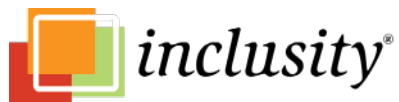




INCLUSION TOOLKIT

for HANCOCK COUNTY





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Welcome

How to Use this Toolkit

Welcome! We created this toolkit specifically to support your efforts in building a more inclusive, diverse workplace. A culture of inclusion engages and values *all* employees, no matter what Elements of Individuality they have. (You'll learn all about Elements of Individuality in this toolkit!)

Awareness, trust, and connection form the foundation for inclusion, and our toolkit materials will help you build these essential pieces in your organization. The tools also promote action because, ultimately, it's people's behaviors that will drive inclusion.

This toolkit includes approximately eight hours of IDE* training materials, including both participant and facilitator guides. Each training module (~1-2 hours) can stand alone or be combined for a longer training experience. At the start of any training, use the welcome and introductions module.

We've also included two assessment instruments: an inclusive policy tool and a climate survey. The policy tool provides guidance in examining the organization's procedures and policies so that you can amend language and processes to be more inclusive. The climate survey can help you determine a baseline of where your organization currently stands in regard to IDE and that you can deploy in the future to measure progress.

Before you begin to implement this toolkit, review our tips for leaders. This starts with "doing your own work." This means identifying your biases, blind spots, and areas in which you could behave more inclusively. As your organization's leader in the IDE space, you'll need to role model inclusive behaviors and openness to diversity so you'll have credibility leading this initiative.

Our Inclusivity staff is here for you if you ever need guidance or support. Feel free to reach out to us with any requests for additional support. We feel privileged to be able to partner with you in creating a more inclusive culture.



Maria Arcocha White

**We believe inclusion comes before diversity, so we use the acronym IDE (inclusion, diversity and equity) instead of DEI.*

Improve Business Performance through **Diversity and Inclusion**

Inclusivity's mission is to help organizations build inclusive cultures. This is not just the right thing to do; it will also help your company perform at its best!



Boost Productivity and Innovation

Companies that are more inclusive are more profitable. According to a 2020 McKinsey & Company report, companies in the top quartile of ethnic diversity are 36% more likely to outperform their peers. On the flipside, those in the lowest quartile were 27% more likely to underperform. According to a 2017 Deloitte analysis, companies with inclusive policies generate up to 30% higher revenue per employee. Diverse perspectives ultimately enhance problem-solving and generate new ideas. For instance, Deloitte found that diversity of thinking styles among a company's employees has been found to increase innovation by up to 20% and reduce risks by 30%.

Drive Engagement

When employees feel valued and empowered, they are more likely to engage and contribute more fully. Research from Gallup notes that team members with higher levels of engagement produce substantially better outcomes, increasing profitability by 21%. And there is evidence that inclusion is closely linked to employee engagement, notes McKinsey.

Attract and Retain Talent

An inclusive culture can help an organization both attract and keep employees. The talent pool itself is rapidly diversifying: 44.2% of millennials are racial/ethnic minorities, and the current K-12 population in the United States is 53.8% non-white. Applicants are increasingly seeking out inclusive companies. For example, Paradigm reported that 54% of employees would consider leaving their company if it failed to speak out about social justice.

Improve Competitiveness

Finally, an inclusive culture will help you improve your internal processes and your competitiveness. Working toward inclusion often involves implementing communication and other management strategies that have additional positive effects within the company that extend beyond inclusion. Looking externally, McKinsey reports that there is a widening profitability gap between inclusion "winners" and "laggards": being proactive about making your company more inclusive will help guarantee you'll be one of those "winners."

Working toward building a more inclusive workplace isn't just the right thing to do, it's also vital to having a thriving, successful business. To unlock the potential for successful diverse teams, inclusive leadership is crucial. Leaders need to commit to lead every day by example to ensure that all team members feel they are treated respectfully and fairly, are valued, and belong.

■ Tips for Leaders

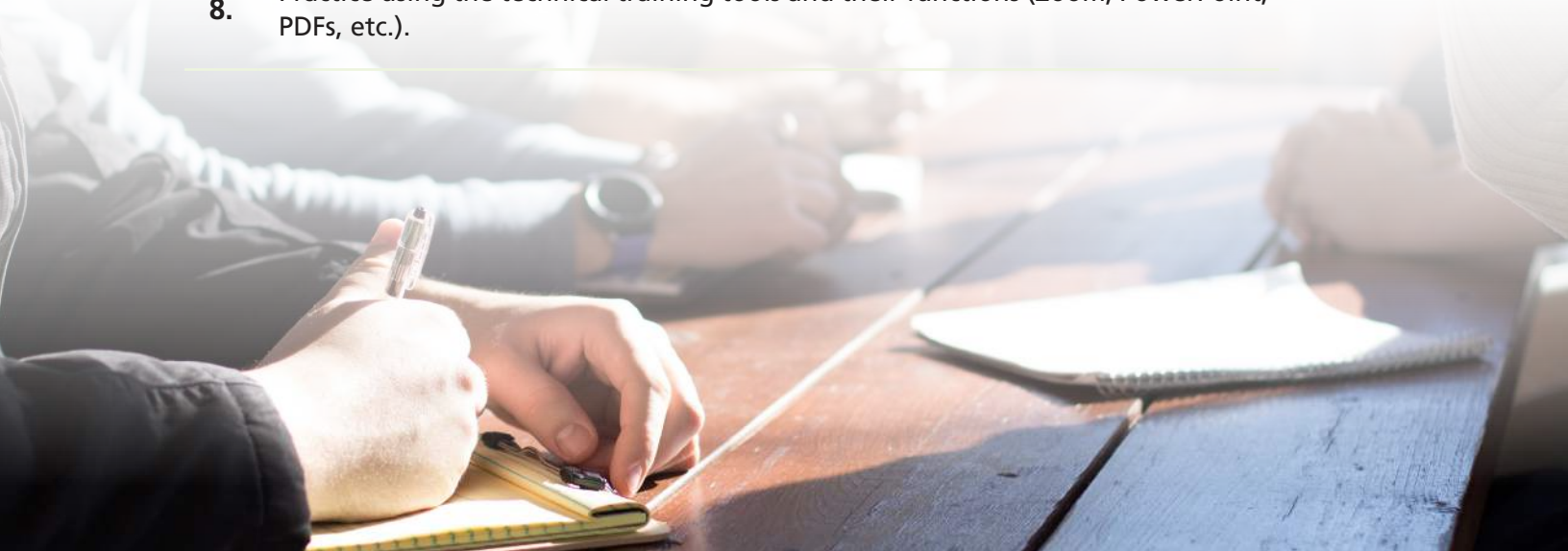
PREPARING YOURSELF TO LEAD THIS WORK

Grow your own awareness and knowledge before leading others. For ideas, refer to the Take Inclusive Action steps on page VIII.

