



Creating Inclusive Organizations, Part 2 **Strategies to Build Meaningful, Sustainable, Systemic Change**

May 3, 2018 ~ Webinar

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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
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In It For The Long Haul: Overcoming Burnout and Passion Fatigue as Social Justice Change Agents

www.drkathyobear.com/selfcarebook | www.drkathyobear.com/selfcare

Purpose of this Webinar:

Deepen capacity of all members of the organization to infuse equity and inclusion into everything they do.

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 others

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

Multicultural Organizational Development (MCO) 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 client 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

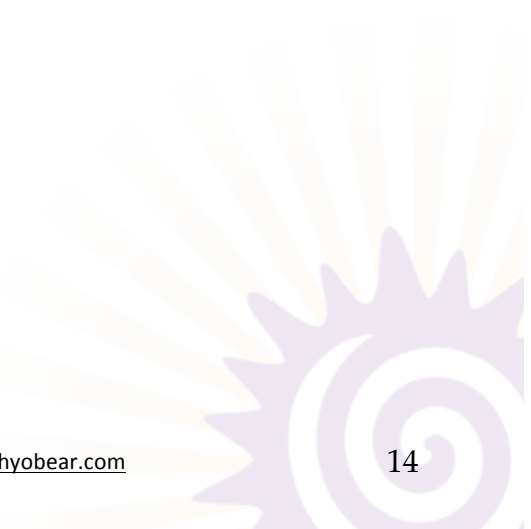
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Indicators of Your Assigned Stage of MCOD

Directions: Use the following questions to discuss your assigned MCOD 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/organization 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 in the 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

A. Leadership

1. Leaders regularly discuss and communicate the division’s and the department’s vision and commitment to equity and inclusion for all 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 clients,
 - ii. are responsive to the needs of the increasingly diverse client 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 client 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 in the division and throughout the organization.
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:
 - Review the current state of equity and inclusion within the division, and within each department
 - 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 clients about:
 - Their effectiveness as a leader on issues related to diversity, equity and inclusion
 - 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 clients 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 clients and staff 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 in the division and throughout the organization.
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 organizational 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 organization 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 organizational 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/M Measurement

1. Departments regularly collect and analyze data (disaggregated by race, gender, etc.) on the effectiveness of their programs and services, including:
 - Satisfaction data from clients
 - Utilization data from clients
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 organizational dynamics and readiness for systems change
 - Develop a deep understanding of the experiences of the multiple privileged and marginalized groups in the organization and community
 - “Map out” and assess the current organizational 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

Facilitating Progress Through the Stages of Multicultural Organization Development* (short version)

Directions: Start at the MCOD Stage you have chosen that best reflects the current state of your organization. Review the Strategic Actions and use the following symbols:

- (v) ~ all Strategic Actions that are currently in process
- (-) ~ any Strategic Actions that are in planning stage
- (*) ~ any Strategic Actions that seem possible and useful

Then review the Stages before and after using the same symbols.

Stage 1: The Exclusionary Organization

Strategic Actions: *The goal is to assess the current state, increase safety, decrease exclusionary and discriminatory practices, and make environment far less dangerous for the physical and psychological well-being of members.*

- Build a shared understanding of the current exclusionary practices and behaviors.
- Gather data about the impact of status quo on members of the department/division, overall organization, and the reputation of the institution
- Identify any internal and external demands, “levers for change” to shift the status quo (i.e., recent bias incidents, mission and values of the organization, current or potential law suits, drop in enrollment and retention, state and national priorities).
- Increase visibility of leaders reinforcing their commitment to create a safe, inclusive workplace environment.
- Identify and communicate clear expectations for expected behaviors and consequences for exclusionary behaviors.
- Ensure that all leaders, managers, and staff participate in required related trainings, including sexual harassment training, grievance procedures, etc.
- Continually monitor and report on efforts and outcomes to create greater safety for all groups in the department/division and in the organization.
- Gather good practices and benchmarks from peer institutions.
- Identify and work to resolve gaps between current mission/values statements and policies/reporting procedures (i.e., non-discrimination policy, hate crimes policy, sexual harassment, personnel grievances, etc.)

