



Creating Inclusive Organizations, Part 1

Virtual Institute

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For complimentary copies of my books and other resources:

Turn the Tide: Rise Above Toxic, Difficult Situations in the Workplace:

www.drkathyobear.com/book-pdf | www.drkathyobear.com/book-worksheets |
www.drkathyobear.com/book-gift (animated video and outline for a Lunch & Learn)

...But I'm NOT Racist! Tools for Well-Meaning Whites

www.drkathyobear.com/imnotracist | www.drkathyobear.com/facebook (supplemental
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***In It For The Long Haul: Overcoming Burnout and Passion Fatigue as Social Justice
Change Agents***

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Purpose of this Virtual Institute:

Deepen capacity of all members of the organization to use the Multicultural Organizational Development Model (MCOB) to engage in authentic dialogue and analyze the current climate, culture and organizational dynamics through an Inclusion Lens.

Adams, Bell and Griffin (2007) define social justice as both a process and a goal. "The goal of social justice education is full and equal participation of all groups in a society that is mutually shaped to meet their needs. Social justice includes a vision of society that is equitable and all members are physically and psychologically safe and secure." *Adams, M., Bell, L. A., & Griffin, P. (Eds.). (2007). Teaching for diversity and social justice: A sourcebook (2nd ed.). New York, NY: Routledge.

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Learning Guidelines/Working Agreements

1. ENGAGE IN OPEN AND HONEST DIALOGUE
2. PARTICIPATE FULLY (@ COMFORT LEVEL +1)
3. SPEAK FROM PERSONAL EXPERIENCE
4. LISTEN RESPECTFULLY; SEEK TO UNDERSTAND; LISTEN HARDER WHEN YOU INITIALLY DISAGREE
5. MOVE IN, MOVE OUT; ENCOURAGE OTHERS TO PARTICIPATE
6. BE FULLY PRESENT
7. BE OPEN TO NEW AND DIFFERENT PERSPECTIVES
8. EXPLORE THE IMPACT OF COMMENTS AND BEHAVIORS; ACKNOWLEDGE INTENT
9. TAKE RISKS: LEAN INTO DISCOMFORT; BE BRAVE
10. RESPECT AND MAINTAIN CONFIDENTIALITY
11. NOTICE AND SHARE WHAT'S HAPPENING IN THE GROUP, IN YOU
12. RECOGNIZE YOUR TRIGGERS; SHARE IF YOU FEEL TRIGGERED
13. TRUST THAT THROUGH DIALOGUE WE WILL REACH DEEPER LEVELS OF UNDERSTANDING
14. ENGAGE THIS OPPORTUNITY!

Meeting & Classroom Guidelines ~ Your Intentions & Guidelines

*To create environments where everyone feels heard, involved, supported, and respected

*To create productive and engaging environments 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
- Speak and act in ways that do not disrupt or interfere with the learning or work of others.
- Explore controversial issues through open dialogue and respectful deliberation.
- 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: Disagree with a person's ideas without attacking their humanity
- Respectfully address unproductive and exclusionary behaviors from other students

Increase your awareness of what is happening inside of you and around you by using the skill:

PANNING

Just as a movie camera “pans” the environment to see the whole picture, we need to continuously **PAN** all around us and inside of us as we increase our ability to notice the patterns of treatment and experiences of members of both privileged and marginalized groups.

Some guidelines for using the skill of PANNING:

PAN:

PAY

ATTENTION

Now

- Intentionally observe and notice behaviors, comments, feelings, patterns of treatment...
- Wonder: Is this an isolated incident or a possible pattern of experience?

*****AVOID falling into the trap of making a *SNAP JUDGMENT* ~ creating a “story” about what you see.**

- **PAN** the specific details and facts of what you see, feel, hear...
- Describe what you **PAN** without any assumptions, interpretations, conclusions, or prejudgments
- Notice the group memberships of people involved as you **PAN**, and describe the group memberships *if this information is useful to the discussion...*

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

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? and 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 air-time 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?
- 22.
- 23.

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

Self-Assessment: Critical Skills for Inclusion Practitioners

Developed by Kathy Obear, Ed. D., 2014

Directions: Read each of the following and rate how often you currently practice these skills:

1= Never 2 = Rarely 3= Occasionally 4= Often 5= Always

A. Use an Inclusion Lens to both observe and respond effectively to group dynamics.

- _____ 1. I intentionally notice/track the various privileged and marginalized group memberships of others during meetings, conversations, etc.
- _____ 2. I intentionally use an Inclusion Lens to notice/track how people interact with each other, including: whose ideas get attended; whose ideas are ignored/dismissed; who interrupts; who gets interrupted; who is given leadership; how much air time people use; how people react verbally and nonverbally as others share; how decisions get made, who has eye contact with whom; to whom do people direct their comments, etc.
- _____ 3. I describe the details or “facts” of what I observe/pan without judgment, assumption, interpretation or conclusions.
- _____ 4. I notice what issues of diversity are discussed effectively and which ones are ignored or not addressed productively.
- _____ 5. I introduce topics or issues related to diversity, equity, and inclusion that others do not seem to raise or bring up.
- _____ 6. I respond effectively when I notice stereotypic and/or exclusionary comments and behaviors in meetings.
- _____ 7. I am aware of how people may experience and interpret comments and nonverbal behaviors differently based upon their cultural perspective and their experiences in their multiple privileged and marginalized groups.