PREPARING YOURSELF TO FACILITATE TRAINING

Before the Workshop

1. Prepare your own discussion-advancing questions to keep interaction going.
 2. Make your notes visible so you can see them and quickly reference them without fumbling.
 3. Time yourself through presentations. Make note of allotted times for each content area.
 4. Times for exercises can vary depending on workshop. Use your outline to adjust accordingly.
 5. Areas in which time is referenced inside an exercise are there because certain sections can be tricky to stick to time; these times can help you chunk out your overall time throughout the larger unit.
 6. Familiarize yourself with Inclusivity content and do your own research to enhance the content.
 7. We have provided with definitions of all key terms in the appendix, so that facilitators can speak the same language.
 8. Practice using the technical training tools and their functions (Zoom, PowerPoint, PDFs, etc.).
-



During the Workshop

#1

It's important to understand that participants are entitled to believe what they choose to believe. Your role as a facilitator is to challenge them to examine those beliefs.

- Don't be surprised if you are challenged. In fact, expect pushback. It is part of the process. Don't be shocked. Don't personalize. Stay centered and focused on the workshop objectives.
- Manage your own personal biases. Understand that you will have them, but make sure that they don't impact your group/room negatively.
- Be empathetic toward others, knowing a participant may say something that may trigger your biases. Remain in control and remember there are teachable moments in every challenge.

#2

Be prepared to be supportive if participants get overwhelmed.

- This content is very basic; however, if participants have never done this work or decide to go all in, then this may challenge them emotionally.
- Let them know, "It is OK to feel those emotions, but we don't want to hang out there too long."
- Sometimes it is OK to just listen and bear witness and take it in. You do not need to solve for participants.
- Listen all the way to the end of participants' sentences and hear it and feel it. And take time before responding.

#3

Enjoy learning from the participants too.

- They bring this content to life with their experiences and ideas.
- Be curious and manage time.

After the Workshop

- To continuously improve your comfort with the material, we recommend that you reflect on your facilitation of your most recent session, noting areas for growth and areas of strength. Request feedback from participants.
- Facilitating this workshop may have an emotional impact on you. Self-care is critical to your well-being. It is important that you do the necessary things to take care of yourself. That could include meditation, proper rest/sleep, exercise, and reaching out to Inclusivity. We are here for you if you need us.

Take Inclusive Action

1. IDENTIFY YOUR OWN BIASES

We are all biased! Investigate the assumptions you make about others and reflect on the experiences that inform your biases. When you're aware of your biases, you can choose to manage them.

2. BUILD TRUST WITH COLLEAGUES

Reach out to others and let them know you care. And show that you're open and willing to have difficult conversations.

3. GET OUT OF YOUR COMFORT ZONE

Intentionally put yourself in new and unfamiliar situations. Stretch yourself to expand your horizons and form new kinds of relationships.

4. ASK FOR HONEST FEEDBACK.

If you're having trouble getting constructive feedback, ask more specific questions. (e.g., "What can I do to become a better employee?" or "What is getting in the way of my success?")

5. EXPAND YOUR DECISION-MAKING CIRCLE

When facing a problem or decision, gather input from people on different teams, with different backgrounds, and/or with different Elements of Individuality.

6. SEPARATE INDIVIDUALS FROM THEIR BIASED BEHAVIOR.

Remember that we're all biased, and we all deserve the space and grace to work on our biases. Be patient and curious with others and avoid responses that will provoke defensiveness (e.g., "That was so racist").

7. LOOK FOR EXCLUSION – AND DO SOMETHING ABOUT IT

Invite people into spaces and conversations they weren't welcome in before. Identify and eliminate the barriers to inclusion.

8. BE CURIOUS – LEARN ON YOUR OWN

Teach yourself by reading, watching or listening to work about and by under-represented people. Go to concerts, art exhibits, museums, and other activities where you can be surrounded by diversity.

9. NOTICE AND WORK YOUR NATURAL DEFENSIVENESS

When we put ourselves in stretch zones, our natural inclination is to reject a challenging experience. Notice your defensive reactions, take a breath, and respond in a constructive, validating way.

10. RECOGNIZE THAT YOU WILL MAKE MISTAKES

It's okay to be uncomfortable and/or make mistakes; approach them as learning opportunities. If you're willing to be uncomfortable, you will eventually grow your cultural competency and be rewarded by a swathe of diverse relationships and experiences.

■ Unit 1

Metrics & Assessments



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Inclusivity created this tool to help you review internal policies to make your organization more inclusive and equitable. Each section of the tool discusses some aspect of policy assessment, from types of policies to watch out for to a guide for writing more inclusive policies, as well as many topics in between.

Before diving into any of these areas, it's worth taking a moment to step back and think about your organization's mission and values. Consider how the mission and values translate into particular goals for organizational policies. For example, if one value is "provide a work environment where employees are supported and their concerns are addressed quickly and effectively," you might write the policy goals "provide opportunities for mentoring and employee support" and "maintain systems for reporting incidents and respond comprehensively to these incidents." Note that you might consider opening your employee handbook or like policy document with an explanation of the policy goals and how these goals connect to the organizational mission and/or values; such an introduction can help ground the specific policies in the document.

Establishing these goals in advance will offer perspective when reviewing a given policy, and it may help you identify places where existing policies need to be replaced or added onto rather than tweaked. In essence, it will provide a specific lens through which to examine existing policy.

OVERVIEW OF TOOL SECTIONS

- **Types of policies to know:** We describe three broad types of policies to look out for. Two are types that should be avoided, whereas one describes how to write more inclusive policies.
- **Tests for current policies:** We list some of the questions you should ask yourself when reviewing a given policy, including how to change policies based on how you answer those questions.
- **Domains of policy to consider:** We review some of the areas of workplace policies where employees are most likely to experience disadvantage or more negative outcomes, particularly those belonging to marginalized social groups. We highlight some common bad policies and make suggestions for changes.
- **Writing inclusive policy:** We provide some recommendations for writing more inclusive policies.