Stage 2: “The Club”

Strategic Actions: Goals ~ Continue to eliminate discrimination and harassment in the department/division and throughout the organization, and institutionalize policies and practices to increase the safety of all community members. Begin to assess the current state and create the infrastructure to implement strategies to (a) create an inclusive department/division and organizational environment and (b) successfully recruit, retain and promote leaders and staff who demonstrate the skills and competencies to effectively meet the needs of the increasingly diverse client populations. Increase visibility of top leader commitment.

- Continue and enhance work on all of the Strategic Actions in Stage 1, Exclusionary Organization.
- Create an Inclusion Change Team.
- Form the Change Team ~ Ensure that the membership represents a diagonal slice of the organization/department/division. Adjust members’ work load, as needed, to allow their full participation.
- Team development of Inclusion Change Team. Accelerate the skill and group development of the Change Team through retreats, in-depth equity/inclusion training, and authentic dialogue among members.
- Initial Assessment: Conduct a comprehensive Cultural Audit (clients, staff, partners, local community members) including climate assessment, data on recruitment, retention, promotion, development and career pathing, performance ratings, demographics by job position and salary, grievances and hate crimes, assignments of stretch opportunities, infusion of diversity into policies, programs, and services, etc.
- Feedback Session: Compile the data and conduct a Feedback Session with top leaders to diagnose results of Cultural Audit and discuss ways to ameliorate the exclusion and inequity.
- Examples of actions that could result from the Feedback Session:
 - Assess the current policies, processes, and practices and identify Discretionary Points where bias could enter these processes and create negative differential treatment of clients and staff.
 - Focus on influencing future recruiting efforts to hire leaders and mid-level managers with a demonstrated commitment and track record for creating inclusive work environments.
 - Revise, as needed, organizational mission, values statement, and Human Resources policies to address issues of inclusion directly and comprehensively.
 - Increase programs and workshops on equity and inclusion.
 - Create a Mentoring Program for staff and leaders from marginalized groups.
 - Increase resources for programs and services that promote the adjustment, retention, and success of members of marginalized groups, including mentoring, affinity groups, etc.
- Leadership Team Development: Work with the top leaders to increase their capacity to demonstrate effective leadership of this Inclusion Initiative.

Stage 3: The Compliance Organization

Strategic Actions: Goals ~ To build and implement an evidence-based Strategic Plan; increase the numbers of staff and leaders from marginalized groups; create structures to ensure they are welcomed and embraced by the organization.

- Continue to collect, analyze, and compare comprehensive data on climate, recruitment, retention, promotions, costs of status quo, etc.
- Top leaders and Inclusion Change Team develop a long-term Inclusion Strategic Plan; Measures of Success identified and communicated widely.
- Create meaningful dialogue among top leaders and members of marginalized groups and key allies.
- Create a “Reverse Mentoring” Program for top leaders and selected other key leaders ~ match leaders with a marginalized group member ~ goal of mentoring program is to both increase cultural competencies of leaders and support professional development and success of marginalized group members.
- Continue development and training of Leadership Team to increase depth of commitment and consistent demonstration of cultural competencies.
- Clarify and communicate clear expectations for quality of services and quality of experience for all clients and staff across group identity.
- Identify core competencies expected of all leaders and staff.
- Revise performance system to hold people accountable for demonstrating these cultural competencies.
- Implement a comprehensive initiative to increase the cultural competence of all leaders and staff.
- Integrate cultural competencies into Human Resources and all other training sessions.
- Form Unit Inclusion Committees that are linked to the Inclusion Change Team.
- Examine and revise policies, practices, and structures to include the goals of inclusion and cultural competencies expected of leaders and staff (i.e., job descriptions, department/division mission statements, decision-making processes, protocol to respond to grievances, hate crimes and sexual assaults, performance evaluations, reward structures, marketing materials, recruiting practices, hiring practices, promotional processes, career development processes, etc.)
- Require Inclusion Plans from all leaders and managers that identify measurable strategies to meet Diversity Goals.
- Implement a Mentoring Program for staff and leaders.
- Create meaningful opportunities for members of marginalized groups to meet.
- Create developmental opportunities for members of privileged groups to examine privilege, privileged culture, and explore their role in partnering to create change.

