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# Diversity Management Instruments in Polish Organisations

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JOLANTA MAJ

Opole University of Technology, Opole, Poland  
e-mail: [j.maj@po.opole.pl](mailto:j.maj@po.opole.pl)

## Abstract

**Purpose:** Although diversity management as a concept and a term has been used since the 1980s, it is still a relatively seldom-used strategy in Polish organisations. As previous research shows, organisations define and implement diversity management in various ways, which consequently leads to the usage of different instruments. Therefore, the main goal of this paper is to present the different diversity management instruments used by Polish organisations. Special emphasis was put on the question whether the organisations have a dedicated budget for diversity management and whether they include diversity information in their reports. The aim of the paper was to present an overview of the instruments used by the organisations – leaders of diversity management in Poland.

**Design/methodology/approach:** For the purpose of this paper telephone-depth-interviews (TDIs) with representatives from companies implementing diversity management were conducted. The enterprises were chosen through purposive sampling. The organisations were firstly screened for implementing diversity management through an analysis of their web sites and reports. The organisations implementing diversity management and informing stakeholders about it through their web sites and reports were further included into the study. The respondents chosen for the TDIs were representatives of the organisations responsible for diversity management or indicated by the company itself as the most competent to give information about the organisation's diversity management related actions.

**Findings:** The conducted research has shown the variety of diversity management instruments used in the interviewed organisations is large. The instruments differ from simple ones like organising a diversity day and promoting the idea

of diversity and inclusion through simple channels to complex systems of monitoring and assessing the implementation of diversity management. Furthermore, all organisations declare that they include diversity in their reports. Additionally, almost all of them admit that they do not have a separate budget for diversity management actions and initiatives.

**Research and practical limitations/implications:** For the purpose of this paper a qualitative research approach was chosen. Therefore, the presented results are not representative, but, due to the fact that only a few organisations in Poland implement diversity management, the entities interviewed for the purpose of this paper can be treated as flagships of this strategy in Poland and as a kind of good practices.

**Originality/value:** The paper presents an overview of diversity management instruments used by Polish organisations with special emphasis put on budgeting and reporting. It defines diversity budgeting in terms of assessing every action from the perspective of its consequences towards all diversity dimensions represented in the company, while taking into account the human and financial resources.

**Paper type:** Research paper.

**Keywords:** diversity management, diversity charter, diversity budgeting, diversity reporting, diversity map, diversity management assessment.

## 1. Introduction

In comparison to other countries, i.e. the US, from where diversity management originates, and where it is strongly embedded in socio-economic and managerial discourse (McDonald, 2010), only a few Polish organisations implement diversity management (Gryzko, 2009). Diversity management is being perceived as an answer to many challenges organisations are facing in the globalising economy like inter alia cultural differences as a result of internationalisation (Karaszewski, 2004), the pursuit of new way of achieving competitive advantage witought using advanced technology (Bębenek, 2016) or simply population ageing (Maj, 2015). Some organisations percive diversity management simillary as for example corporate social responsibility, as a marketing strategy (Drewniak, 2013) or simply implement it as a result of following trends, a fashion or being politically correct (Skrzypczyńska, 2014).

As previous research shows (Maj, 2017b), organisations define and implement diversity management in various ways, which consequently leads to the usage of different instruments. Therefore, the main goal of

this paper is to present the different diversity management instruments used by Polish organisations. Special emphasis was put on the question whether the organisations have a dedicated budget for diversity management and whether they include diversity information in their reports. The aim of the paper is to present an overview of the instruments used by the organisations – leaders of diversity management in Poland.

The contemporary literature of the subject has often addressed topics of methods, tools and instruments of management (Siemonek and Siemionek-Ruskań, 2015; Wąchol, 2010). Jagoda (1999), while analysing the essence of concepts, methods and techniques of management, distinguished two layers: the ideological and the utilitarian layer. The ideological layer is, among others a response to the challenges of the environment, changing under the influence of socio-demographic processes or the emergence of new management paradigms. The ideological layer is reduced to the creation of new systems of values, objectives and mechanisms of functioning of enterprises. The utilitarian level consists of tools of different complexity, which are aimed at implementing an idea and connected values into the organisation. Therefore, what is differentiating the management instruments and tools are the particular ideological paradigms they aim to implement (Siemonek and Siemionek-Ruskań, 2015, pp. 98–99). Thus, the diversity management instruments used by Polish organisations should be instruments also used, in a different form, in other strategies and policies of the organisations.