B. Engage others effectively

- _____ 8. I encourage group members to participate and engage them in the process.
- _____ 9. I use effective listening and communication techniques, including clarifying, paraphrasing, open-ended questions, etc.
- _____ 10. I use “Connecting Language” that bridges one person’s comments to another’s.

- _____ 11. I demonstrate empathy effectively.
- _____ 12. I am able to “relate in” and “see myself” in others to find compassion and make a connection with them, rather than judging them or distancing from them.
- _____ 13. I use silence effectively.
- _____ 14. I effectively use my tone of voice and nonverbal behavior to engage others.
- _____ 15. I use humor appropriately and effectively.
- _____ 16. I use self-disclosure and share feelings, thoughts, opinions, and personal experiences effectively.
- _____ 17. I acknowledge and appreciate people’s participation.
- _____ 18. I summarize discussions and make transitions effectively.
- _____ 19. I effectively move discussions along and keep the group focused and “on track.”
- _____ 20. I effectively include all members in the discussion.
- _____ 21. If I believe a member(s) has been overlooked or excluded, I intervene to either indirectly bring them into the conversation or more directly note the group dynamic.
- _____ 22. I effectively find some relevant point in participant comments, even those that seem way off the topic.
- _____ 23. If I believe someone is on a tangent, I can effectively acknowledge their point and redirect the conversation back to the group’s topic.
- _____ 24. I effectively help participants recognize assumptions and help them differentiate between observable facts and interpretations.
- _____ 25. I minimize how much I use the “telling” style and maximize how often I pose questions or dilemmas to facilitate dialogue among group members.
- _____ 26. I easily “go with the flow” and am flexible with the agenda as I adjust to the needs of the group in the moment.
- _____ 27. I can “meet people where they are” and not demand or expect them to be farther along in their understanding or skill development.

- _____ 28. I effectively name and discuss group dynamics among members in the moment and use them as “teachable moments” to facilitate deeper understanding and learning.
- _____ 29. I can “let go of the outcome” and “trust the process” knowing learning takes place even when I do not recognize it happening in the moment.

C. Facilitating discussions with an Inclusion Lens

- _____ 30. I talk about the organization’s commitment to equity, inclusion, and social justice.
- _____ 31. I state that it is everyone’s responsibility to help create an organizational climate that is respectful and inclusive for all members.
- _____ 32. I effectively discuss the common daily indignities and microaggressions that people from marginalized groups experience in the organization.
- _____ 33. I effectively discuss specific behaviors and actions that help create inclusive organizational environments.
- _____ 34. I consistently demonstrate respect for all participants across privileged and marginalized group memberships.

D. Responding in “difficult dialogues” with an Inclusion Lens

- _____ 35. I effectively navigate discussions where group members are feeling and expressing deep emotions, including anger, sadness, fear, frustration, hopelessness, etc.
- _____ 36. I am able to be “in the moment” ~ fully present and focused on what is happening in the group and in myself during difficult dialogues.
- _____ 37. I effectively respond to participant behaviors I believe are distracting, including dominating, interrupting, side-tracking, side conversations, etc.
- _____ 38. I acknowledge comments which sound inappropriate or triggering.
- _____ 39. I engage people in dialogue when I experience one of their comments as inappropriate or triggering.
- _____ 40. I recognize that “resistance” and challenges from group members are often doorways to deeper understanding and learning for the group.
- _____ 41. I effectively navigate conflict and disagreement among group members.

- _____ 42. I respond effectively to challenges and engage “resistance” from group members without taking it personally or feeling deeply triggered.
- _____ 43. I can use triggering events as “teachable moments” for the group.

E. Use an Inclusion Lens to analyze current policies, practices, services, programs, and marketing/media

- _____ 44. I recognize what identity groups will most likely have their needs met given a specific policy, practice, program, or service.
- _____ 45. I recognize what identity groups might not have their needs met given a specific policy, practice, program, or service.
- _____ 46. I recognize possible unintended negative differential impact across group memberships given a specific policy, practice, program, or service.
- _____ 47. I track current utilization of programs and services within your area by group membership.
- _____ 48. I continually gather data about the impact, perceptions, and experiences of the programs, services, climate, etc., by group membership.
- _____ 49. I use these data to continually evaluate and revise current programs, services, practices, procedures, facilities, etc., to ensure inclusion for the full breadth of people who work in and are served by our area.
- _____ 50. I create process maps of current programs, services, policies, procedures, norms, unwritten rules, etc., to identify where they currently create inclusion as well as areas needing greater equity.
- _____ 51. I identify the discretionary points where unintended bias could result in differential treatment and experiences in planning and decision-making processes, hiring and development practices, programs and services, policies, procedures, etc.
- _____ 52. I continually research national/international trends and promising practices from peer institutions and other departments in the organization.

