Using a DEI Lens as We Develop Recommendations for How to "Come Back to Work"

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Related webinar recordings:

Using an Inclusion Lens to Analyze & Revise
https://drkathyobear.com/inclusion-lens-in-crisis-management-webinar/

Use a Race Lens in Planning and Revising Policies & Practices, 25 mins:
https://youtu.be/p7j4_3vfjk0

Creating Inclusive Teams and Classrooms https://drkathyobear.com/inclusive-teams-webinar-confirm/

Recognizing Microaggressions
https://drkathyobear.com/aggressionwebinar-2/

Feelings and Emotions

Major source: Raj Gill, Lucy Leu, Judi Morin, **NVC Toolkit**, 2009

Check-off/Circle any that you or others felt/feel. Add any others to the list.

Aggravated	Distressed	Jealous
Agitated	Distrustful	Jubilant
Alarmed	Drained	Lonely
Alienated	Dumbfounded	Longing
Ambivalent	Eager	Mean
Amused	Edgy	Mortified
Angry	Embarrassed	Nervous
Anguish	Empowered	Numb
Annoyed	Empathetic	Outraged
Anxious	Enraged	Overwhelmed
Appreciative	Envious	Panic
Apprehensive	Exasperated	Paralyzed
Appalled	Excited	Peaceful
Awe	Exhausted	Perplexed
Ashamed	Exhilarated	Powerless
Bitter	Fascinated	Preoccupied
Bored	Fearful	Puzzled
Burned out	Forlorn	Raging
Calm	Frightened	Regretful
Carefree	Furious	Relieved
Confident	Grateful	Remorseful
Confused	Gratified	Repulsed
Crushed	Grief	Resentful
Defeated	Guilty	Sad
Deflated	Hateful	Surprised
Dejected	Heartbroken	Sympathetic
Depleted	Hesitant	Tender
Depressed	Hopeless	Tense
Despair	Hurt	Terrified
Determined	Impatient	Touched
Disappointed	Incensed	Unsettled
Discouraged	Indifferent	Useless
Disgusted	Indignant	Vulnerable
Disheartened	Infuriated	Wary
Disillusioned	Insecure	Weary
Dissatisfied	Inspired	Worried
Distracted	Irritated	

Engagement Guidelines

1. OPEN AND HONEST COMMUNICATION; ANTICIPATE THE IMPACT OF YOUR COMMENT
2. PARTICIPATE FULLY (COMFORT ZONE +1); EXPECT DISCOMFORT IF LEARNING
3. SPEAK FROM PERSONAL EXPERIENCE
4. LISTEN RESPECTFULLY; LISTEN TO LEARN
5. SEEK TO UNDERSTAND; EXPECT DISAGREEMENT & LISTEN HARDER
6. SHARE AIR-TIME: MOVE IN, MOVE OUT
7. BE FULLY PRESENT
8. BE OPEN TO NEW PERSPECTIVES
9. EXPLORE IMPACT; ACKNOWLEDGE INTENT
10. EXPECT PEOPLE TO LEARN AND GROW; DON'T FREEZE-FRAME OTHERS
11. TAKE RISKS; LEAN INTO DISCOMFORT; BE BRAVE; ENGAGE
12. RESPECT AND MAINTAIN CONFIDENTIALITY
13. NOTICE/DESCRIBE WHAT YOU SEE HAPPENING IN THE GROUP, IN YOU
14. RECOGNIZE YOUR TRIGGERS; SHARE IF YOU FEEL TRIGGERED
15. TRUST THAT DIALOGUE WILL TAKE US TO DEEPER LEVELS OF UNDERSTANDING AND ACCEPTANCE
16. ENGAGE & EMBRACE THIS OPPORTUNITY; WE WON'T BE FINISHED