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Types of Policies to Know

This section describes three broad categories of policies. Curb cut policies are beneficial and should be sought out, whereas poll tax policies should be eliminated and “old boys club” policies should be revisited. For each of these types of policies, we define it, explain some of the history leading to the term, describe its potential application in the workplace, and note the implications for assessing and writing policy.

CURB CUT POLICIES

These policies are somewhat beneficial for everyone but are particularly beneficial for individuals belonging to a disadvantaged group in a given domain.

For much of American history, pedestrians had to step down off the curb when walking from the sidewalk onto the street. Due to disability rights activism throughout the '60s and '70s and then with the advent of the 1990 Americans with Disabilities Act (ADA), sidewalk construction changed to include a “curb cut,” a ramp providing a smooth transition from the sidewalk to the road. As curb cuts became more widespread, more and more people realized their benefits extended beyond easing movement for individuals in wheelchairs, people with visual impairment, and individuals with other disabilities. For example, curb cuts helped people pushing strollers, people using dollies to haul large objects, children on scooters or bicycles, etc. A curb cut helps everyone, but particularly helps the people who need it most.

There are many curb cut policies that help promote inclusion in a workplace. For example, mandatory mentoring for all new employees helps everyone by expanding their professional network, acclimating to a new work environment, promoting communication in the organization, etc. However, it particularly benefits members of historically underrepresented groups, who are less likely to be selected for mentoring informally and may doubt their belonging in the organization to a greater degree than other employees. Creating media featuring people from different backgrounds reminds everyone that the organization is diverse, but directly communicates to marginalized employees that they are welcome.

When thinking about how to implement new curb cut policies, start by identifying the areas where employees belonging to historically underrepresented groups lag behind others. Instead of deploying a targeted policy to specifically aid these individuals, consider instead what opportunities exist to assist these employees while also benefiting others. One added benefit of curb cut policies is that they eliminate any perception that particular individuals are receiving “special treatment.”

POLL TAX POLICIES

These policies appear to apply to everyone equally but in practice have a disproportionate negative impact on individuals belonging to a disadvantaged group in a given domain.

For most of the history of colonial North America, the overwhelming majority of Black people were enslaved, and none were allowed to vote. Black men obtained the right to vote as a result of the 15th amendment and black women by way of the 19th amendment. However, since the amendments' ratification, a series of policies have been enacted in many states to restrict the voting rights of Black citizens. For example, in the wake of reconstruction, numerous states made vagrancy illegal and forbade people with felony convictions to vote. Because recently emancipated Black people were more likely to be poor and/or unhoused than white people,

they were disproportionately impacted by these policies. A more famous example is the poll tax, which required would-be voters to pay a fee to vote. Again, because Black people had less economic capital than white people, this policy disproportionately impacted them. The Voting Rights Act and Civil Rights Act outlawed many of these policies, but new poll tax policies have been enacted with similar results. For example, laws that require voters to have valid state-issued IDs to vote disproportionately exclude voters of color, particularly Black voters. Even outside the domain of voting, there are many other poll tax policies in America, such as the war on drugs.

Poll tax policies can also show up in work environments. For example, very inflexible work schedules often have a disproportionate impact on female employees, who often bear the brunt of childcare responsibilities and must be able to pick up, drop off, or otherwise care for their children at particular times. Furthermore, using only traditional federal holidays as paid holidays can disproportionately disadvantage people with non-Christian religious faiths, who are often required to use their vacation time to celebrate their religious holidays when they would be more than happy to work on, say, Christmas Day. As one final example, company healthcare benefits may cover husbands/wives, but not domestic partners or other long-term committed partners.

When working to identify poll tax policies in your organization, gather some information from employees from different social backgrounds about what makes them feel excluded or not considered in the workplace; many of these experiences stem directly from poll tax policies. Next, when looking at a given policy, think about the assumptions that policy makes or the variables underlying it. For each assumption/variable, ask whether it is reasonable to expect that assumption/variable to apply equally across individuals belonging to different social groups.

“OLD BOYS CLUB” POLICIES

These are policies that have been in place for a long time and have not been updated to reflect the new reality of a workplace as one that comprises individuals of many different identities, not just white men.

More and more attention is being paid to the statistical overrepresentation of white men in the upper echelons of American society. Even more notable than their current overrepresentation is their historical overrepresentation; until very recently, white men comprised nearly all the upper management in the overwhelming majority of American companies and other organizations. This historical overrepresentation matters because the individuals who establish a culture have an outsized influence on the culture that persists beyond the tenure of those individuals. Those early movers set the cultural feedback loop into motion; the existing culture influences those who come later, limiting their ability to change the culture. This explains how the influence of white men can persist even in the face of increasing organizational diversity. Though many elements of the culture involve unwritten or implicit practices like norms, others are explicitly codified in policies. Importantly, both types can be changed through new policies.

In workplaces, “old boys club” policies often manifest in practices like traditions, ways of doing things, and other practices companies adopt to distinguish themselves from their competitors (i.e., their personal “brand”). For example, employees may be expected to be able to attend meetings with little notice or check their email over the weekend. There may be an annual Christmas party with lots of free alcohol or a summer company retreat to a

camp in the woods. These policies are not inherently harmful, but because they were usually established by white men, they can sometimes fail to accommodate the needs of employees with other demographic backgrounds. Sometimes the policies remain in place not because they are popular or work for many people, but simply because they represent the way things have traditionally been done.

“Old boys club” policies are often difficult to change because changing them can feel like an attack on a company or organization’s unique culture and heritage. It can feel as though its “vibe” is being replaced with generic, standard-issue corporate culture. In reality, revisiting and changing these policies presents exciting new opportunities to shape the culture in a way that is more inclusive and welcoming to everyone. It’s entirely possible to maintain a unique culture and brand while also ensuring people from different backgrounds have their needs met. When thinking about these policies, consider the underlying goals of the policies rather than the policies themselves. Are the existing policies the best way to accomplish these goals, or would alternative methods be better? The goals you identify through the process can be used to guide other decisions and craft new policies

TAKEAWAYS FROM THIS SECTION

This information will equip you with the skills you need to identify these kinds of policies and make needed changes. If you’re not sure whether or how a given policy fits into one of these categories, ask some people! It’s preferable to take the time to solicit additional opinions rather than write something you think is correct but is actually poorly calibrated to employee needs. This type of approach is how our society ended up with some of the more exclusionary policies in the first place!