F. My self-work as an Inclusion Practitioner

- _____ 53. I am aware of my biases, assumptions, and stereotypes for the full range of privileged and marginalized groups.
- _____ 54. I continually interrupt, reframe, and unlearn my biases, stereotypes, and assumptions about members of privileged and marginalized groups.
- _____ 55. I understand how my various privileged and marginalized group memberships impact how I am perceived and experienced by others.
- _____ 56. I understand how my various privileged and marginalized group memberships impact how I make meaning of situations, and then how I react/respond.
- _____ 57. I am aware of how my beliefs about “what is “effective” _____ has been influenced by my socialization and experiences in my multiple privileged and marginalized group memberships (i.e., communication styles, decision-making practices, dialogue skills, conflict resolution, training, meeting management, supervision, advising...)
- _____ 58. I continuously use an Inclusion Lens to self-reflect to examine my behaviors, assumptions, feelings, and attitudes and their impact on others.
- _____ 59. I continually seek and utilize feedback about my behaviors and attitudes from members of privileged and marginalized; and utilize their input to improve my practice.
- _____ 60. I am aware of my “early warning signals” that I am beginning to feel triggered.
- _____ 61. I am able to notice and navigate my own triggered feelings of anger, fear, stress, grief, etc., so that I do not “work my issues on the group.”
- _____ 62. I am aware of my common triggers and their intrapersonal roots.
- _____ 63. I actively do my work around my triggers: explore their roots; do my healing work; etc.
- _____ 64. I actively expand my understanding of issues of diversity, equity, inclusion, and social justice.

3 Phases of Organizational Change

Source: EYCA Associates

Phase I: Increase Awareness & Commitment

Phase II: Build Internal Capacity

Phase III: Infuse Equity & Inclusion into Everything We Do

Selected Research ~ The Case for Inclusion

1. Evidence shows that learning in diverse environments improves critical thinking and leadership skills for all students.

(Milem, J., Chang, M., and Lising, A. (2005). *Making Diversity Work on Campus: A Research-Based Perspective*. Washington, DC: AAC&U)

2. Faculty and staff diversity correlates with success of historically marginalized students.

(Williams, R. (2000). Faculty diversity: It's all about experience. *Community College Week*, 13(1), 5.)

3. "...institutions of higher education are more influential when they offer students a social and intellectual atmosphere that is *distinctively different* from that with which they are familiar. Such an atmosphere creates greater discontinuity for students and subsequently improves the chances for enhanced cognitive and identity development."

(Milem, J., Chang, M., and Lising, A. (2005). *Making Diversity Work on Campus: A Research-Based Perspective*. Washington, DC: AAC&U)

4. "By contrast, institutions that have a homogeneous community and replicate the social life and expectations of their students' home communities are *more likely to impede personal and intellectual development* because students are not as challenged in these ways."

(Milem, J., Chang, M., and Lising, A. (2005). *Making Diversity Work on Campus: A Research-Based Perspective*. Washington, DC: AAC&U)

5. "Nearly all employers (96 percent) agree that 'all college students should have experiences that teach them how to **solve problems with people whose views are different from their own.**'"

(Falling Short? College Learning and Career Success (2015). National Surveys of Business and Nonprofit Leaders and Current College Students. Washington, DC: AAC&U <http://www.aacu.org/leap/public-opinion-research/2015-survey-falling-short>)

6. More than three-quarters (78 percent) agree that "all college students should **gain intercultural skills and an understanding of societies and countries outside the United States.**"

(Falling Short? College Learning and Career Success (2015). National Surveys of Business and Nonprofit Leaders and Current College Students. Washington, DC: AAC&U <http://www.aacu.org/leap/public-opinion-research/2015-survey-falling-short>)

7. In 2011, people of color made up 36.2% of the US population (13.1% black, 5.0% Asian, 16.7% Hispanic or Latino Origin, 1.2% American Indian and Alaska Native Persons, and .2% Native Hawaiian and Other Pacific Islander Persons).

(U.S. Census Bureau, "State and County Quickfacts, USA", 2012)

8. More than half of the growth in the total population of the United States between 2000 and 2010 was due to the increase in the Latino/a population.

(Karen R. Humes, Nicholas A. Jones, and Roberto R. Ramirez, "Overview of Race and Hispanic Origin: 2010," *2010 Census Briefs*, March 2011).

9. The number of high school graduates peaked in 2008-09 and will decline through 2014-15, still not recovering its peak through 2020-21.

(National Center for Education Statistics <http://www.thelawlorgroup.com/trends-2013-2>)

10. From 2012 to 2019, the number of white college students is expected to increase 5%, while the number of Hispanic students will increase 27%. ([College Board http://www.thelawlorgroup.com/trends-2013-2](http://www.thelawlorgroup.com/trends-2013-2))

11. As any admissions officer could tell you, the number of high-school graduates in several Midwestern and Northeastern states will drop sharply over the next decade, according to the Western Interstate Commission for Higher Education. Nationally, the number of black and white students will decline, and the number of Hispanic and Asian-American graduates will increase significantly. The nation's already seeing a sharp rise in first-generation and low-income graduates—the very students whom selective four-year institutions have long struggled to serve.

