abilities to become capable of meeting a wide variety of challenges.

Leaders and high-potential employees who obtain these multiple perspectives understand how competencies operate in combination and can “identify patterns of alignment.” Dr. Eddy asserts that there are four “clusters of competencies,” which underscore the importance of these holistic competencies. The clusters include inclusivity (dynamic, shared leadership), “framing meaning” (helping the enterprise understand activities in terms of the “overarching organizational strategy”), “attention to the bottom line” (“achieving the greatest outcomes possible with limited resources”), and “systemic thinking” (seeing “connections between actions and reactions, even when not most evident”). Since diversity professionals face issues with similar complexity, understanding these clusters enable us to more effectively drive diversity throughout our organizations, working in partnership with our human resources colleagues.
Diversity practitioners also acquire a clearer picture of “Holistic Human Resources Know How” if we apply Professor Eddy’s holistic model to SHRM’s competency model to see how competencies work together as portrayed in Figure 1.

**Figure 1: SHRM Competencies Aligned with 4 Holistic Clusters**

As we can see, the HR resources competencies appear in at least two of the clusters and some, including diversity and inclusion, appear in all four. Likewise, as one would expect, each HR core competency plays a major role in driving effectiveness in at least two or more of the clusters.

**Six Competency Domains**

In *HR Competencies: Mastering the Intersection of People and Business*, Professor Ulrich introduced concepts that facilitate taking HR competencies from idea to action. His research revealed a need to “focus not just on the knowledge and ability of the HR professional, but on what the HR professional becomes through the use of that knowledge and ability.”

Ulrich and his colleagues analyzed survey data on 130 items from more than 10,000 HR professional to identify patterns. Since the analysis focused on people in action, the six competency domains that emerged described the six roles that highly competent HR professionals need to perform to be successful. These depictions provide well defined, easy to understand portrayals of the attributes of a fully competent HR professional. We identify them in Table 2.
Table 2: Competency Domains and Characteristics

<table>
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<tr>
<th>Domain</th>
<th>Characteristics</th>
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<tr>
<td>Credible Activist</td>
<td>Earns credibility from co-workers and leaders who respect and admire the credible activist; nonetheless, he or she is willing to challenge assumptions and take stands that are not always popular and conventional.</td>
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<tr>
<td>Culture &amp; Change Steward</td>
<td>Recognizes that a company’s culture is revealed in a series of events and is intent on communicating and shaping culture. They are committed to integrating culture with policies and procedures, driving cultural change, coaching managers on how to help their reports manage uncertainty, and portraying the culture to make it real to employee.</td>
</tr>
<tr>
<td>Talent Manager/Organization Designer</td>
<td>Understands and implements talent management, organization design, and how they work in tandem; masters competency requirements, helps guide the progress of employees, and aligns capabilities with the customers’ needs and marketplace dynamics.</td>
</tr>
<tr>
<td>Strategy Architect</td>
<td>Knows business trends and their impacts, is committed to the company vision, and how it can win in the marketplace. Plays an active role in creating and managing company strategy.</td>
</tr>
<tr>
<td>Operational Executor</td>
<td>Capably performs operational processes for managing people and the organization. Insures smooth operation of employees’ administrative needs, and provides operational excellence using technology, shared services, and/or outsourcing.</td>
</tr>
<tr>
<td>Business Ally</td>
<td>Understands how the business works and what drives profitability. Consults with business leaders on social context to promote business success. Knows the customer, marketplace needs, and how business components work together to enable success.</td>
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These six domains should suggest what behaviors are needed to model when serving human resources. Many of them are second nature to talented diversity professionals, but many are outside a diversity professional’s typical responsibilities. However, it is very important that you prepare yourself for partnering with HR, because, as Velois Bowers, vice president of diversity and inclusion for CHRISTUS Health, reminds us, “The relationship with human resources is absolutely critical.” Velois encourages diversity professionals to work closely with HR. “We share priorities with HR and focus on many of the same issues,” say Bowers. “We need to align our programs, strategies, and our people.”