Test of Current Policies

This section offers some questions for you to ask about the policies you review. These are very general, broad questions that will be applied to very specific policies; not all will be appropriate for every policy, and you may want to change the wording of the question slightly to make more sense in the context of your review. Each “test” examines a particular concept or idea, which we have then paired with a specific question. We also explain why each test is important and give an example of policies that would and would not pass this test. Knowing the underlying concept and the rationale should also help you write new test questions more tailored to the specific policies you examine.

ACCESS: Who has access to the required resources or information?

This is an extremely wide-ranging test, as “resources” and “information” are very broad categories. Essentially, you want to take a step back from the policy and ask yourself whether people from different backgrounds will have the prerequisite knowledge and resources needed to comply with that policy.

For example, some organizations require potential employees to complete job tests, though sometimes these tests ask general knowledge questions that aren’t directly related to job skills, seemingly as an attempt to measure general intelligence (e.g., “Who was the first person on the moon?”). Asking these kinds of general knowledge questions is likely to make the test biased against lower-income individuals, who tend to go to poorer schools and may face other life circumstances that require them to leave school. In most places in the U.S., lower-income people are also disproportionately likely to be people of color. Most job tests should focus more on responsibility-related questions. If measuring some form of “general intelligence” or problem-solving ability is truly important, the job test may include spatial, quantitative, or deductive reasoning questions, which tend to be less biased.

CLARITY: Are things laid out explicitly or is jargon being used?

When we’re familiar with the lexicon in a certain domain, we use it with ease and often don’t even think about whether that language is clear to others. A psychologist wouldn’t think twice about including the terms p-hacking, TMS, or Likert scale in a presentation, though those terms are probably unclear to most readers. When we write policy, we need to make a point to determine whether we are including language that is clear to everyone or if it requires any kind of preexisting knowledge.

One obvious example of unclear language that appears in many areas is “business casual.” This term is usually clear to people who have spent some time working in white collar business settings, but much less clear to people who don’t have such experience. Another common example is referring to “appropriate behavior” without actually describing what kind of behavior is appropriate. Instead, be explicit and clear instead of using jargon. For example, dress codes should comprise specific lists or descriptions about the kind of clothing that is (or is not) acceptable. Appropriate and inappropriate behavior should be explicitly defined and explained. When policies are vague, it is much more likely that they will be enforced differentially, to the detriment of marginalized individuals.

TERMINOLOGY: Is coded or offensive language being used?

Another way language can affect policy is by including coded terms or offensive language that implicitly or explicitly invoke members of different social groups. Coded language is also sometimes referred to as “dog whistles.” For example, the word “ghetto” usually implicitly brings Black people to mind. The inclusion of these terms in policy is rarely intended to cause harm, but often has that effect.

This is another domain where dress code policies often err. One relatively clear-cut example of a biased policy is by banning afros, corn rows, and other hairstyles that Black people commonly wear. A less clear-cut example of coded terminology in a hairstyle policy is stating that “exotic” hairstyles are not acceptable. The term “exotic” is commonly associated with non-white people, so this policy implicitly singles them out. Furthermore, the term “exotic” fails to pass the clarity test. This test is one where it’s especially important to get feedback from others to detect potentially exclusionary or offensive language.

Note: Restrictions on particular forms of dress or hair style are also often “old boys club” policies. There’s sometimes an idea that people in a particular role should have a certain “look,” so policies are put in place to restrict individuals to that look. This points to an important aspect of a policy review, which happens to also be the next test!

REAL WORLD: Does the policy make sense in the context of the real world or just within the universe of your organization?

As mentioned, the policies likely to fail this test often fit into the “old boys club” type of policies. Sometimes the reality being constructed within an organization becomes too different from the world outside the organization, which can have important implications for the kinds of new talent the organization can attract.

For example, many organizations have policies against employees having visible tattoos or certain facial piercings. These body alterations have historically been considered unprofessional, thanks at least in part to backlash from the cultural revolution in the 1960s. Many organizations across fields are currently reconsidering these policies, though, given how much more common tattoos and piercings have become and how attitudes toward people with them have changed accordingly. Another common example is not having policies that incorporate the needs of LGBTQ+ individuals, since the queer rights movement has only recently come to prominence. Parental leave and similar policies may have to be updated to be better calibrated with social reality outside the organization.

FLEXIBILITY: How flexible is the policy?

You might think we’d advocate for policies that are as flexible as possible, but it’s often preferable to have relatively inflexible policies in many areas. When policies are very open-ended and flexible, that opens the door to differential treatment, which usually disadvantages people from underrepresented groups. Members of these groups are likely to be disciplined more harshly or not “take advantage” of flexibilities in policy. The key is to hit a sweet spot in terms of flexibility, so the policy accommodates people with different needs (i.e., is not a poll tax policy) and clearly lays out the consequences (positive or negative) for different kinds of actions.

As the explanation implies, disciplinary policies are especially likely to fail this test. These policies sometimes state that “appropriate action” will be taken if the policy is violated without laying out what that action is. Instead, disciplinary policies should clearly lay out how someone will be reprimanded based on occurrence of the offense (first, second, etc.) or the seriousness of the offense (again defined objectively). Policies that have to do with positive consequences should be similarly clear, e.g., defining what percent of the profits from a new product the employee who devised the product will be rewarded as a bonus.

BIGOT TEST: Could a bigoted individual use this policy to justify discriminatory behavior?

In many (if not most) organizations, most of the bias that occurs is perpetrated by a numeric minority of individuals who harbor strong explicit and/or implicit biases against other groups. Keep this insight in mind when constructing policy; rather than focusing too heavily on the potential missteps of well-intentioned team members, think instead about how people may try to use these policies to exclude others while abiding by the letter of the law. You essentially want to “close the loopholes” that allow these people to use policies this way.

Consider a policy that states that customers who are behaving in a disruptive way will be asked to leave a business. The definition of “disruptive” is highly subjective (see the clarity test). For instance, it could easily be used to justify asking a person of color to leave the store even if a white person was engaging in similar behavior and not asked to leave. A similar effect could even occur with a policy like allowing managers to give merit-based bonuses. If the manager gets to define merit, then they could use this policy to justify giving heftier bonuses to, say, employees who look more like them. Some of the work you do to get policies to pass other tests will have the effect of closing some of these loopholes, but you should still put on the hat of a bad actor who is trying to act in a biased way under the radar and see whether existing policies truly stop you from doing so.