January 19, 2014, (Bracing for Demographic Shifts, Colleges Face Tough Trade-Offs, By Eric Hoover <http://chronicle.com/article/Bracing-for-Demographic/144085/>)

12. Less than 60% of college students currently are age 18-24. The proportion of students 25 and older will continue to grow.

(<http://blog.noellewitz.com/2011/10/11/government-projections-forecast-dramatic-growth-college-students-25-older/>)

13. Compared to a decade ago, 31% more international students were studying at U.S. colleges and universities in 2011-12. (Institute of International Education) <http://www.thelawlorgroup.com/trends-2013-2>

14. Several findings from <http://heri.ucla.edu/briefs/urmbriefreport.pdf> “The Climate for Underrepresented Groups and Diversity on Campus,” Sylvia Hurtado & Adriana Ruiz, June 2012.

- Underrepresented college students at low-diversity institutions reported more incidents of stereotyping, discrimination, and harassment on campus.
- Across the country, most incidents of stereotyping or harassment are not reported. Only about 13% of all students report racial incidents to a campus authority.
- 55.4% of Black students reported feeling some level of exclusion at low-diversity institutions.
- 60.4% of students of color on low-diversity campuses reported being the target of negative racial verbal comments. For Black students, the percentage was 67.2%.

15. Research continues to show that women, across race, experience a chilly climate on campuses, including sexual objectification, assumptions of inferiority, use of sexist language, and second-class citizenship. (Capodilupo, Christina M., Kevin L. Nadal, Lindsay Corman, Sahran Hamit, Oliver B. Lyons, and Alexa Weinberg (2010). “The Manifestation of Gender Microaggressions.” In *Microaggressions and Marginality: Manifestations, Dynamics, and Impact*, Derald Wing Sue, (Ed.), 193–216. Hoboken, NJ: Wiley and Sons, Inc.

http://www.aacu.org/ocww/volume39_2/feature.cfm?section=1)

16. Several findings from The 2010 State of Higher Education for LGBT People, a research study conducted by Campus Pride (for a copy of the Executive Summary ~ <http://www.campuspride.org/research/projects-publications>:

- LGBT students, faculty and staff feel that they face a lack of inclusiveness, more heightened safety concerns, and an abundance of harassment and discrimination on campus.
- Lesbian, gay, bisexual and queer (LGBQ) respondents experienced significantly greater harassment and discrimination than their heterosexual allies, and those who identified as transmasculine, transfeminine or gender non-conforming experienced significantly higher rates of harassment than men and women.
- LGBQ students were more likely than heterosexual students to have seriously considered leaving their institution as a result of harassment and discrimination.

Multicultural Organizational Development (MCOD) Goals

Jackson & Hardiman (1994)

- **Eliminate** exclusion and inequity
- **Recognize, value, and maximize** the benefits of social diversity **AND**
- **Create/revise** policies, programs, and services to meet the needs and support the success of the increasingly diverse student, faculty, and staff populations
- (**Prepare** and develop the next generation of leaders)

A Multicultural Organization

Bailey Jackson, Ed.D., and Rita Hardiman, Ed.D.

Use the following 0-10 scale to assess the current state of your organization:

0 = Not at all10 = Completely

- ___ 1. Clear **commitment** to create an inclusive organization.
- ___ 2. Seeks, develops, and values the **contributions and talents of all employees.**
- ___ 3. Includes **all members as active participants** in decisions that shape the organization.
- ___ 4. **Employees reflect diverse social and cultural groups** throughout all levels of the organization; and **demonstrate the multicultural competencies** to serve the increasingly diverse populations.
- ___ 5. **Acts** on its commitment to **eliminate** all forms of **exclusion/discrimination** within the organization, including racism, sexism, heterosexism, ageism, classism, ableism, religious oppression, etc.
- ___ 6. Follows through on **broader social and environmental responsibilities.**

MCOD Developmental Stage Model*

MONOCULTURAL ORGANIZATIONS

Stage 1: The Exclusionary Organization

- Openly maintains the privileged group's power and privilege
- Deliberately restricts membership
- Intentionally designed to maintain dominance of one group over others
- Overt discriminatory, exclusionary, and harassing actions go unaddressed
- Unsafe and dangerous environment for marginalized group members
- Monocultural organization

Stage 2: "The Club"

- Maintains privilege of those who have traditionally held power and influence
- Monocultural norms, policies, and procedures of privileged culture viewed as the only "right" way: "business as usual"
- Privileged culture institutionalized in policies, procedures, services, etc.
- Limited number of "token" members from other social identity groups allowed in IF they have the "right" credentials, attitudes, behaviors, etc.
- Engages issues of diversity and social justice only on club member's terms and within their comfort zone

NON-DISCRIMINATING ORGANIZATIONS

Stage 3: The Compliance Organization

- Committed to removing some of the discrimination inherent in the Club organization
- Provides some access to some members of previously excluded groups
- No change in organizational culture, mission, or structure
- Focus: Do not make waves, or offend/challenge privileged group members
- Efforts to change profile of workforce (at bottom of organization)
- Token placements in staff positions: Must be "team players" and "qualified"
 - * Must assimilate into organizational culture
 - * Must not challenge the system or "rock the boat"
 - * Must not raise issues of sexism, racism, classism, heterosexism...