Developing Your Holistic HR Know

Bowers lays out the challenge, but we know what we are up against. We have touched on the attributes that HR leadership expects from its workforce and the competencies they look for when identifying high-potential employees in their organization. You also should have a comprehensive sense of what is expected if you want to earn a seat at the HR table as a partner. Much of the remainder of this chapter focuses on how to meet those expectations. We will look at this topic from three perspectives (what you need to know, how you should partner, and what obstacles you need to avoid). We will look at these key issues in terms of three points in a successful diversity practitioner’s career (early-career, mid-level, and senior-level).

Intimately Knows HR: What You Need to Know

Throughout the first section of this chapter, we have discussed the importance of knowing the HR organization, its functions, responsibilities, capabilities, goals and objectives, culture, and concerns. Without this knowledge, the diversity professional cannot earn a seat at the HR table, serve as a valuable partner, understand its priorities and programs, represent the diversity and inclusion organization brand with excellence, and perform as a liaison between the two organizations, keeping leadership informed about what the other group is doing. The first step to developing this “Holistic HR Know-How” is to intimately know human resources.

Early-Career Diversity Professional/Individual Contributor

As an early-career diversity practitioner, you should be busy developing a thorough understanding all HR responsibilities from ensuring ethical practices, developing work-life benefits, and enhancing recruitment and retention to managing executive compensation, creating performance policies, and ensuring compliance with employment policies. Throughout your career, you will continually expand and enhance your HR knowledge, expertise, and support of the HR function.

You must also focus on the unique characteristics of your organization’s HR function and have a working familiarity with its policies, procedures, practices, and processes. Be sure to reach out and introduce yourself to your HR colleagues, especially the key players. It is important for you to identify and develop working relationships with the people who have influence in the organization, who are helpful and productive collaborators, and who can be counted on to carry diversity and inclusion messages, its practices, and policies throughout your company.

As you acquire HR knowledge, enhance your HR expertise, and demonstrate your excellence as a strong contributor to the advancement of HR, you will be able
to leverage your reputation and expertise to increase your participation in HR’s programs and objectives. This will allow you to use your expertise to facilitate your company’s diversity and inclusion programs, plans, and strategies to meet or exceed its HR standards and requirements.

**Mid-career Professional/Leveraged Contributor**

As a mid-career practitioner, it’s important to continually improve your knowledge about HR, hone your HR expertise, and become more active in HR professional organizations. You accomplish this by keeping up with HR literature and research, knowing the latest trends, and by offering informed and knowledgeable insights to HR leaders and experts on the latest HR issues and practices.

With a thorough understanding of the HR function, make sure that any diversity strategies or programs reflect the HR function’s standards and requirements. One way to accomplish this is, whenever possible, to use the HR function’s reports, presentations, and tools as a template for diversity programs and plans. Doing so enables you to communicate the diversity goals and tactics in a way that is easily and readily understandable to your HR colleagues. It also establishes your HR competence by making sure that any diversity initiatives leverage the organization’s total HR system and demonstrates your operational capabilities in both HR and diversity.

At this point in your career, you can leverage your experiences and relationships with HR colleagues in the recruitment and retention of a highly competent and diverse workforce as well as in the development of a pool of exceptional, multicultural talent. As you work alongside HR and other colleagues across the organization – recruiters, hiring managers, trainers, supervisors, managers, and others – you will want to use diversity best practices in all aspects of talent management to demonstrate your expertise as well as convictions for both D&I and HR missions.

**Senior Executive Professional/Leader**

All of these efforts to support HR have been instrumental in helping you become a senior-level diversity practitioner. You, however, cannot stop here but must continue to be diligent in enhancing your “Holistic HR Know-How.” This requires using your reputation and expertise to collaborate with HR to create and maintain HR policies, practices, and procedures that are free of systemic bias toward anyone due to their differences.

Your role as a credible activist, to use Professor Ulrich’s terms, has, up to now, helped drive your success. However, as diversity practitioner, you must continue to demonstrate your proficiencies in your day-to-day tasks, as well as in substantive strategic, policy, and programmatic discussions. You can support your daily activities by engaging the most astute and forward-thinking HR colleagues in developing departmental and corporate tactics and strategies.

With a reputation for fairness, diligence, and knowledge, as well as the ability to speak HR lingo and collaborate with HR staff, you can remain a strong advocate for the diversity strategy. Senior diversity leaders must be able to effectively challenge HR practitioners from entry-level managers to the vice president of human resources when they fail to incorporate diversity and inclusion issues into all planning efforts, program development and implementation activities, communications, and decision-making.