- Require all Search Committees to participate in a Diversity/Inclusion workshop designed to eliminate discriminatory practices and increase the hiring of candidates who demonstrate core cultural competencies.
- Examine and revise, as needed, all on-boarding and orientation/training programs of staff and leaders to address issues of inclusion.

Stage 4: The Affirming Organization

Strategic Actions: Goals ~ To continue to enhance the safety of all groups, and increase the numbers of marginalized group members in the organization. Increase attention to access and strategies to ensure success and professional development for all staff. Increase skill and competencies of staff and leaders to create programs, services, and processes to increase engagement and success of increasingly diverse staff and client populations.

- Top leaders review division/institution-wide data on recruitment, retention, development, career pathing, and promotions every 6 months.
- Conduct Cultural Audits for individual departments and divisions.
- Conduct Feedback Sessions with leaders, managers, and staff to diagnose data from Cultural Audits of their area.
- Charge existing or develop a Task Force to work directly with leaders to address issues raised in department/division Cultural Audits
- Train all staff and administrators how to integrate equity and inclusion into their day-to-day activities.
- Train leaders and managers to identify the “discretionary points” in policies, practices, and unwritten rules where bias and prejudice could result in negative differential impact and exclusion.
- Annual review by top leaders of Inclusion Plans from all leaders and managers in division/department.
- 6-month reviews by top leaders of Inclusion Plans from managers in unit.
- Good practices shared across divisions.
- Reward system and processes developed and implemented for champions and areas that make significant progress towards Inclusion Goals.
- Develop the internal capacity of a core group of staff and leaders to effectively use an “Inclusion Lens” in day-to-day activities.
- Develop a group of Internal Trainers/Coaches who can facilitate diversity awareness and skill sessions across the organization.
- Institute a series of required professional development workshops for leaders and staff to deepen their competencies and demonstrated capacities.
- Sponsor Dialogue Groups to facilitate authentic dialogue and understanding among members of privileged and marginalized groups.

Stage 5: The Redefining Organization

Strategic Actions: Goals ~ To engage the entire department/division/organization 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.

- New norms of the Inclusive Organization are communicated widely.
- Revise performance and reward systems, orientation/on-boarding, and development/training programs to highlight key skills and competencies that support the new norms and inclusive culture.
- Annual analysis and revision of all policies, practices and procedures to eliminate any unintended differential impact and exclusion.
- Create structures to ensure that an “Inclusion Lens” is actively engaged in all planning and decision-making processes.
- Continue to influence all recruiting efforts of leaders, managers, and staff to ensure they demonstrate commitment and success in creating and maintaining inclusive workplace environments for all constituents.
- Enhance community outreach efforts and partnership initiatives.

Stage 6: The Multicultural Organization

Strategic Actions: Goals ~ To continually reassess current state and organizational needs, and change as needed to ensure equity and inclusion in the department/division and in the organization.

- Implement Continuous Improvement strategies.
- Conduct regular, comprehensive Cultural Audits.
- Revise policies, practices, and norms as needed to maximize inclusion.
- Initiate regional efforts to share good practices, increase inclusion in all regional institutions.
- Partner with local and state government leaders.
- Stay current on efforts of peer institutions and other organizations.
- Continue to influence all recruiting efforts of leaders, managers, and staff to ensure they demonstrate commitment and success in creating and maintaining inclusive workplace environments for all constituents.

***Sources for MCOB Theory and Stage Model:**

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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.