Stage 4: The Affirming Organization

- Demonstrated commitment to eliminating discriminatory practices and inherent advantages
- Actively recruiting and promoting members of groups that have been historically denied access and opportunity
- Providing support and career development opportunities to increase success and mobility of members of groups that have been historically denied access and opportunity
- Employees encouraged to be non-oppressive through awareness trainings
- Employees must assimilate to organizational culture

MULTICULTURAL/INCLUSIVE ORGANIZATIONS

Stage 5: The Redefining Organization

- In transition
- Actively working towards developing an inclusive organization
- Moving beyond “nondiscriminatory,” “non-oppressive” to proactively inclusive
- Actively working to create environment that “values and capitalizes on diversity”
- Actively working to ensure full inclusion of all members to enhance growth and success of organization
- Questions limitations of organizational culture: mission, policies, programs, structures, operations, services, management practices, climate, etc.
- Engages and empowers all members in redesigning and implementing policies, practices, services and programs to: redistribute power/authority; ensure the inclusion, participation, and empowerment of all members; and meet the needs of the increasingly diverse populations served by the organization

Stage 6: The Multicultural Organization

- Mission, values, operations, and services reflect the contributions and interests of the wide diversity of cultural and social identity groups
- Leaders and members act on the organizational commitment to eradicate all forms of oppression within the organization
- Members across all identity groups are full participants in decision-making
- Actively works in larger communities (regional, national, global) to eliminate all forms of oppression and to create multicultural organizations

***Sources:**

Jackson, B. W (2006). Theory and practice of multicultural organization development. In Jones, B. B. & Brazzel, M. (Eds.), *The NTL Handbook of Organization Development and Change* (pps. 139 -154). San Francisco, CA: Pfeiffer.

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Marchesani, L. S. and Jackson, B. W. (2005), Transforming higher education institutions using Multicultural Organizational Development: A case study at a large northeastern university. In M. L. Ouellett (Ed.), *Teaching inclusively: Resources for course, department and institutional change in higher education* (pp. 241-257). Stillwater, OK: New Forums Press.

Indicators of Your Assigned Stage of MCOB

Directions: Use the following questions to discuss your assigned MCOB Stage. Make notes and be prepared to share insights and examples.

1. **Demographics** and **degree of multicultural competence** of leaders, managers, and employees
2. **Overall culture** of the organization: morale, conflict/tension, written and unwritten rules, etc.
3. **Common patterns of behaviors, attitudes, and feelings** of members of privileged and marginalized groups?
4. **Common practices/results/impact:** decision-making, communication, recruitment, retention, professional development, supervision, programs, services, etc.
5. **What are 2-3 generic/anonymous examples** that illustrate the indicators of this Stage?
 -
 -
 -

Indicators of a Redefining/Multicultural Organization (Stage 5/6)

Goals:

- *To engage the entire department/division/campus in a new kind of open dialogue about what it means to create and maintain the new, inclusive organization. To continually innovate, try new strategies, assess impact, and redesign programs, policies, and practices as needed.*
- *To continually reassess the current state and organizational needs, and implement change as needed to ensure the goals of diversity, equity, and inclusion are achieved in the department/division and on campus.*
- In transition
- Actively working towards developing an inclusive organization
- Moving beyond “nondiscriminatory,” “non-oppressive” to proactively inclusive
- Actively working to create environment that “values and capitalizes on diversity”
- Actively working to ensure full inclusion of all members to enhance growth and success of organization
- Questions limitations of organizational culture: mission, policies, programs, structures, operations, services, management practices, climate, etc.
- Engages and empowers all members in redesigning and implementing policies, practices, services and programs to: redistribute power/authority; ensure the inclusion, participation, and empowerment of all members; and meet the needs of the increasingly diverse populations served by the organization

A. Leadership

1. Leaders regularly discuss and communicate the division’s and the department’s vision and commitment to equity and inclusion for all students and staff to:
 - a. Create and maintain a safe, inclusive, and equitable work environment that:
 - i. actively engages and includes all staff,
 - ii. supports the full participation and success of all staff,
 - iii. is responsive to the needs of the increasingly diverse staff population,
 - iv. actively eliminates all forms of discrimination, exclusion, and oppression in the workplace.
 - b. Develop, implement, and continually assess policies, structures, programs, practices, and services that:
 - i. support the persistence, success, and graduation of the full breadth of students on campus,
 - ii. are responsive to the needs of the increasingly diverse student population,
 - iii. actively eliminates all forms of exclusion, discrimination, and oppression.
 - c. Hire and retain a racially diverse, culturally competent staff throughout all levels of the organization that (at a minimum) reflects the demographics of the student population across the breadth of differences.