Meeting Guidelines ~ Your Intentions

*To create a meeting environment where all members feel heard, involved, supported, and respected
*To create a productive and engaging meeting environment for the open and respectful exchange of ideas, perspectives, and opinions
*To promote respectful dialogue, fair discussion of issues, and mutually respectful conversations

- Engage in respectful discourse
- Create a positive, collegial atmosphere
- Demonstrate mutual respect for the comments and views of all
- Consider and explore new ideas and perspectives
- Express opposing ideas in a respectful manner
- Consider the potential impact of your comments and actions
- Accept responsibility for the overall welfare of the entire group
- Engage in respectful disagreement: Argue passionately about issues without personalizing it to the person
- Respectfully address unproductive and exclusionary behaviors from other group members

Group Identities: Differences That Make a Difference

1. Age

2. Care Giver Status

3. Customer-facing/Back office

4. Disability Identity

5. Educational Background

6. Ethnicity/Culture

7. Family Make-up (of origin, current members)

8. Food Availability/Security

9. Gender Identity (cisgender, transgender, gender nonconforming)

10. Gender Presentation

11. Geographic Region

12. Health Status

13. Housing Status: Internet status, A/C

14. Immigration Status; Refugee Status

15. Language Proficiency/Use of English/ "Accents"

16. Mental Health Status

17. Nationality/Citizenship

18. Political Affiliation

19. Position & Level in the Organizational Hierarchy

20. Race/Racialized Identity, Settler/Indigenous Identity, Skin Color

21. Relationship/Marital/Parental Status

22. Religion/Spirituality/Ways of Knowing

23. Revenue producing/not revenue producing

24. Sex (male, female, intersex)

25. Sexual Orientation/Sexuality

26. Size/Appearance/Athleticism

27. Socio-Economic Class (of origin; current)

28. Transportation Status

29. Vaccination Status

30. Veteran/Military Status

31. Work Style (extroverts or introverts; results or process oriented)

32. Years of Experience (in the field, organization)

Re-Imagining with a DEI Lens:
Questions to Consider as You Discuss Possible Recommendations for Guidance and Guidelines

A. When discussing an **existing practice, "little p" policy, or expectation/norm**, etc., use the Group Identity Cards as the group explores these questions:

1. What were <u>possible productive intentions</u> when this practice, policy, expectation/norm, etc., was created?
2. By group membership, who <u>probably</u> had their needs met <u>back then</u>? <u>Might not</u> have?
3. <u>Today</u>, by group membership, who <u>probably</u> gets their needs met?
4. What groups <u>may not</u> have their needs met?
5. What groups may face extra barriers, hurdles, and obstacles?
6. What groups might/will experience <u>unintended negative differential impact</u> from this policy, practice, or expectation/norm? This decision?
7. What <u>shifts/changes</u> could meet the needs of more people across group identities? What else is possible?
8. What <u>more do we need to know</u>? Questions we still have?
9. <u>Whose involvement and input</u> could help us in this conversation?
10. What questions, issues or ideas <u>seem out of scope</u>, yet we need to pass along for someone to consider?

When exploring the usefulness of a **new idea or approach to a possible practice, "little p" policy, or expectation/norm**, etc., use the Group Identity Cards as the group explores these questions:

1. How will this idea advance our DEI and other organizational goals? The productive intentions?
2. By group membership, who <u>probably</u> will have their needs met?
3. What groups <u>may not</u> have their needs met?
4. What groups <u>may face extra</u> barriers, hurdles, and obstacles?
5. What groups might/will experience <u>unintended negative differential impact</u> from this policy, practice, or expectation/norm? This decision?
6. <u>What else is possible</u>? What variation would meet the needs of more people across group identities?
7. What <u>more do we need to know</u>? Questions we still have?
8. <u>Whose involvement and input</u> could help us in this conversation?
9. What other questions, issues or ideas <u>seem out of scope</u>, yet we need to pass along for someone to consider?