## **2. Research background and methodology**

Diversity management is not a very popular approach among Polish organisations (Maj, 2012; Maj and Walkowiak, 2015). Therefore, in order to answer the main research question a qualitative research approach was chosen. Thus, the presented results are not representative, but, due to the fact that only a few organisations in Poland implement diversity management, the entities interviewed for the purpose of this paper can be treated as flagships of this strategy in Poland and the solutions used by these organisations may be used by other organisations as models.

For the purpose of this paper 20 telephone-depth-interviews (TDI) were conducted. The TDIs were conducted with the representatives of

companies, signatories of the Polish Diversity Charter in January and February 2017. The enterprises were chosen through purposive sampling. The idea behind choosing signatories of the Polish Diversity Charter was the intention of choosing organisations already implementing diversity management and therefore organisations consciously implementing this strategy, which should have an adopted understanding of this strategy. Because a previous study (Maj and Walkowiak, 2015) showed, that also among the signatories of the Diversity Charter only several organisations really implement diversity management, all signatory organisations of the Diversity Charter were firstly screened for implementing diversity management through an analysis of their web sites and reports. The organisations implementing diversity management and informing stakeholders about it were further included into the study. Organisations including only short statements about diversity management as well as training organisations, treating diversity management more as a product rather than an internal strategy were excluded. The final group chosen for the interviews included 42 organisations. Over half of them declined the participation in the study mostly due to lack of time. The respondents chosen for the TDIs were representatives of the organisations responsible for diversity management or indicated by the company itself as the most competent to give information about the organisations' diversity management related actions. The organisations represented a range of industries including: services (4 organisations), banks (3 organisations), chemical industry (2 organisations) and 1 organisation from following sectors: energy, other finances, retail trade, IT, hotels, building materials, food industry, basic materials industry, telecommunication, transport and logistics and a developer. The respondents were given a set of questions and if necessary, the answers were deepened by further questions. The interviews were transcribed and analysed using the MAXQDA software. For the purpose of this paper, the chosen parts of the interviews were translated into English. As some of the respondents insisted on anonymity, the organisations and interviews were encoded using a numbering from 1 to 20.

### **3. Diversity management instruments**

This section, presenting the research results, has been organized in the following way: firstly an overview of possible diversity management

instruments has been presented. Secondly instruments used by the interviewed organisations have been described. Then the issue of diversity reporting has been examined and finally the topic of diversity budgeting has been elaborated.

Diversity management as a strategy influencing various fields of organisations functioning and being even perceived as a horizontal strategy (Maj, 2017b) enables the implementation of various instruments depending on the area of implementation but also on the diversity dimensions covered and the phase of organisational maturity. The range of possible instruments is therefore wide. The instruments may be used for a single but also for multiple diversity dimensions. A compact compilation of possible instruments and their possible corresponding diversity dimensions has been presented in Table 1.

**Table 1.** Diversity management instruments and the corresponding diversity dimensions

No.	Diversity management instruments	Diversity dimensions
1.	Flexible working hours	Age, gender, disability
2.	Part time contracts	Age, gender, disability
3.	Working from home	Gender, age, disability
4.	Job sharing for leadership roles	Gender, disability
5.	Diversity trainings	All dimensions
6.	Networks for female leadership roles	Gender
7.	Mentoring	All dimensions
8.	Personal coaching	All dimensions
9.	Company kindergarten	Gender
10.	Support for child care financing	Gender
11.	Company counsel	All dimensions
12.	Quota for female managers	Gender
13.	Targeted recruiting	All dimensions
14.	Systematic development for mature staff	Age
15.	Horizontal moves for mature staff	Age
16.	Targeted design of mixed teams	All dimensions
17.	Ergonomic design of working space	Age, disability
18.	Design of content for mature staff	Age
19.	Leisure/sportive activities	Age, disability

**Table 1.**  
continued

No.	Diversity management instruments	Diversity dimensions
20.	Personal health counselling	Age, disability
21.	Life phase oriented personnel development	Age
22.	Job rotation/mobility programs	Ethnic origin
23.	International experience requirement	Ethnic origin
24.	Global talent pools	Ethnic origin

Source: Own study based on Landwehr (2016).

The presented list is by far not comprehensive and presents only a rough overview over the most basic instruments. Among the most complex instruments covering more than one diversity dimensions diversity audit tools should be mentioned including e.g. the Canadian Diversity Audit Tool (Cukier and Smarz, 2012) or the ÖNORM S 2501 (Austrian Standards, 2008).

