



# THE CENTER FOR transformation and change

## Self-Assessment: Critical Skills for Inclusion Practitioners

**Tools and Strategies to Increase Your  
Capacity and Effectiveness as Change Agents**

Developed by Kathy Obear, Ed. D., 2014

**Directions:** Read each of the statements on the following pages and rate how often you **effectively demonstrate** 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.

1 2 3 4 5

**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.

1 2 3 4 5

**3** I describe the details or “facts” of what I observe/pan without judgment, assumption, interpretation or conclusions.

1 2 3 4 5

**4** I notice what issues of diversity are discussed effectively and which ones are ignored or not addressed productively.

1 2 3 4 5

**5** I introduce topics or issues related to diversity, equity, and inclusion that others do not seem to raise or bring up.

1 2 3 4 5

**6** I respond effectively when I notice stereotypic and/or exclusionary comments and behaviors in meetings.

1 2 3 4 5

**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.

1 2 3 4 5

**Section A Total** \_\_\_\_\_

## B. Engage others effectively

8 I encourage group members to participate and engage them in the process.

1 2 3 4 5

9 I use effective listening and communication techniques, including clarifying, paraphrasing, open-ended questions, etc.

1 2 3 4 5

10 I use “Connecting Language” that bridges one person’s comments to another’s.

1 2 3 4 5

11 I demonstrate empathy effectively.

1 2 3 4 5

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.

1 2 3 4 5

13 I use silence effectively.

1 2 3 4 5

14 I effectively use my tone of voice and nonverbal behavior to engage others.

1 2 3 4 5

15 I use humor appropriately and effectively.

1 2 3 4 5

16 I use self-disclosure and share feelings, thoughts, opinions, and personal experiences effectively.

1 2 3 4 5

17 I acknowledge and appreciate people’s participation.

1 2 3 4 5

18 I summarize discussions and make transitions effectively.

1 2 3 4 5

19 I effectively move discussions along and keep the group focused and “on track.”

1 2 3 4 5

20 I effectively include all members in the discussion.

1 2 3 4 5

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.

1 2 3 4 5

22 I effectively find some relevant point in participant comments, even those that seem way off the topic.

1 2 3 4 5

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.

1 2 3 4 5

24 I effectively help participants recognize assumptions and help them differentiate between observable facts and interpretations.

1 2 3 4 5

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.

1 2 3 4 5

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.

1 2 3 4 5

27 I can “meet people where they are” and not demand or expect them to be farther along in their understanding or skill development.

1 2 3 4 5

**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.

1 2 3 4 5

**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.

1 2 3 4 5

**Section B Total** \_\_\_\_\_

## **C. Facilitate discussions with an Inclusion Lens**

**30** I talk about the college’s commitment to diversity and inclusion.

1 2 3 4 5

**31** I state that it is everyone’s responsibility to help create a campus climate that is respectful and inclusive for all community members.

1 2 3 4 5

**32** I effectively discuss the common daily indignities and micro-aggressions that people from marginalized groups experience on campus.

1 2 3 4 5

**33** I effectively discuss specific behaviors and actions that help create an inclusive campus environment.

1 2 3 4 5

**34** I consistently demonstrate respect for all participants across privileged and marginalized group memberships.

1 2 3 4 5

**Section C Total** \_\_\_\_\_

## D. Respond 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.

1 2 3 4 5

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.

1 2 3 4 5

37 I effectively respond to participant behaviors I believe are distracting, including dominating, interrupting, side-tracking, side conversations, etc.

1 2 3 4 5

38 I acknowledge comments which sound inappropriate or triggering.

1 2 3 4 5

39 I engage people in dialogue when I experience one of their comments as inappropriate or triggering.

1 2 3 4 5

40 I recognize that “resistance” and challenges from group members are often doorways to deeper understanding and learning for the group.

1 2 3 4 5

41 I effectively navigate conflict and disagreement among group members.

1 2 3 4 5

42 I respond effectively to challenges and engage “resistance” from group members without taking it personally or feeling deeply triggered.

1 2 3 4 5

43 I can use triggering events as “teachable moments” for the group.

1 2 3 4 5

Section D Total \_\_\_\_\_



## **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 or program.

1 2 3 4 5

**45** I recognize what identity groups might not have their needs met given a specific policy, practice or program.

1 2 3 4 5

**46** I recognize possible unintended negative differential impact across group memberships given a specific policy, practice or program.

1 2 3 4 5

**47** I track current utilization of programs and services within your area by group membership.

1 2 3 4 5

**48** I continually gather data about the impact, perceptions, and experiences of the programs, services, climate, etc., by group membership.

1 2 3 4 5

**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 students, staff and faculty you served through our area.

1 2 3 4 5

**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.

1 2 3 4 5

**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.

1 2 3 4 5

**52** I continually research national/international trends and promising practices from peer institutions and other campus departments.

1 2 3 4 5

**Section E Total** \_\_\_\_\_

## **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.

1 2 3 4 5

**54** I continually interrupt, reframe, and unlearn my biases, stereotypes, and assumptions about members of privileged and marginalized groups.

1 2 3 4 5

**55** I understand how my various privileged and marginalized group memberships impact how I am perceived and experienced by others.

1 2 3 4 5

**56** I understand how my various privileged and marginalized group memberships impact how I make meaning of situations, and then how I react/respond.

1 2 3 4 5

**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...)

1 2 3 4 5

**58** I continuously use an Inclusion Lens to self-reflect to examine my behaviors, assumptions, feelings, and attitudes and their impact on others.