Marketing Recommendations

PROCESS GUIDELINES

- Consider the following when developing overall themes and marketing messages:
 - What potential impact will this media have when viewed through multicultural and global lenses?
 - Do the images or visual presentations (including videos, PowerPoint presentations, Prezi's, etc.) evoke symbolism relevant in certain cultures?
 - Does the language or word choice call upon culturally-specific slang, metaphors, idioms, etc.?
 - Does the campaign include other elements (e.g., songs, dates, etc.) with historical contexts that might negatively impact people from certain cultures?

- Consider the following when making decisions about who and how people are represented in media and marketing materials and strive for continuous improvement in this area.
 - Notice what is depicted and happening by group membership visually and audibly
 - Who is/is not represented? present? depicted?
 - How often are people represented? present? depicted?
 - In what roles are people of various group memberships?
 - What are people doing? With whom are they doing it?
 - What is the placement/sequencing order?
 - What are the features/characteristics of those depicted?
 - What language is being used (titles, adjectives, pronouns, etc.)?
 - What feelings and attitudes are depicted or described?
 - Which groups are usually pictured/discussed in marketing materials?
 - Which groups are often not included?

(Adapted from materials developed by Elsie Y. Cross Associates)

CONTENT GUIDELINES

General Guidelines

- Avoid creating invisibility, stereotyping, and/or trivializing group identities.
- Shift the traditional ways of depicting people based on privileged and marginalized group identity.
- Intentionally include images, text, etc., that subtly challenge stereotypes.
- Depict realistic images and situations.
- Depict an inclusive environment: show a balanced and reasonable mix of group identities.
- Balance images and names by race, gender, gender identity, nationality, etc., in graphics, activities, text, etc.
- Avoid stereotypic images, phrases, names, situations, etc.

(Adapted from materials developed by Elsie Y. Cross Associates)

Images

- Use images that combat stereotypes.
- When documenting events, proactively and intentionally plan to capture images, videos, etc. that reflect all participants and their diversity.

Adapted from materials developed by Rachel Luna and Kathy Obear for ACPA, 2014

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Inclusive Onboarding Practices that Increase Retention

1. Networking ~ Increase connections with colleagues in your region

- Form a consortium among regional organizations to partner in onboarding activities
- Create a list of regional professional associations and organizations that new employees may be interested in
- Host networking activities to welcome and connect new hires within the organization and with members of the community
- Host regular gatherings over the first 12-18 months for new employees to meet and network among themselves; invite key leaders to attend and network with new employees

2. Mentoring

- Develop a formal mentoring program for all new hires.
- Assign each new employee 2 mentors: one mentor within their department; another mentor from a related department
- Host a gathering 1-2 times/year for all new hires and their mentors

3. Transition to the team level

- Design team-building activities to fast-track the new hires entry into the department.
- Schedule 1-1 meetings with the executive leader of the division and other divisions.
- Schedule a meeting with the President/CEO.
- Schedule “meet and greet” meetings with key colleagues and partners.
- Develop a professional development plan for new hires to ensure they receive critical information about organizational culture, procedures, policies, unwritten rules, etc.

4. Create a formal process of “Transition Teams” to support the successful transition of new hires

- Create “Transition Teams” to provide support to new hires over the first 12-18 months of employment.
- Team members to include a cross section of employees from their area and related departments.
- Have the team members plan how they will individually and collectively support their new colleague.
- Hiring Manager meets with the Transition Team and to review their plan to support the new hire’s transition.
- Ensure that their office space is ready when they arrive; have the keys, parking pass, ID card, etc., readily available; make sure the computer, phone, etc., are in working order.
- Find out when they intend to arrive on their first day, and plan to have members of the department available to greet them and help them move in, if possible.
- Plan how to get them introduced to all the key department colleagues and other partners.