The interviewees named a range of instruments used in diversity managements in their companies. One of the most often mentioned instruments, inter alia by Organisations no. 4, 7, 9, 11 and 14 has been the Polish Diversity Charter. Although the Diversity Charter is rather a declaration, than an actual instrument, the signatories commit to undertake action to a diversity climate, to develop internal instruments to promote equal treatment and diversity, to implement dedicated policies, to develop anti-discrimination and anti-mobbing monitoring connected with educational schemes, to engage in dialogue with stakeholders, to prepare annual reports and to promote diversity management outside the organisation (Responsible Business Forum, 2013). Organisation no. 3 declared the implementation of an internal Diversity Charter: “We have our internal Diversity Charter, we have internal documents to which every employee can refer (...) This documents are public, they are uploaded on our web site and are communicated internally. We had this situation when an employee felt discriminated and he came to us with this document”.

Organisation no. 19 implemented a very developed system for diversity management including a Diversity Assessment Framework System and Equality Screening and Impact Assessment. The Equality Screening and Impact Assessment tool, as explained by the Respondent no. 19, allows for the assessment of the organisations’ actions in regards to the influence on diverse employees:

The Equality Screening and Impact Assessment (SIA) is such a tool that lets you [assess] if new projects, new policies, new products or even a single event, were designed in a way that is inclusive and it also allows to evaluate what impact it will have on different groups (...). This is a very valuable instrument, because it allows to create equal opportunities for participation for all groups and if not, it shows us, what we can do to increase the chances for participation.

The Diversity Assessment Framework System consists of an assessment of offices undertaken every two years. One of its elements is the SIA. However, it includes also other actions:

Within the assessment there are three levels, which include from 5 to 7 indicators, starting from simple ones like: access to the office or equality clauses in contracts or in recruitment to more complex ones like taking proactive equality actions, the evaluation of new policies, projects and event planning from the perspective of how this policy, project, event can better implement equal policies, help raise awareness as regards to equality issues.

Organisation no. 14 implemented a diversity and inclusion map as a tool for monitoring the implementation of diversity management:

I have such a diversity and inclusion map of all processes and we can check what we already have and what we do not have. It also happens, that what we already had needs to be done again, redesigned because we forgot about something or it just needs improvement, better communication, better actions. This helps us to monitor on a regular basis how this strategy and policy have been implemented throughout the organisation.

Another interesting instrument used by the organisations is the Diversity Index, an instrument developed by Confederation Lewiatan in partnership with the Agency of Innovation and Development, which was aimed to help to analyse and monitor diversity management in organisations (Confederation Lewiatan, 2013). However, similarly as with the Diversity Charter, also some organisations developed their internal Diversity Index. As Respondent no. 15 described:

One of the elements of our management is that every six months we look at our diversity indicators, we show and discuss with the board and

we monitor what is happening in the organisation in terms of gender, remuneration for particular groups of jobs, the recruitment of the candidates, education etc. There are a lot of indicators that show us whether diversity in our bank actually exists and whether we also care about equal rights of particular groups. When we talk about diversity we do not talk only about gender equality but also inter alia the seniority in the organisation. We try to balance everything out and we see in the indexes, whether women and men earn the same in the same positions and if for example, the differences in remuneration derive from seniority, age, education or gender. So, we study different indicators in terms of determining the current state and whether we should undertake some actions.

The implementation of such a Diversity Index is also an important instrument for diversity reporting.

Another instrument used inter alia by Organisation no. 7 are diversity climate assessments, which have been conducted in cooperation with the UMCS University in Lublin. This organisation also highlighted the importance of networking and cooperation with external experts as well as participation in diversity events:

Over the last few years, a lot of such forums have been created. Recently, I have been participating in the Diversity Hub, this organisation in Cracow, which also deals with these themes of diversity, and the Ministry of Family, Labour and Social Policy somewhere invites us to diversity meetings. We have participated in the Diversity in Business project, involving equality between women and men in the workplace in various fields, and this collaboration with the ministry staff has expanded. An additional partner, quite significant one is the Confederation of Employers Lewiatan, where in recent years diversity meetings have been organised and we have focused on a variety of topics (...). Also there is the Polish Association of Human Resources Management, which is working in different areas but sometimes this diversity issue is also of importance to them.