Panning/Observing Group Dynamics with an Inclusion Lens

Use the following prompts as you use an Inclusion Lens to observe and observe/pan group dynamics. Identify "just the facts" and the actual details of the situation without any assumptions, interpretations, judgments, or conclusions.

1. What differences are present in the group? Which group memberships? How many from various groups?
2. Who is talking?
3. Who is quiet? Doesn't speak as often as others?
4. How are people reacting nonverbally?
5. Who initiates the topics?
6. What ideas are brought up? By whom?
7. Whose ideas get considered? Whose ideas don't get much discussion?
8. Whose ideas are discounted? Or "plop" without comment?
9. How do decisions get made?
10. Who interrupts others? Who gets interrupted? Who is never interrupted?
11. How and when do the tone and energy of the conversation shift and change?
12. How much airtime do people take?
13. Who has changed their way of engaging recently?
14. Who do people look at when they are talking?
15. Who has eye contact with whom while others are talking?
16. Who engages in side conversations?
17. Who brings up issues of respect and inclusion?
18. How do people respond when different issues of inclusion are raised?
19. What issues of inclusion and respect are not being brought up or discussed?
20. As you notice interpersonal dynamics that are not inclusive, who intervenes to shift the dynamics? Who doesn't?
21. As you observe exclusionary comments and actions, wonder: Is this an isolated incident or a possible common pattern of experience?

Adapted from materials developed by Elsie Y. Cross Associates, Inc. 1994 Delyte Frost, et al. "Tracking™"

Unproductive Meeting Behaviors

a. In the 1st column, check-off any unproductive behaviors which you have observed in meetings.
b. Then in the 3rd column, check-off any of these behaviors that you have ever done.
c. Choose 5+ items, and in the 4th column, note the probable impact of each type of unproductive behavior.

Others do this	Unproductive meeting behaviors, when someone:	I've done this	Probable impact
	1. Makes inappropriate comments or "jokes"		
	2. Belittles input or comments of others		
	3. Minimizes or rationalizes away the frustrations and comments of group members		
	4. Interrupts or talks over others		
	5. Engages in side conversations		
	6. Dominates the conversation		
	7. Makes snide or sarcastic comments		
	8. Only interacts and makes eye contact with people like them; people they like		
	9. Gives unsolicited "advice;" tells someone how they should have felt or responded differently		
	10. Dismisses or ignores the input of others		
	11. Disregards feedback from group members		
	12. Laughs at or makes fun of other group members		
	13. Treats peers with disrespect		
	14. Gives someone the "silent treatment" or "cold shoulder"		
	15. Uses a negative, judgmental tone		
	16. Uses an overly aggressive or forceful style		
	17. Refuses to participate in the discussion or the activity		
	18. Is silent, shut down or withdrawn		
	19. Challenges the validity of the information being presented to serve a personal agenda		
	20. Questions the usefulness of an activity or a discussion to serve a personal agenda		
	21. Gives excuses or PLEs (Perfectly Logical Explanations) for disrespectful comments and behaviors		
	22. Raises their voice to try to silence others		
	23. Emphasizes "good intent" and does not also listen to the impact of actions		

	24. Makes negative stereotypic comments about others or self		
	25. Tells others they are "too sensitive"		
	26. Repeats or re-phrases what members with lower status have just said		
	27. "Hears" and acknowledges ideas only if they come from members with higher group status		
	28. Does not engage or "hear" comments from members with lower group status		
	29. Judges or dismisses input from members of lower status groups if they express anger or frustration		
	30. Only asks members of lower status groups to repeat what they have just said		
	31. When confronted, frames the situation as an "attack"		
	32. Goes to lunch or socializes only with certain group members		
	33. Acknowledges and praises only certain group members		
	34. Rolls their eyes or makes other negative nonverbal behaviors when others are talking		
	35. Chastises others publicly		
	34. Critiques and questions only the ideas and materials presented by lower status members		
	35. Bullies other group members		
	36. Has a patronizing or condescending manner		
	37. Derails the planned format and agenda to serve a personal agenda		
	38. Criticizes the personal character of group members		
	39. Takes credit for the work or ideas of others		
	40.		