TAKEAWAYS FROM THIS SECTION

The concepts described and specific questions listed in this section provide a series of tests against which existing policies and newly written policies alike can be judged. One key theme is that outside perspectives are often needed to ensure you pass these tests: a white, Christian woman is unlikely to be able to accurately assess whether a given policy will adequately accommodate the needs of a black, Muslim man, for example. Rather than making guesses or assumptions, make a point to obtain the necessary information from people belonging to different social groups.

Domains to Pay Attention To

Certain areas of policy are more likely to contain or result in bias than others. In this section, we highlight some of the policy areas that can be biased and orient you to specific policies that should be carefully reviewed for potential bias or differential impact. You'll notice that a number of these domains have been used in examples in previous sections.

DRESS CODE

These policies often target the attire, hairstyles, and other dimensions of the appearance of individuals who are more likely to be members of marginalized social groups. Furthermore, expecting new employees to acquire the proper clothing can impose a burden on lower-income individuals. Dress code policies are also especially likely to employ unclear language (e.g., "business casual," "suitable clothing," "pants in workplace-appropriate materials").

Dress code policies should be thoroughly thought through. Are these guidelines truly necessary in today's world or are they an artifact of an earlier time? Are they enforced equally across individuals or do they disproportionately affect certain kinds of people? Once common standards are agreed to, dress code policies should be written very explicitly and avoid opaque language. If specific kinds of uniforms are required, you might consider enacting programs that will help employees purchase their first uniform.

SALARIES AND BENEFITS

It is well-documented that women and people of color are paid less for equal work in the United States today. Like many forms of bias, this discrepancy usually is not due to malice on the part of the individual(s) who set salary. Instead, research has shown that members of marginalized groups tend to negotiate salary less aggressively, which appears to be due at least in part to them not wanting to press any buttons before even beginning their work. The same effect carries forward into their work, where members of marginalized groups are less likely to ask for bonuses or salary raises or, when they do, do not ask for as much money as white, heterosexual, cis-gender men. Thus, even if all employees start making the same amount of money for the same function, wage discrepancies can grow over time.

One upstream cause of this issue is that the existing system usually puts the onus on the employee to negotiate salaries, raises, and bonuses. A less common approach, though one we recommend, is indexing wages to objective indicators of individual or company-wide performance. One strong policy is considering one employee's bonus or raise negotiation as representing a negotiation for all the individuals with the same job title (e.g., if one administrative assistant successfully argues for a \$2500 holiday bonus, all administrative assistants, or even all employees at the same level in the company hierarchy, should be given the same bonus). There are still many things you can do as a company to incentivize better work among individual employees, such as promising employees a certain cut of the sales of a new product that they develop.

In addition to negotiations over salaries, negotiations over benefits can similarly disadvantage employees from marginalized backgrounds. Similar policies can be enacted here with the same effect. Another issue when it comes to benefits, though, is parental leave. Allow all new parents to take a certain number of days of parental leave if they wish. Pair this policy with a curbed cut policy; allow all employees some flexibility (if possible) in where and when they work. Everyone will benefit, but a group that will benefit greatly is new parents. Look for other places in the list

of benefits offered to employees to check where you might make objective determinations about the benefits employees enjoy (e.g., index moving expenses to miles traveled).

These policies are not intended as an attempt to change your workplace into a socialist utopia: instead, they are specifically targeted at resolving the kinds of discrepancies that tend to lead to people of color, women, and other members of marginalized social groups being compensated less for equal work.

ADVANCEMENT, EVALUATION, AND TERMINATION

It stands to reason that the same factors that can lead to differences in salaries, bonuses, and raises also factor into how employees are evaluated and accordingly recommended for advancement or termination. All too often, evaluations are to a large degree influenced by the interpersonal chemistry an employee has with their supervisor. That feeling is especially likely to occur between individuals who are similar to each other through a process that psychologists call homophily (literally, love of the same). That unacknowledged closeness can lead to an employee being thought of first when a promotion is available or being given the benefit of the doubt when engaging in questionable behavior.

The first and most straightforward thing that can be done to reduce biases here is to implement evaluation criteria that are more objectively and concretely tied to job skills to more accurately recognize the quality of work an employee is doing. Similarly, objective criteria should be developed to both determine grounds for dismissal and identify individuals who should be interviewed for a promotion. A somewhat less obvious but highly effective policy is creating a mentoring program in which every employee is mentored by someone higher up in the organization. This is a classic curb cut policy that helps everyone by building professional networks and promoting more communication across an organization while also reducing the discrepancy between who is offered mentoring when no formal mentoring program exists due to homophily. Thus, the goal is not to discourage close, personal relationships. In reality, the goal is quite the opposite: rather than only making those opportunities for connection available to a select few, these policies are designed to help foster those kinds of connections among everyone.

HOLIDAYS AND VACATION

As noted earlier, many companies allow employees to have the day off on federal holidays, though some of these holidays have religious associations (e.g., Christmas) and some are much more personally meaningful to people raised in American culture (e.g., Thanksgiving). Some employees would probably be happy to work these days, and are instead disappointed to have to work on days like Yom Kippur, Ramadan, the Independence Day of their home nation, etc.

This is another prime area to apply a curb cut policy, since increasing flexibility in terms of vacation also helps families with children who have break from school at particular times, people who must unexpectedly take vacation due to a family emergency, etc.

One of the most straightforward ways to address this issue is by eliminating observation of the eleven federal holidays and making these days “floating” holidays on top of employees’ existing vacation (e.g., an employee with three weeks paid vacation per year would instead receive 26 days but with no designated holidays off). This policy doesn’t necessarily work in all cases because of rules surrounding federal holidays, but even if the office must be closed

on a given holiday, many employees have functions that will allow them to work from home or in some other capacity. Another option involves recognizing more than just the eleven federally designated holidays, such as giving a paid holiday for a few major non-Christian holidays and allowing employees to request particular days as holidays. These kinds of changes will make the workplace more welcoming to everyone, but particularly those who are not Christian or not raised in American culture.