**Partners with HR to Achieve HR Effectiveness: How You Should Partner**

In the previous several paragraphs, we have developed a vision of a successful career, which assumes that your HR colleagues view you as a knowledgeable, savvy partner who is willing to pitch in when needed, provides honest, insightful counsel and information on diversity and inclusion, and understands the HR discipline (its tools and processes.) Demonstrating your value as an HR partner is essential to your success at all levels of your career.

**Early-Career Professional/Individual Contributor**

At this point in your career, you have been proactive in reaching out to your HR colleges and helping them succeed. You are developing collaborative relationships with the HR department and your HR colleagues, especially those who have significant potential and are strongly committed to your company and its success. It is important that you identify the people who share a strong work ethic, sense of openness and fairness, and commitment to the development of a productive, informed workforce.

You will use these relationships to remain aware of HR activities, programs, and plans. It is also important that you share this information with your diversity and inclusion colleagues and the organization’s leadership. As a diligent and inquiring student of HR, you are learning to be an informed partner who understands what should be done and how to do it. However, you do not hesitate to ask questions to enhance your understanding. As you study HR, treat the subject as you would prepare for college exam following the rule of PREP. That is, probe, retain, evaluate, and ponder the lessons you learn about HR. Be sure to also probe and evaluate diversity and inclusion planning and program development to ensure that HR’s concerns, needs, and policies are reflected. And be prepared to ask insightful...
questions and provide useful, relevant information on HR when working on projects in your particular area of diversity management.

A key way to demonstrate your expertise and develop more is to be alert to potential opportunities for including HR in diversity programs and activities. Also, do not forget to do the reverse; That is, look for diversity and inclusion opportunities in HR. Make sure to bring your discoveries to the Chief Diversity Officer, your direct supervisor, the director of your function or to the HR leadership. Of course, take your organization’s culture into account in the way you push your ideas up the chain of command.

**Mid-career Professional/Leveraged Contributor**

As a mid-level diversity practitioner, continue to increase your collaborative relationships with your HR colleagues by helping them understand, appreciate, and apply diversity and inclusion best practices in HR efforts. Make sure that they understand D&I's relevance and value to HR, the company, and its stakeholders.

Since you have continued to study and understand how HR operates, including the decision-making process, and the key people who influence the process and make the final determinations, you’ll be able to avoid pushing ideas that will generate little support and enthusiasm. This knowledge will make sure that you successfully raise and promote strong ideas and recommendations that have great potential and can gain the interest of the people with the power to execute them.

Being a credible HR partner means supporting strategic recruitment and being aware of reliable sources of multicultural talent while engaging recruiters in developing, coaching, and leveraging a pool of candidates who represent a variety of populations. This kind of HR partner also participates in interest groups, alumni organizations, and professional associations to identify and recruit high-potential candidates who represent a wide variety of diversity dimensions. It also means that you will make sure that the candidates who are hired will have the opportunity to rise to the fullness of their potential, even if it means, for instance, creating initiatives that link new hires with mentors and champions.

Additionally, your knowledge of employee relations and strong social skills make you expert in affirming, influencing, and celebrating employees in the ways they most appreciate. You will seek opportunities to leverage these capabilities and to equip your HR colleagues and others to join in these efforts.

**Senior-Level Professional/Leader**

Thanks, in part, to your dedicated support of your HR colleagues, you have an abundance of allies who support you and will come to your aid without hesitation. Your colleagues in diversity and inclusion, HR, and other functions inside and outside the corporation have great respect for your capabilities, expertise, and professionalism. These internal and external colleagues view you as an advocate of HR and diversity and inclusion, a promoter of best practices in these areas, and a leader who has raised the company’s awareness of the importance, relevance, and value of D&I to business success.

Now it is important to maintain your close connections with HR while continuing to identify new ways to advance diversity and inclusion, share your discoveries with HR, and establish how these new initiatives would advance HR’s goals. You are in a position to accomplish those activities, because your counterparts in HR respect your intellect and credibility, and know that you are usually on target.