2. Leaders regularly discuss the “business case” ~ compelling reasons why the division’s and the department’s focus on diversity, equity and inclusion is central to the achievement of their overall divisional strategic goals.
3. Leaders regularly share their personal passion and commitment to achieving the diversity, equity, and inclusion goals.
4. Leaders regularly communicate clear guidelines for expected behavior and clear consequences for exclusionary practices, inappropriate behavior, negligence, etc.
5. Leaders ensure the policies and procedures about workplace safety, harassment, hate crimes, non-discrimination, and inclusion are widely communicated, discussed, and enforced throughout the organization.
6. Leaders ensure that there are safe, confidential processes for reporting and resolving grievances, harassment, etc.
7. Leaders regularly attend programs and meetings exploring issues of inclusion and equity on campus and in the division.
8. Leaders develop and communicate a clear, concise list of multicultural competencies that all staff are expected to demonstrate in their daily work responsibilities.
9. Leaders demonstrate these core multicultural competencies in all aspects of their work activities.
10. Leaders ensure the successful completion of an annual comprehensive cultural audit (snapshot) of their division/department, including gathering baseline data; assessing policies, procedures, programs and services; analyzing demographic and assessment data; and developing measures of success.
11. Leaders engage department staff in dialogues about the results of the cultural audit (snapshot) and the recommendations for improvements.
12. Leaders meet quarterly with other department leaders to:
 - a. Review the current state of equity and inclusion within the division, and within each department
 - b. Develop plans for continuous improvement
13. Leaders provide needed resources and organizational infrastructure to ensure the success of equity and inclusion goals.
14. Leaders hold their direct reports and staff accountable for meeting the diversity, equity, and inclusion goals.
15. Leaders hold periodic open forums with staff to honestly discuss the current work climate and progress towards achieving diversity, equity and inclusion goals.
16. Leaders seek honest feedback from colleagues, members of their department, and students about:
 - a. Their effectiveness as a leader on issues related to diversity, equity and inclusion
 - b. The effectiveness of their staff on issues related to diversity, equity and inclusion

B. Planning and Decision-making

1. Planning processes intentionally include input from students and staff who are affected by the potential decisions and those who are involved in implementing the decisions.
2. Decisions are based on current data and input from a full range of stakeholders (i.e., climate and satisfaction surveys; utilization data; focus group data; input from open forums; etc.)
3. Decision-makers use the following prompts as they work to minimize any unintended exclusionary practices and attitudes in planning and decision-making discussions:
 - Do we have the full breadth of social identity groups and perspectives at the table? Involved in the process?
 - Does our process seriously consider the input and perspectives of a broad range of group memberships?
 - How might our unconscious attitudes and assumptions about ____ be playing out in this decision?
 - What could be the impact of this on students, staff, and faculty from various and intersecting privileged and marginalized groups?
 - How might this inadvertently advantage some and disadvantage others?
 - How can we make this more inclusive for members of various and intersecting social identity groups?

C. Supervision

1. Supervisors regularly discuss their commitment to the inclusion and equity vision and goals with direct reports, individually and as a team.
2. Supervisors regularly attend programs and meetings exploring issues of inclusion and equity on campus and in the division.
3. Supervisors demonstrate the divisional/departmental core multicultural competencies in all aspects of their work activities.
4. Supervisors communicate these multicultural competencies to their team members and work with each individual staff member to develop a comprehensive professional development plan to demonstrate continuous progress towards demonstrating these competencies.
5. Supervisors require direct reports to set clear, measurable and realistic inclusion and equity goals for their areas of responsibility.
6. Supervisors regularly assess the progress of direct reports on their inclusion and equity professional development goals, individual performance goals, and departmental goals.
7. Supervisors regularly discuss departmental progress towards equity and inclusion goals with direct reports and departmental staff.
8. Supervisors require their staff to participate in the cultural audits (snapshot) at the division and department level.
9. Supervisors work collaboratively with members of the department to review the results of the cultural audits (snapshot) and develop plans to:
 - Improve the work environment.
 - Align all policies, procedures, programs, and services with equity and inclusion goals.

10. Supervisors immediately respond to reports of inappropriate and/or offensive behaviors from staff in their department(s).

D. Recruitment/Hiring

1. Processes for recruiting and hiring are reviewed and revised annually to better achieve the goals of diversity, equity, and inclusion.
2. Staff continually expand their professional networks in the field and in the community to develop connections for marketing position openings, identifying potential candidates, etc.
3. Position announcements highlight the preferred multicultural competencies for the specific job responsibilities.
4. All stated “minimum requirements” are essential to the position.
5. Any educational or other credential(s) and years of experience are listed as preferred, unless mandated by laws or regulations.
6. Position announcement and list of preferred competencies are distributed to a wide range of organizations, colleagues, listservs, and publications to maximize the attraction of a racially diverse, culturally competent pool of candidates.
7. All members of Search Committees demonstrate core multicultural competencies in their roles and are committed to the divisional and department goals for diversity, equity and inclusion.
8. All Search Committees are diverse by race and other categories of diversity.
9. Hiring Manager and/or department leader meet with the Search Committee to discuss their commitment to hiring a racially diverse, culturally competent staff.
10. Search Committee members receive training to minimize the potential that their biases will impact the selection process.
11. Search Committee members use position description and list of preferred competencies and experiences as a guide as they review resumes, select candidates for interviews, develop interview questions, and evaluate candidates after interviews.
12. Search Committee members and participants in interview processes present a realistic view of the position, the campus environment, as well as the surrounding community with respect to issues of diversity equity and inclusion.
13. Hiring manager works with Search Committee to create a formal process to support the successful orientation and transition of new hires to the campus and local community (i.e., create a “Transition Team;” develop a formal mentoring process for all new hires; develop a plan for the new hire to develop working relationships with department team members and campus partners; etc.)