You may also want to think about these issues when determining leave policies. It is common for companies to not have set policies for extended leave, instead handling those requests on a case-by-case basis. This represents a prime area where bias can enter the system. Make a point to set specific policies regarding who is eligible for leave, for how long, what the terms of such a leave of absence are, etc.

RECRUITMENT

Of course, sometimes the problem when it comes to diversity is getting the right people in the room in the first place. Job opportunities are often spread through professional networks or word of mouth: if you, like most people, have personal and professional networks primarily made up of people who are similar to you, the people you find to interview for the position will also likely be similar to you. Another important insight from the research literature is that even when job opportunities are posted on public job boards, women, people of color, and other members of marginalized groups are less likely to apply if they do not fit all the criteria listed in the job ad (e.g., a white male is more likely to apply to a job that requires 8 years of experience when he has only 5 than members of other groups).

Furthermore, sometimes the requirements themselves rely on figures we know to be biased (e.g., test scores, college GPAs). One of the most notable aspects of a job application that can systematically exclude people of color is the checkbox asking whether they have ever been convicted of a felony. People of color are more likely to be arrested, charged, and convicted of felonies than are white people, even controlling for the rate of the illicit behavior among members of the two groups (that is, it's not simply a reflection of there being more criminal behavior among people of color).

Many of the solutions to problems in recruitment are relatively straightforward. First, all jobs should be posted publicly. In some cases, you may consider doing targeted recruitment by, for example, reaching out to relevant groups like HBCUs and women in STEM groups. Next, job ads should be rewritten to focus primarily on skills and deemphasize specific requirements (e.g., GPA, years of experience). You always have the option in reviewing resumes to "waive" a years of experience requirement only for exceptional applicants, but by not stating that years of experience requirement in the ad itself, you're increasing the likelihood that those exceptional applicants will be from an underrepresented background. You'll also be helping to eliminate the influence of upstream biases that could adversely affect the qualifications of applicants from marginalized backgrounds. Finally, and most concretely, you should not ask potential applicants about their criminal record. There are many sources online explaining how to navigate the decision to "ban the box"; just google the term and you will find them easily. Fifteen states and D.C. ban the box on all job applications, and 37 states do for public employees. Together, implementing these changes should help diversify your applicant pool.

INTERVIEWING

Even once you've successfully recruited a diverse pool of applicants, further biases can be introduced when it comes to who is invited to interview and the interview itself. Many biases can

affect how we read resumes, and the challenge of doing so in an unbiased way is fueled by upstream biases that affect what is on the page, including college name, GPA, and previous job experiences. Then, in the interview room, we are often trained to look for a “spark” or a connection with an applicant and their potential cultural fit, though we know from research that we are more likely to positively rate people who look like us in terms of these characteristics. One solution some companies have implemented is “unbiased” hiring tests to gauge employee skills, though in practice many of these tests act as poll tax policies either because the tests themselves are biased (like, say, the SAT) or the human reviewers introduce bias by relying more or less on the test results based on their existing impression of a candidate.

Again, some of the solutions here are relatively straightforward, if somewhat more abstract. First, hiring committees should slightly change their way of thinking from gauging how well an employee will fit in with the existing culture to considering what an employee will be able to contribute to the existing culture. Similarly, members of the committee should recognize the barriers that many applicants of color and other applicants from marginalized backgrounds face that result in the numbers and job titles on their resume: they may be just as outstanding as a white applicant with higher numbers and more impressive names. These changes in mindset can help make focal the value diverse candidates could bring to an organization. Though hiring tests are not advisable, standardized sets of questions to ask interviewees have been found to eliminate some biases by providing applicants the same standard against which to demonstrate their merits. Together, these changes can help to ensure that the diverse pool of applicants obtained through the improved recruitment process make it to the interview room and into the organization.

COMPLAINTS AND RETALIATION

Even in the most inclusive workplace, bias incidents can occur. In some organizations, there is no recourse available to employees. In others, there is a system for reporting these incidents, but there is little or no follow up. In some, voicing concerns or experiences of bias can lead to retaliatory measures that can cause the person raising the concern to be reprimanded. Organizations that implement bias reporting systems that do not involve follow-up or result in the person reporting the incident being retaliated against can help explain why bias reporting systems currently have a negative effect on organizational diversity.

Your organization should seek to be a different type: one where incidents of bias or harassment can be reported through a straightforward system, where there is follow through after a report is filed, where the perpetrator is held accountable for their actions, and where no retaliatory action is taken toward the person who filed the report. Often retaliation stems from the perpetrator feeling like they’re being called a bad person because of a behavior they engaged in: when your organizational culture supports the idea that bias is inevitable, but our behavior is controllable, this should become a less salient concern, helping to prevent defensiveness when bias is expressed. It is also vital that the people who handle the incident reports are trusted by employees: the best way to enhance trust is to show you are really “walking the walk” and following through on any incident reports that are filed. This is another area that will benefit from having clear, objective disciplinary policies so people do not feel as though they are being treated unfairly.

DRUG TESTING AND OTHER DISCIPLINARY POLICIES

Some disciplinary policies fail to pass the “bigot test” and can easily be enforced differentially across employees from different backgrounds. Drug testing is a prime example: are drug tests in your organization given to all employees at predetermined (or random) times, or are they given only when someone suspects a coworker might test positive? If the latter, people of color are disproportionately likely to be recommended for these tests, mirroring the social phenomenon whereby people of color are much more likely to be caught and charged with drug offenses than white people, even if white people engage in the behavior at the same rate. This same principle applies to disciplinary policy more broadly. Just as people of color (particularly black people) are likely to receive longer and more punitive prison sentences than white people, employees of color are likely to receive stronger disciplinary sanctions when there is not a clear, objective standard for punishment based on their actions.

The single best thing your organization can do to prevent this issue is having clear, objective disciplinary policy. Disciplinary policy should be clear enough to be able to determine a relatively specific punishment based only on surface level aspects of the case. Ideally, the policy should be made available to employees so there is complete transparency about how certain behaviors lead to certain punishments. You also want punishments to focus on restoration and rehabilitation rather than punishment: How do you heal the harm that was done and how will you prevent this employee from engaging in similar behavior in the future? You want the perpetrator to be able to learn from the experience so they can do better in the future.

TAKEAWAYS FROM THIS SECTION

When conducting your assessment of your current policies, you now have a better idea of the areas you’ll want to pay particular attention to where bias may be lurking. Hopefully you also understand some of the background and rationale for changing these policies to be more inclusive.