Common Unproductive Reactions

Fight Responses

- Aggressively argues and debates
- Raises their voice, yells
- Tries to silence others
- Tries to compete, win at any cost
- Interrupts
- Self-righteous, arrogant, or condescending behaviors
- Controlling, manipulative behaviors
- Intimidating, threatening behaviors
- Forces change
- Aggressively attacks and berates

- Dismisses or minimizes the comments of others
- Explodes and directs their feelings onto others
- Sarcastic or off-handed remarks
- Belittling comments
- Intentionally tries to embarrass others
- Criticizes or accuses with the intent to humiliate and shame
- Bullies others into submission
- Turns their words against them

Flight responses

- Gets defensive
- Becomes overly guarded
- Withdraws
- Ignores or avoids issues
- Tries to smooth over conflict
- Placating to keep things under control
- Minimizes, downplays the issues or conflict

- Shuts down
- Disengages
- Uses humor and jokes to distract and smooth things over
- Quickly changes the subject
- Pretends to agree to avoid conflict
- Uses crying to distract and not engage

Freeze responses

- Blanks out, forget what wanted to say or do
- Zones out
- Feels frozen, like they can't move

- Doesn't respond or interrupt exclusionary comments and actions
- Overly anxious and scared

Flounder Responses

- Giving contradictory comments/examples
- Stream of consciousness, blabbering
- Off on tangents; way off topic

- Can't decide: maybe this or maybe that
- Out of your body, still talking

PAIRS: EFFECTIVE DIALOGUE SKILLS

P: PAN the environment and yourself; describe what you notice or engage others based on what you see **(Pay Attention Now)**

- I'm noticing I'm feeling...anyone else?
- I noticed how quiet everyone got; I'm wondering what is going on for folks?
- It seems some people were impacted by that statement, am I right?
- I'm noticing you're speaking with a lot of energy and emotion…
- I'm noticing that people get interrupted as they try to share...
- You seemed to have a reaction to what I just said...

A: ASK about the specifics behind the person's comment or behavior

- Could you say more about that…Tell me more...
- Can you give us an example of what you're saying…?
- Help me understand what you meant by that?
- What were you hoping to communicate with that comment?
- Can you help me understand what your intent was when you said/did...?
- Can you give me some background on this situation...?
- How were you impacted when...? What were you feeling when...?

I: INTERRUPT the dynamics

- Let's slow down the conversation and talk about what just happened…
- I'm going to interrupt and try a different approach to this conversation…
- We are not engaging according to our group norms.
- Let's take a breath…

R: RELATE to the person or their comment/behavior

- I relate to what you're saying, I…I have felt the same way...
- I remember a time when I... I did the exact same thing...
- How do others relate to that comment?
- What you're saying seems to relate to what so-and-so just said…

S: SHARE about yourself ~ self-disclose with a story or example; your feelings in the moment; the impact of a comment or behavior, etc.

- When I hear you say that I think/feel...?
- Just last week I... I remember when I...
- I was socialized to believe...
- I'm beginning to feel _____...
- My heart aches as you tell that story...
- I notice I'm feeling a little triggered...