1 2 3 4 5



**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.

1 2 3 4 5

**60** I am aware of my “early warning signals” that I am beginning to feel triggered.

1 2 3 4 5

**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.”

1 2 3 4 5

**62** I am aware of my common triggers and their intrapersonal roots.

1 2 3 4 5

**63** I actively do my work around my triggers: explore their roots; do my healing work; etc.

1 2 3 4 5

**64** I actively expand my understanding of issues of diversity, equity and inclusion.

1 2 3 4 5

**Section F Total** \_\_\_\_\_

### Section totals:

**Section A Total** \_\_\_\_\_

**Section D Total** \_\_\_\_\_

**Section B Total** \_\_\_\_\_

**Section E Total** \_\_\_\_\_

**Section C Total** \_\_\_\_\_

**Section F Total** \_\_\_\_\_

**GRAND TOTAL** \_\_\_\_\_

*Continue to the next page for your results....*

## Results and Recommendations

### 256-320 points

Congratulations! You consistently demonstrate most of these Inclusion Practitioner tools and capacities.

You could increase your value to the organization by developing more ways to teach all of these skills to others.

Some examples include:

1. Organize colleagues to watch my free webinars and pausing to complete the activities ([www.drkathyobear.com/events](http://www.drkathyobear.com/events))
2. Facilitate “Lunch & Learns” on topics such as Recognizing & Interrupting Microaggressions or What is a Triggering Event ([www.drkathyobear.com/book-gift](http://www.drkathyobear.com/book-gift) *(animated video and outline for a Lunch & Learn)*)
3. Leading foundational workshop activities on diversity, equity, and inclusion

My [\*Master Class for Inclusion Practitioners\*](#) might give you the framework and resources to deepen the capacity of more leaders and colleagues to create inclusive organizations and implement meaningful, systemic change.

### 192-255 points

You believe you model many of these tools on a regular basis. You may want to seek feedback from a variety of your colleagues and partners to help identify your areas of strength as well as capacities they would recommend you develop to a greater degree.

Some examples of conversation starters:

1. “Would you be willing to share some of your observations with me about my strengths and capacities as a social justice educator as well as some feedback for areas I need to develop further?”
2. “In meetings and trainings, what are some ways that I have helped deepen the learning and capacity of others? Times my behavior has not been very useful?”
3. “In what ways could I speak up more or take greater leadership to help our team/department create greater equity and inclusion?”

My [\*Master Class for Inclusion Practitioners\*](#) might give you the platform and learning community to deepen your capacity to consistently show up as an effective leader and change agent in your organization and a powerful partner in creating greater equity and inclusion.

### 128-191 points

You would bring far greater value to your team and organization if you more consistently demonstrated these tools and behaviors in your daily work activities.

Consider starting with these:

1. Pay very close attention to group dynamics, notice by group membership who seems to feel included and who get treated in ways that may leave them feeling on the outside. Talk with 1-2 colleagues after meetings to share your observations and ask them about theirs.
2. Talk with a couple different colleagues or family members each week for a couple months about the types of microaggressions they notice or experience in the work environment.
3. Attend more programs and workshops on diversity, equity, and inclusion.
4. Watch 1-2 movies or documentaries each week to increase your knowledge and understanding of the dynamics of power, privilege, and marginalization people in marginalized groups experience in organizations and society.
4. Talk about your insights with colleagues who seem to know more than you do about these issues.

My [\*Master Class for Inclusion Practitioners\*](#) would be a powerful learning opportunity to deepen your capacity to consistently show up as an effective leader and change agent and help achieve your organization's equity and inclusion goals.

### 64-127 points

You would bring far greater value to your team and organization if you more consistently demonstrated these tools and behaviors in your daily work activities. In fact, your current behaviors might result in unintended challenges and microaggressions for your colleagues.

I recommend you commit to an intensive professional development program to deepen your capacity to create greater equity and inclusion in your roles and responsibilities.

1. Talk with your supervisor and people responsible for training in your organization to identify a wide variety of workshops and programs you can attend.
2. After each session, talk with your supervisor about what you are learning and ways to apply your insights in your work responsibilities.

My [free webinars](#) and [books](#) may be useful resources for your development plan.

## About The Center for Transformation and Change

### *Embrace Equity, Inclusion, and Social Justice to Ensure Success*

Under the leadership of Dr. Kathy Obear, The Center for Transformation and Change is committed to assisting organizations in creating inclusive and equitable environments where all people feel valued, respected and challenged to continuously strengthen their capacity to effectively meet the needs of the increasingly diverse populations that they serve.

[DrKathyObear.com](http://DrKathyObear.com)

## About Dr. Kathy Obear

A successful author of three books with over 30 years of experience specializing in conflict resolution, change management, and creating inclusive environments, Dr. Kathy Obear is a leading expert in helping to establish socially just environments where everyone feels valued and respected.

As the founder of The Center for Transformation and Change, Kathy has given speeches, facilitated training sessions, and consulted to top leaders at hundreds of universities, human services organizations, and corporations across the United States and internationally with a goal to increase the passion, competence, and commitment to create inclusive, socially just environments for all members of the organization.

Kathy is a Co-Founder of the Social Justice Training Institute ([www.sjti.org](http://www.sjti.org)). For 20 years, she and her colleagues have helped over 3,000 people deepen their capacity to be effective organizational change agents and to create greater racial and social justice.

Kathy makes it her mission to support leaders, helping them live up to their highest intentions as they actively work to create greater equity and inclusion throughout their spheres of influence.

Learn more at [DrKathyObear.com/about-kathy](http://DrKathyObear.com/about-kathy)