Prompts for Writing Policy

To this point, this tool has focused on helping you identify potentially biased policies and practices and made recommendations for how to improve them. But how do you actually go about ensuring that a new policy you're writing is inclusive? This last section of this tool provides three specific recommendations go over as you write a new policy. These checks will help to ensure your new policy passes the tests laid out above.

#1 Start with the "why" before describing the "what"

- Make sure the content of the policy is tightly connected to the overarching goal(s).
- Clearly state these goals at the outset of the policy and make explicit how the policy relates to reinforcing those goals.
- Ensure that it's clear to a reader where a policy is coming from and what purpose it serves.
- Many existing policies include sections that could be labeled "Policy" and "Procedure." Add another section at the beginning that could be labeled "Rationale" or "Background."

#2 Use clear, explicit language and define things concretely

- Avoid jargon, idioms, euphemisms, or industry insider terms.
- Write for your audience; in many situations, you'll want to write for a 9th/10th grade reading level (consider the person in the organization with the least reading ability).
- Define terms for the reader as needed.
- If you use acronyms, make sure the definition is very clear to the reader and restate what the acronym stands for if it occurs on multiple pages.
- Use transparent, objective descriptions of relevant situations or concepts.
- Be direct and concise.
- Ask others to read over the policy and see if it makes sense to them.

#3 Explain potential consequences clearly but without embellishment

- Clearly state the potential consequences of violating the policy, including what factors or variables will influence these consequences.
- Write about these consequences in a clear, direct way, but do not embellish the descriptions or use them as threats. Writing "potential consequences include termination" is preferable to writing "***if you violate this policy, you will face serious consequences, up to and including termination.***" The latter phrasing is unnecessarily embellished and complex, not to mention that fear tactics have been shown time and time again to be ineffective.
- If possible, provide more information about how specific features of an infraction could lead to different levels of punishment.

#4 Check the policy against the tests provided above

- Review the questions from the section above to determine whether the policy under consideration “passes” these tests.
- Obtain additional perspectives whenever possible to help ensure you’re seeing the policy from all angles.

TAKEAWAYS FROM THIS SECTION

Given all that you have learned through this document, writing inclusive, unbiased policy itself should be relatively straightforward. You need only bear a few key principles in mind and rely on this tool as needed to free policies from bias. As you read, a key element of this work is gaining input and perspective from many different kinds of people. We tend to make inaccurate assumptions when considering the needs of others, so it’s best to hear from others directly across all stages of the policy review process. Talk to them about what’s not working with existing policy, ask them to advise on updates to policies, and get their input when writing new policy.

Working on policy can feel insignificant when faced with the challenge of making your organization more inclusive, but remember that your policies are the foundation your organization is built upon. You must have a strong, well-built foundation in order to be able to do any of the other work you may think is needed to make your organization more diverse, welcoming, and inclusive.

Climate Survey Tools

What is your organization's culture really like? A culture assessment can help you understand its current state. Culture assessments can reveal incongruities between an organization's ideal culture and its real culture. They help identify any barriers to inclusion and opportunities to improve the culture. You can use this information to develop a strategic approach toward goals related to belonging, inclusion and diversity. To chart the effectiveness of your work to strengthen the culture, we recommend distributing the survey again in subsequent years.

OVERVIEW

This section provides an overview of Inclusivity's climate assessment tools and practices and serves as a guide to the specific measurements.

There are numerous goals to establishing a climate assessment:

- Collecting quantitative baseline data
- Identifying areas of need for the organization
- Analyzing how actions taken to improve climate actually affect members of the organization

Usually organizations use the term "climate assessment" broadly, referring to a general assessment of organizational operations and well-being. These assessments tend to focus on topics like effective leadership, communication, and employee satisfaction. Inclusivity's assessment, in contrast, focuses on climate as it pertains to inclusion, diversity, and equity (IDE). The topics covered in broader surveys are certainly relevant to climate around IDE as well, though the kinds of questions posed here differ from those broader surveys given our particular focus.

There are any number of topics you may choose to measure that would give us additional insight into an organization's climate. Accordingly, there are numerous sections below showing the different categories of questions that may be posed to members of the organization.

The survey should be administered every one to two years to track changes over time. In addition to calculating means/medians of each question, the data should be examined for different social groups. As is noted multiple places in the document, some of these questions are really only meaningful insofar as differences in responses are explored by social background. For example, though it may be interesting to see how much employees feel like they need to change their behavior to fit in, the purpose of this question is really to help identify those groups whose members have to change their behavior the most to fit in (e.g., Black people, trans people).

The questions included in future iterations of the survey can grow and change, but the tool should maintain similar/identical questions as much as possible so leaders can make apples-to-apples comparisons across years. New questions that members of the organization write should

follow the same basic question-writing principles as we have employed here (for example, most questions using the same basic response scale). Though the survey tool may seem like a cold, scientific instrument in pursuit of IDE goals, it is an excellent way to solicit perceptions from a wide swatch of the organization and clearly identify and define areas for improvement.

DEMOGRAPHICS

First and foremost, we need a way to disaggregate data based on certain characteristics. One potential problem with using a very detailed demographic survey is reduced or nonexistent anonymity; for example, if a company only has a handful of black employees, the demographic survey will almost identify them individually. Therefore, different versions are intended for organizations of different sizes. In addition to the questions the follow, use one of three versions of demographic surveys starting on page 29 based on your organization's size.

CLIMATE ASSESSMENT TEMPLATE

For questions without specified answer options, use these response options: "Not at all," "A little," "Somewhat," "Quite a bit," and "A great deal."

Health, Well-being, Retention, and Belonging

In addition to providing a sense of how employees are doing overall, these items about health, well-being, and belonging will help reveal differences between groups. Members of marginalized social groups often have worse health, lower well-being, and a lower sense of belonging than their non-marginalized peers, and these items will help to quantify these relationships.

1. Describe your physical health in general over the last two months.
[From 1– poor to 7– excellent]
2. Describe your mental health in general over the last two months.
[From 1– poor to 7– excellent]
3. How strongly have you felt the following emotions over the last two months?
 - Stressed
 - Depressed
 - Lonely
 - [could add Overwhelmed, Sad, Worthless, etc. as descriptors]
4. Do you feel you belong...
 - As a member of your team?
 - At the organization in general?
 - In this industry in general?
 - [change or add to these levels as appropriate]
5. Do you feel valued...
 - As a member of your team?
 - At the organization in general?