E. Professional development

1. All staff are required to annually assess their current level of multicultural competence and discuss goals for their professional development with supervisor.
2. All staff are required to participate in regular professional development activities to deepen multicultural competencies (trainings, workshops, courses, conferences, reading group, etc.)
3. Staff meet annually with supervisor to discuss their progress and revise development plans.

4. The division and departments sponsor regular professional development sessions for all staff to deepen their multicultural competencies across the full breadth of differences.

F. Performance management

1. All staff are required to continually assess and increase their level of multicultural competence.
2. All staff are required to demonstrate multicultural competencies in their daily work activities.
3. Supervisors conduct a formal performance session annually with each direct report, as well as informal discussions about performance at least every 3 months.
4. Leaders conduct an annual division-level analysis of performance ratings to assess if there are disparities across race, gender, rank, etc.

G. Orientation and transition of new employees

1. Supervisors conduct orientation and on-going transition meetings with all new employees to:
 - Review the division/department inclusion and equity goals
 - State their expectations for infusing inclusion into daily work practices
 - Identify current level of multicultural competence and plan professional development activities for the next 6-9 months
2. Supervisors meet regularly (weekly or bi-weekly) with new employees to explore:
 - a. How the employee is adjusting and integrating into the department/division
 - b. The employee's need for additional training, support and coaching
 - c. Any conflicts, misunderstandings or barriers they are encountering
 - d. Any needs for additional resources or information

H. Promotions, Interim Appointments, and Re-appointments

1. A candidate's ability to consistently demonstrate an advanced level of multicultural competence is a central criteria for all promotions, interim appointments, and re-appointments.
2. All processes for promotions/interim appointments are transparent, aligned with equity and inclusion goals, and developed in consultation with the divisional leader or her/his designee.

I. Research/Data Collection/Measurement

1. Departments regularly collect and analyze data (disaggregated by race, gender, year in school, etc.) on the effectiveness of their programs and services, including:
 - Satisfaction data from students
 - Utilization data by students
2. Departments annually collect and analyze disaggregated data about the work environment for staff. Assessment formats include focus groups, employee surveys, interviews, "skip level" meetings, etc.
3. Departments build a shared understanding of the practices that promote inclusion as well as those that result in indifference, exclusion and/or discrimination.

Steps to Strategic, Sustainable Organizational Change

1. Gain **leadership commitment** and support
2. Form an **Inclusion Change Team**
3. **Clarify and communicate the vision** and institutional benefits of an inclusive, socially just organization: create a sense of urgency and an expectation for shared responsibility
4. **Conduct a Comprehensive Cultural Audit** to assess the current campus dynamics and organizational readiness for systems change
 - Develop a deep understanding of the experiences of the multiple privileged and marginalized groups on campus and in the community
 - “Map out” and assess the current campus dynamics, climate, and structures (policies, practices, procedures, unwritten rules, norms)
5. **Identify the “Promising Practices”**
6. Top leaders and Inclusion Change Team **analyze data** from Cultural Audit and **develop Strategic Plan**
7. **Implement strategic activities**, including **accountability structures**
8. **Evaluate progress and revise** Strategic Plan and activities as needed

Next Steps for Individuals and Teams

1. Complete a “scan” of yourself using the following questions:

- **If people observed you for several days** (in meetings, as you interacted with colleagues and clients, scanned your office area, followed you on Facebook/Pinterest/Twitter, etc.):
 - **What might they assume about your commitment to equity & inclusion?**
 - **What issues of diversity, equity, and inclusion would they assume you care about?**

2. Begin a “scan” of your department’s physical environment, including office decorations, pamphlets, marketing, web site, office set-up, etc.

- Imagine you are coming into contact with your office for the first time. What impression do you have about the area's commitment to creating a welcoming, inclusive environment for all?
- Are all office areas and public spaces free of any offensive or insensitive images or materials?
- Scan specific visual items and note which ones contribute to a welcoming, inclusive environment, and which could be improved:
 - office decorations
 - pamphlets and other paper materials on display
 - web site statements, pictures/graphics, descriptions of programs and services, marketing
 - office set-up
- How accessible is the office space/web site for people with disabilities (mobility, visual, hearing, learning)?

3. Begin to review/analyze policies, programs, and services with an Inclusion Lens

- Who are we serving?
- What groups might not be getting all they need from our area?
- ✓ Identify 2-3 examples of a program, service, procedure, or policy **that has been intentionally designed** to meet the needs of people from different social identity groups.
- ✓ Identify 1-2 examples of a program, service, procedure, or policy **that could possibly be improved** to better meet the needs of people across a full range of social identity groups.