Engaging Skills	Examples/Descriptions
Ask the person for more information ~ seek to understand	• Can you tell me more...? • Can you give me an example...? • Can you give me some background on this situation...? • What do you mean when you say…? • Help me understand what you disagree with…find frustrating… • Help me understand how you came to that conclusion? • What were you feeling when…? • What's your perspective? • What led you to that conclusion?
Paraphrase the person's comments	• So, you're saying that... • So, you feel that... • So, you think that… • Are you saying that…? • So from your perspective…
Explore their INTENT	• Help me understand your intent when you… • What had you wanted to communicate with your comment? • What was your intended outcome? • What is underneath your comment/question?
TRACK/PAN the person's body language, tone, and comments	• I notice you had a reaction to what I just said... • I don't believe she was finished with her comment… • I notice you just got very quiet...looked away...shook your head… • I'm noticing your tone of voice… • I'm noticing your body language…
Explore the IMPACT on them	• It seems my behavior had an impact on you... • How did that impact you? • What were you feeling when…
Acknowledge and validate their points as much as possible	• I hear that you feel... • I can see that from your perspective you think… • I'd probably feel _____, too...
Explore possible solutions	• What do you think we can do? • What do you see as the next steps? • One thought could be to…what do you think? • Might it be possible to…
State your desired outcome	• This is what I suggest we do… • I want to…I need…
Summarize the dialogue	• Summarize the dialogue without stating opinions or judging the dialogue. • So we've discussed...we agreed to…

Analyze and revise all policies, practices, products, programs, and services with an Equity & Inclusion Lens

1. **Start by gathering a group of people to create a long list** of current policies, programs, services, and practices
   - That <u>MIGHT</u> be improved by analyzing & revising with an Equity & Inclusion Lens to meet the needs of the full breadth of those you serve
   - Continue to share the list with an expanding group of people to collect additional ideas

2. **Choose one policy, protocol, practice or service to analyze**

3. **Get clarity on the PROCESS for policy revision and WHO can make this decision and WHAT information may help them decide**

4. **Gather a demographically diverse group with some stake in the process and knowledge about it**

5. **Use this question to get an initial analysis from group members:**
   - How Equitable & Inclusive is this Policy, Program, Protocol, Practice or Service?

   <div align="center">

   Scale 0-10:
   0 = not at all   --------------   10 = completely
   </div>

   - <u>Then ask them to reflect and share</u>:
     - What group identity lenses were you using as you answered?
     - How might staff and clients from various other identity groups possibly answer this question?

6. **Use the Group Identity Cards to identify:**
   a. What were possible productive intentions when this practice, policy, etc., was created?
   b. By group membership, who probably had their needs met <u>back then</u>?
   c. <u>Today</u>, by group membership, who probably gets their needs met?
   d. What groups may not have their needs met?
   e. What groups may face extra barriers, hurdles, and obstacles?
   f. What groups might be <u>unintentionally, negatively impacted</u> by this policy, practice, or service? This decision?

7. **Consider each of the Group Identity Cards as the group explores:**
   - **How Equitable & Inclusive is this Policy, Program, Protocol, Practice or Service ~**

   <div align="center">

   Scale 0-10:
   0 = not at all   --------------   10 = completely
   </div>

- **Make different columns of group identities to reflect the group's current perspectives, by group membership:**
  - Definitely get their needs met
  - Some needs are probably met
  - May face many barriers and obstacles
  - May experience negative impact

8. **Notice which groups most individuals do not know enough about to place in a column**

9. **Gather more data and new perspectives** from those who have knowledge, experience, and competence in these areas of diversity

10. **Research practices and policies** at peer and aspiring organizations

11. **Ask the Analyzing Group to identify a wide range of possible revisions**

12. **Take these data and share them more broadly to gather additional insights of possible gaps and negative impact as well as recommended revisions**
    a. Meet with other constituency groups
    b. Invite people who see possibilities, are innovative and systemic thinkers

13. **Develop a proposal of recommendations for the person(s) who has the power to make revisions**

To reflect on recent decision-making processes, discuss:
1. Who was **at the table** when we made this decision?

2. By group membership, who was **not at the table**? Whose voices weren't represented?

3. **Whose input** did we use? **What additional input** could have helped create a better decision?

4. How did we **develop buy-in** from those who are impacted by or implemented the decision? How else could we have developed greater buy-in?

Developed by Dr. Kathy Obear, *Center for Transformation & Change* **www.drkathyobear.com**