5. Supervisors conduct orientation and on-going transition meetings with all new employees to:

- Review the division/department/organizational inclusion and equity mission and 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 9-12 months

6. Supervisors meet regularly (weekly or bi-weekly) with new employees to explore:

- How the employee is adjusting and integrating into the department/division
- The employee's need for additional training, support and coaching
- Any conflicts, misunderstandings or barriers they are encountering
- Any needs for additional resources or information

7. Website resources

- Expand the organization's website to include a section for prospective candidates that includes the Mission, Vision, Values, and any statements about the organization's commitment to creating an inclusive environment, and hiring and retaining employees who demonstrate the multicultural competencies and skills to meet the needs of the increasingly diverse populations you serve.
- Include links to information about the region, including the housing market, local schools, religious/spiritual organizations, etc.
- Provide easy links to employment related information, including descriptions of benefits, key human resources policies, professional and career development opportunities, etc.

8. Create institutional structures that encourage and reward efforts to increase multicultural competencies

- Create the opportunity for employees to participate in a training program to become a "Diversity Practitioner." Participants would develop deeper skills and competencies to track and recognize comments and practices that could undermine the organization's commitment to diversity and inclusion, as well as practice effective ways to respond and intervene in situations to create greater inclusion and fairness.
- Require all major committees and task forces have at least one "Diversity Practitioner."
- Schedule several programs each year that explore issues of integrating diversity and inclusion into daily practices, such as: panels of employees/supervisors discussing how they infuse issues of diversity and inclusion into their work; speakers and training sessions on the competencies to effectively serve various segments of the client population; roundtables of employees to share promising practices; staff retreats to increase skills/competencies and share best practices; etc.
- Require all staff to participate in a diversity and inclusion training sessions every 1-2 years.
- Infuse issues of equity and inclusion into all training and educational activities, particularly supervisor and management training.

- Add to the annual planning process: Planned strategies to increase the skills and competencies of current staff to serve the increasingly diverse client population; planned strategies to increase the pool of promising candidates for future job openings; planned strategies to increase the retention of current employees, especially those that demonstrate competencies and skills to serve the increasingly diverse client population.

9. Assess current practices and procedures

- Gather and analyze climate and organizational data on the past 5+ years
- Gather and diagnose data with an Inclusion Lens on most human resources activities, including: hiring pools; employee satisfaction; professional development opportunities; length of stay of new hires; performance ratings; etc.
- Identify and review/revise practices and procedures for reporting and resolving uninclusive or harassment situations.

From “White Supremacy Culture” ~ Tema Okun, *changework*

http://www.csworkshop.org/pdfs/CARC/Overview/3_White_Sup_Culture.PDF

- Perfectionism
- A sense of urgency
- Defensiveness
- Quantity over quality
- Worship of the written word
- Paternalism
- Either/or thinking
- Power hoarding
- Fear of open conflict
- Individualism
- Progress = Bigger, More
- Objectivity
- Right to comfort

Ways to Use Group Identity Cards

Various Ways to Use Group Identity Cards 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 with others in the organization, community

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

**Race/Racialized
Identity**

**Educational
Background**

**Customer-facing/
Back office**

Skin Color

**Gender Expression,
Presentation**

**Position & Level in the
Organizational Hierarchy**

**Immigration
Status**

**Religion/Spirituality/
Ways of Knowing**

Age

Veteran/Military Status

Disability Status

(Learning; Sensory; Mental health or psychological; Mobility; Neurodiverse; Chronic illness; ADD/ADHD; TBI; Autism/Asperger's, etc.)

**Socio-Economic Class
(of origin; current)**

Size/Appearance

**Relationship/
Marital Status**

**Family Make-Up
(of origin, current; family
constellation; household
members)**

**Years of Experience
(in the field, organization)**

**Geographic
Region**

**Sexual
Orientation/Sexuality**

**Housing
Status**

**Language Proficiency/
Use of English/
"Accents"**

**Criminal
Background**

**Gender Identity
(Cisgender, Transgender)**

Work Style
(extrovert or introvert, results
or process oriented, etc.)

Sex Assigned At Birth
(male, female, intersex)

**Ethnicity/
Culture**

**Nationality/
Citizenship**

**Food Availability/
Security**

**Revenue producing/
not revenue producing**

Athleticism