Ways to Use Group Identity Cards

Various Ways to Use Them with Your Team Members

1. Socialization experiences

- a. Invite each person to: Choose 4-6+ group identities that seemed to have **had the most influence in shaping your experiences as you were growing up.**
- b. Have them share stories, reflections and insights in groups of 3-4

2. Panning

- a. Ask folks to choose the cards that reflect the group identities they tend to notice and pay attention to when they are scanning/panning group dynamics in meetings

3. What is on your “screen?”

- a. Ask participants to make 3 piles or groupings of cards
 - i. Areas of diversity that you most often think about, are “on your screen”
 - ii. Those that you sometimes consider and think about
 - iii. Those you most often do not consider or think about
- b. Share in groups of 2-3
- c. Large group debrief

4. Your privileged and marginalized group memberships

- a. Ask participants to make several groupings ~ Categories of diversity where they are in:
 - i. A privileged group
 - ii. A marginalized group
 - iii. A group where they receive both marginalization and some forms of privilege
- b. Share in 2-3's: share examples and stories, insights

5. Which playing card are you, generally?

- a. Ask folks (after completing the playing card activity) to think about which “card” they get treated as:
 - i. In most situations
 - ii. In varying contexts
- b. Note: They can use the group identity cards to talk about the intersections of various cards that contribute to the various forms of treatment they receive in different settings

6. Next steps in your professional development

- a. Ask folks to make several piles/groupings to reflect what areas of diversity that they:
 - i. Know a lot about; could coach others
 - ii. Know some, but want to know more
 - iii. Don't know much; need to learn quickly
- b. Share in groups of 2-3
- c. Large group debrief

7. Which types of microaggressions do you interrupt effectively in a consistent manner?

- a. Ask folks to make several piles/groupings to reflect what areas of diversity that they:
 - i. Easily recognize the types of microaggressions that occur AND respond effectively
 - ii. Generally can recognize them in the moment, but struggle to respond effectively
 - iii. Not very aware or respond very effectively
- b. Share in groups of 2-3
- c. Large group debrief

8. Stereotypes

- a. Ask folks to make several piles/groupings to reflect what areas of diversity that they:
 - i. Recognize they still have stereotypes about privileged and/or marginalized groups
 - ii. Intentionally have worked hard to interrupt and unlearn the socialized stereotypes about privileged and/or marginalized groups
- b. Share in groups of 2-3
- c. Large group debrief

9. Beginning to analyze current policies, practices, services and programs with an Inclusion Lens

- a. Identify a practice, policy, program or service to analyze
- b. Ask folks to use the group identity cards to identify all of the marginalized groups that MAY be negatively (unintentionally) impacted by the current state; And/or have extra hurdles and obstacles given the current state
- c. Could also make several groupings:
 - i. Most likely negatively impacted
 - ii. Not sure if this group would be
 - iii. Probably would have needs met, advantaged, or at least not disadvantaged by the current state

10. Scanning how we present to others

- a. Ask people to “scan” you and your environment for a week or so
- b. Then use the cards to describe which topics of diversity you seem to talk about, champion, or care about based on what they observed about you:
 - i. in meetings
 - ii. in your office area
 - iii. on Facebook, Pinterest, Instagram
 - iv. as you interacted on campus

11. Conducting an Environmental Scan

- a. Divide up the 22 cards among team members
- b. People can work individually or in pairs
- c. Ask folks to each to use each card as a “lens” through which to observe, scan, and experience the unit to begin to assess how the environment sends messages about how welcomed, respected, and attended to members of various marginalized groups may feel Office decorations
- d. Ask folks to pay attention to everything, including:
 - i. Who is present in the office; how do they interact across group memberships?
 - ii. Office decorations, paintings, posters, bulletin boards
 - iii. Pamphlets, books, and other materials on display
 - iv. Web site statements, pictures/graphics, descriptions of programs and services, marketing
 - v. Office set-up
 - vi. How accessible is the office space/web site for people with disabilities (mobility, visual, hearing, learning) and language differences?
- e. Have people share their evidence and observations in staff meetings or at a retreat

Group Identity Cards

RACIALIZED IDENTITY	RELIGION/ SPIRITUALITY
GENDER EXPRESSION	EDUCATIONAL BACKGROUND
VETERAN STATUS	AGE
SOCIO-ECONOMIC CLASS (OF ORIGIN; CURRENT)	SKIN COLOR

NATIONALITY/ CITIZENSHIP	SEX ASSIGNED AT BIRTH (male, female, intersex)
GEOGRAPHIC REGION	RELATIONSHIP/MARITAL STATUS
CRIMINAL BACKGROUND	FAMILY MAKE-UP (OF ORIGIN, CURRENT; family constellation; household members)
IMMIGRATION STATUS	SEXUAL ORIENTATION/ SEXUALITY

YEARS OF EXPERIENCE (IN THE FIELD, IN ORGANIZATION)	POSITION & LEVEL IN THE ORGANIZATIONAL HIERARCHY
GENDER IDENTITY (Cisgender, Transgender)	SIZE/APPEARANCE/ ATHLETICISM
LANGUAGE PROFICIENCY/USE OF ENGLISH/"ACCENTS"	DISABILITY STATUS (Learning; Sensory; Mental health or psychological; Mobility; Neurodiverse; Chronic illness; ADD/ADHD; TBI; Autism/Asperger's, etc.)
WORK STYLE (EXTRO/INTROVERT RESULTS-PROCESS ORIENTED, ETC.)	ETHNICITY/ CULTURE

Credit/Non-Credit Status	Housing Status
Food Availability/Security	