Additionally, this respect encourages HR executives, business clients, and other stakeholders to seek out your counsel in the development of HR strategy and programs. Once this occurs, and even before colleagues seek you out, you will want to leverage your knowledge, political savvy, and social capital to enhance, reshape, and redesign HR programs and strategies to ensure they are fair and inclusive.

**Derailers: What is your biggest obstacle?**

As a diversity and inclusion practitioner, you have many opportunities to learn about human resources and strengthen your links with your HR colleagues. The biggest obstacle, however, might be you. If you are early in your career, are you making the effort to become knowledgeable about HR? It is easy to feel overwhelmed when you first encounter a new discipline. Everyone in the room—except you—has been working together for some time. Some may have been colleagues for decades. They speak their own language, are comfortable with what they do and working with each other, and know what is going on.

So, it is understandable that you feel lost. What is not acceptable is not making the effort to find your way. You need to jump in feet first, ask questions, and learn what you do not know. If you hold back, you may appear bewildered, may not be able to make a contribution to the team, and may make uninformed, unwise decisions. Your lack of initiative will make it more difficult to develop useful personal connections and to recognize and seize opportunities.
Some diversity and inclusion practitioners may make it to mid-level status without developing “Holistic HR Know-How.” They may have not taken the initiative or felt they did not need to do so. They may even feel threatened and in competition with HR. If they do not acquire this missing expertise and knowledge, they will have difficulty building solid programs and systems, because they will not have the information to make them compatible with HR’s processes and procedures. They may even do serious harm to their organizations and their corporations, because, unaware of legal and ethical pitfalls, they may make damaging mistakes out of ignorance.

If they do not make the effort to develop strong relationships with HR, their passivity may be interpreted as a lack of commitment or dedication to a personal agenda. Accordingly, they will lose HR support, and potential allies, and give the impression that they are in competition. This can leave business leaders to conclude that diversity and inclusion and HR are not aligned, wasting resources, and becoming unproductive and ineffective.

Senior level diversity practitioners who are ignorant about HR often find themselves adrift without HR allies and advisors. Their lack of awareness leaves them vulnerable to mistakes and misspent effort. It is likely that they will repeatedly fail to strategically align diversity and inclusion programs, processes, and practices with HR’s programs, processes, and practices. This means they will always be working at cross-purposes and making little headway.

Clearly, “Holistic HR Know-How” is vital if you are to succeed at any level as a diversity and inclusion practitioner. This lack of awareness and understanding is dead weight, constantly holding one back when it is not dragging one down.

Conclusion

Fortunately, these pitfalls are easier to avoid if you are willing to take charge of your career and plan your future. As a diversity and inclusion professional, you are in a favorable position to find opportunities if you seek them. In fact, you are likely already doing for others exactly what you should be doing for yourself. Your job requires you to develop partnerships with human resources personnel, enhance your employee development skills, and gain knowledge about helping others advance their careers. You can obtain some “Holistic HR Know-How” just by doing your job.

However, it may be necessary to ask yourself if you are too busy helping others to focus on your own career. As a busy professional, you should pause and listen to the advice you give others and leverage your skills, expertise, and awareness to advance your career objectives and goals. In these fast-paced times where there is little time to stop and look where you are going, it is easy to lose sight of your priorities and not think about the future.

While we work frantically to keep up, we often fail to see that we could work more effectively, that we are not enhancing our skills or learning more about our profession, or that, despite our frantic activity, we are losing our value to our company rather than enhancing it. Reflect on where you want to be and where you are going. Do you know the competencies you need? Do you have “Holistic HR Know-How?” Are you moving forward or falling behind?

Conversation Starters

How does your organization align its diversity strategy with its HR standards and requirements?

What is the current relationship between HR and diversity and inclusion?

How does the D&I strategy support the technical areas of HR, such as benefits and compensation, compliance, and ethics?

What D&I opportunities are available in three current HR initiatives?

Endnotes

1 Interview with James L. Norman, vice president, diversity and community involvement, Kraft Foods Group, May 2013.
12. Norman, James L., interview, vice president, diversity and community involvement, Kraft Foods Group
13. AACC Competencies for Community College Leaders, American Association of Community Colleges, approved by the AACC Board on August 13, 2013
20. Interview with Velois Bowers, vice president of diversity and inclusion, Christus Health, May 2013.