Among other tools used by the interviewed organisations also more common instruments were mentioned, like:

- good practices – learning from diversity management leaders like the US or the UK as well as sharing own experience (Organisation no. 16);
- recruitment strategies – including inter alia extra points for minorities in the recruitment process (Organisation no. 5), the requirement to have at least one women on the short list for



- hiring or choosing a women, when two candidates are equally competent (Organisation no. 7) or simply using diversity promoting visualisations in job offers (Organisation no. 14);
- diversity trainings and e-learning – Organisation no. 18;
  - diversity day, diversity week, Day of Open Doors for Women – these instruments are aimed at raising awareness, knowledge exchange platforms, integration possibilities but also internal marketing tools;
  - mentoring and inter-mentoring programs – which are aimed at promoting the cooperation but also knowledge exchange between different generations;
  - newsletters, corporate blogs, intranet or flyers for foreigners – those communication tools are used to promote the organisation diversity management strategy among employees and show the support of the Board to the diversity actions, which is especially important in terms of legitimization of the strategy (cf. Karaszewski and Lis, 2013) (Organisations no. 16, 15 and 4);
  - codes of conduct and anti-discrimination policy – Organisation no. 9;
  - work-life balance strategies – which, in the opinion of Organisation no. 18 should enable diverse groups the functioning in the organisation;
  - performance review – the inclusion of diversity management in the performance review of managerial staff (Organisation no. 18).

As the conducted interviews have shown the variety of diversity management instruments used in the interviewed organisations is large. The instruments differ from simple ones like organising a diversity day and promoting the idea of diversity and inclusion through simple channels to complex systems of monitoring and assessing the implementation of diversity management. The decision to use a particular instrument or a set of instruments is very often connected to the place in the structure and organisation, where diversity management has been implemented.

#### **4. Diversity management reporting**

The next research question was the issue of diversity reporting. The importance of this topic results from inter alia EU legislation, especially

the *Directive 2014/95/EU of 22 October 2014 amending Directive 2013/34/EU as regards disclosure of non-financial and diversity information by certain large undertakings and groups* (European Parliament, Council of the European Union, 2014), a systematically growing tendency to legally regulate the issues of diversity management, corporate governance or reporting of nonfinancial data (Adams, 2016), as well as international trends in disclosure of non-financial and diversity information. As previous research shows, only a few organisations disclose non-financial and diversity information as described in the directive (Maj, 2016a; Maj, 2016b; Maj, 2017a). However most of them have a statement explaining the lack of a diversity policy by the fact, that the membership in their boards is competency-based. However the analysed organisations were not chosen as flagships of implementing diversity management, as it was the case with the sample selected for the purpose of this paper. All of the organisations interviewed within this research declared to report on diversity issues to a greater or lesser extent. Among the diversity information included in the reports the organisations mentioned:

- workforce structure due to gender and age (Organisations no. 2, 3, 7, 9 and 18);
- gender composition of the board (Organisations no. 3 and 9);
- gender pay ratio (Organisation no. 15);
- hours of training per employee by gender (Organisation no. 12);
- diversity as a variable in employee satisfaction survey (Organisation no. 10).

Some of the organisations mentioned that they prepare their annual reports according to the Global Reporting Initiative (GRI) guidelines which include information like the workforce structure due to gender and age, gender and age composition of the board, hours of training per employee due to gender and age, gender pay ratio but also a number of discrimination cases in the organisation (Global Reporting Initiative, 2015). What the organisations, signatories of the Polish Diversity Charter failed to mention was the fact, that as signatories they are obliged to report very detailed diversity information. Therefore, the question arises on whether they in fact report the data. However, according to the Responsible Business Forum website, if an organisation fails to report the information for two years it will be removed from the list of signatories (Responsible Business Forum, nd). Respondent no. 9

stated, that apart from reporting according to GRI the organisation also implemented an internal reporting system:

We have a very advanced reporting system and prepare annual GRI Sustainability Reports (...) and additionally we have an internal reporting system, which is called SAM. One of the most important indicators is the percentage of women in managerial positions and the cross-section across all positions; we report the age of employees in particular departments and areas. This is being thoroughly verified and reported every half a year. In addition to the strict indicators, we have a level-based reporting system, ranging from 0 to 5, which includes diversity issue and we assess twice a year at what level we are.

Respondent no. 2 mentioned however some limits to diversity reporting in Poland: “Yes, diversity is an element of the annual reporting. Every year a report on age diversity, (dis)ability is being prepared. (...) We do not report about race and religion, we cannot gather such data, we do not engage in dialogue with employees about this”.

## **5. Diversity management budgeting**

The final issue analysed in this paper is the question of diversity budgeting, which, similarly to gender budgeting (Leicht-Scholten and Wolfram, 2010, p. 91) can be defined as the assessment of every action from the perspective of its consequences towards all diversity dimensions represented in the company, while taking into account the human and financial resources. Therefore, diversity budgeting is not possible without the collection of data taking into account diversity. Within the framework of the conducted research the issue of collecting diversity data was included in the question about diversity reporting, where all organisations declared a more or less thorough diversity reporting. Therefore, they are able to establish to a certain level the consequences of undertaken actions on diversity. The next issue is the question of human and financial resources. In most cases diversity management is implemented as a part of other strategies: corporate social responsibility or human resources management (Maj, 2017b), therefore the human resources capacity may be assessed as limited. The final question is the one regarding financial resources. Within the conducted interviews the

respondents were asked how diversity management is being financed in their organisations. Most of them admitted, that diversity management does not have a separate budget. Diversity management actions are financed inter alia under the training and development budget (Organisation no. 18). The lack of a separate budget is also a derivative of the place of diversity management in the organisation. Furthermore such solutions may not necessary be accepted in the whole group. As respondent no. 16 explained:

Until now, there was not such a budget. It's not my place to point to the reasons, these are global issues and on the global level, in the mother company in France. But in those countries where diversity management has existed for many year and where are people, who deal exclusively with diversity management such budgets exist. In Poland, I am the person responsible for it, however this is not my only responsibility, this is an additional task, under other responsibilities.

In Organisation no. 19, which implements diversity management as a horizontal strategy, also the financing is divided into the particular projects:

From this approach assuming that this [diversity management] is not a separate strategy, but that it is something, that should be mainstreamed everywhere, results also the standpoint of the lack of a separate budget. Diversity trainings are financed from the training budget; other activities in particular projects are financed from the project budgets.

A mixed solution has been adopted by Organisation no. 8, where some of internal diversity management actions have their own cost unit while external actions are assigned to several departments and their budgets:

I account for my hourly work with specific codes, to sort all activities out. There is a budget when it comes to doing work in this [diversity management] area. On the other hand, when it comes to external actions, there is no need to create a separate budget, it is included in the cost units of individual teams. We have a budget for example for employer branding and there are diversity activities under this budget. Also in marketing (...) initiatives like *Business Women of the Year* are included.

The statement of Respondent no. 12 may suggest, that until diversity management is implemented in organisations under the umbrella of other concepts/projects and in other departments, the financial as well the human resources will stay limited.

## 6. Conclusions

The conducted research gave insight into the practical implementation of diversity management in Polish organisations. It should once again be noted, that due to the qualitative nature of the conducted research as well as the purposive sampling, the results and analysis presented above cannot be treated as representative but more as an exploration of the topic. Therefore, a further, quantitative analysis on a representative sample of organisations would be beneficial for a wider understanding of the issue, which could be difficult because of the limited prevalence of this strategy among Polish organisations. However, a quantitative analysis could enable to determine how popular and widespread are the presented instruments among Polish organisations. Furthermore, a more detailed analysis of some of the instruments would also be beneficial. Especially case studies of the complex monitoring and assessment instruments like the Diversity Assessment Framework System and Equality Screening and Impact Assessment or the Diversity and Inclusion Map would be very interesting. A quantitative research should also include an analysis of the effectiveness of diversity management instruments. As Landwehr (2016) shows, organisations not always implement instruments perceived as the most efficient like i.e. gender quotas. Furthermore, it would be beneficial to determine whether the presented instruments are oriented towards one or more diversity dimensions.

The second part of the research, concerning diversity reporting showed, that organisations in general collect some data on diversity. It should however be noted, that this is to some extent a legal obligation of the organisation. However, open remains the question of how the Diversity Charter signatories fulfil their obligation to report on their diversity management actions. Considering the growing tendencies to regulate the issue of non-financial and diversity information reporting, this topic will be of interest not only to researchers but also to the organisations themselves.

Finally the analysis of diversity budgeting showed that all of these issues described above are connected. The position of diversity management in organisational structures influences human resources for diversity budgeting. The size and also financial (in)dependence of diversity management define financial resources. Finally, without collecting and assessing diversity data or data related to diversity management initiatives, diversity budgeting is not possible. Furthermore, the lack of a separate budget may suggest, that diversity management still is not perceived as an equal strategy to inter alia corporate social responsibility.

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