- In this industry in general?
 - [change or add to these levels as appropriate]
6. Do you feel comfortable sharing your honest thoughts and opinions with your coworkers?
 7. When you do share your thoughts and opinions with your coworkers, do you feel like they are respected and valued?
 8. Do you feel comfortable sharing your honest thoughts and opinions with your supervisor?
 9. When you do share your thoughts and opinions with your supervisor, do you feel like they are respected and valued?
 10. Do you feel challenged and engaged in your current position?
 11. Have you considered leaving the organization in the last year?
 - If yes, what prompted you to consider leaving?

Hostile / Intimidating Behavior and Bias/Harassment

It's vital to better understand the nature of intergroup relations within a given setting. For example, is it the case that members of marginalized groups are frequently facing explicit bias and harassment, or do issues seem to stem instead from social distance or more subtle or ambiguous behaviors? Diagnosing the problem comes with implications for the solutions we design. Furthermore, it's important to be direct and honest when it comes to problems that may exist currently.

Note: Your organization should provide definitions of these terms if such definitions are specified in the employee handbook, etc. If not, use our descriptions below

The following questions ask about a variety of behaviors that can negatively impact organizational climate. Please refer to these definitions:

- **Hostile/intimidating behavior** is defined as unwelcome behavior pervasive or severe to the extent that it makes the conditions for work inhospitable and impairs another person's ability to carry out his/her responsibilities (University of Wisconsin - Madison)
 - **Bias/harassment** is the unfair, unwelcome, or prejudicial treatment of people and groups based on characteristics such as race, gender, age, sexual orientation, etc. (American Psychological Association, Equal Employment Opportunity Commission)
12. Have you personally experienced hostile and/or intimidating behavior in this organization?
 - If yes, who was the perpetrator? Peer, boss/manager, direct report, client, other
 13. Have you personally experienced bias and/or harassment in this organization?
 - If yes, who was the perpetrator? Peer, boss/manager, direct report, client, other If you responded "yes" to either of the questions above, feel free to say a little more about the experience, if you would like to. Please avoid identifying any individuals, including yourself.
 14. If you reported an incident of bias/harassment, how confident are you that the report would be taken seriously?
 15. If you reported an incident of bias/harassment, how confident are you that the report would be handled appropriately?

WORKING CONDITIONS

This segment of the survey will ask many of the questions common to broader organizational climate assessments. In addition to having some utility to better understand the climate as a whole, again the most meaningful insights here will come from comparing members of marginalized groups to their non-marginalized peers. In what ways do these individuals feel different levels of support or different expectations from their supervisors or other business leaders?

16. How comfortable do you feel discussing your personal life at work?
17. How comfortable do you feel starting a conversation about topics related to diversity or inclusion at work?
18. Is this organization a place where you feel comfortable being your authentic self?
19. To what extent do you change your behavior in the workplace to better fit in?

PERCEPTIONS OF CLIMATE

We generally maintain that the people who know the most about the climate in a given setting are the people who spend a large proportion of their time in those places, not the consultants who swoop in and have chatted with just a couple people. Asking employees for their perceptions of the existing climate, then, is an extremely valuable way to gauge the reality “on the ground” without having to sit down to interview everyone. These impressions are often quite consistent and accurate, and any differences along group lines are revealing themselves, pointing to potential gaps in understanding or perceptions between individuals.

20. Is this an organization that welcomes and embraces diversity?
21. Based on what you have seen and/or experienced, to what extent do you think this organization provides a welcoming environment for...
 - Women
 - LGBTQIA+ individuals
 - Members of racial/ethnic minority groups
 - Immigrants
 - Religious minorities (e.g., Jews, Muslims)
 - People with physical or mental disabilities
 - Straight, cisgender, white men
 - [insert other groups of interest here]
22. Are you treated in a welcoming, inclusive way at work?
23. Think about the people who work at this organization.
 - About what percent of employees actively try to make the organization more welcoming and inclusive?
 - About what percent of employees make the organization less welcoming and inclusive through their words and/or actions?

24. Please indicate how strongly you disagree or agree with the following statements:
- This organization is doing a great job when it comes to diversity and inclusion.
 - Diversity and inclusion are strategic priorities at this organization.
 - The organization's leaders have clearly communicated their commitment to diversity and inclusion.
 - My supervisor has clearly communication their commitment to diversity and inclusion.

PERSONAL VALUES

In addition to learning about what employees think about their coworkers' and their organization's commitment to diversity and inclusion, it's also important to get a sense of their personal beliefs and behaviors. Before (or absent) training, results on these measures will help to identify barriers and opportunities that exist within a given organization: for example, are they an organization where few are inclusive, where inclusion is the norm, or where inclusive attitudes outpace inclusive behaviors? These responses are also interesting to compare to those about coworkers and the organization broadly, potentially revealing pluralistic ignorance. Administered after training, these items will help us assess whether we've fostered change among individual employees when it comes to inclusive behaviors and attitudes.

25. How accurately do each of the following statements describe you?
- I attempt to act in nonprejudiced ways because it is personally important to me.
 - Being nonprejudiced is important to my self-concept.
26. In general, how comfortable are you interacting with people who are different from you?
27. Should this organization invest more time and resources in making the company more diverse, inclusive, and equitable? (Rate from No, definitely not to Yes, definitely)
28. Do you believe that prejudice and discrimination are among the most pressing issues to address in our society? (Rate from "No, definitely not" to "Yes, definitely")
29. In the last two months, how often have you engaged in the following behaviors? (options are "I haven't done this in the last two months," "Seldom (about once per month)," "Occasionally (about twice per month)," "Often (about once per week)," and "Very often (multiple times per week)")
- Gotten to know someone who is different from you
 - Talked to someone with a different background about their experiences
 - Worked with an individual who is different from you on a project
 - Made an effort to learn what life is like for people who are different from you (e.g., reading a book, watching a talk)
30. Do you have any other thoughts you would like to share on the topic of these questions?

Comprehensive Demographic Survey

1. What is your age?
2. How do you define your race / ethnicity? Check all that apply [Could separate options more]
 - a. White / Caucasian
 - b. Hispanic / Latino/a/x / Chicano/a/x / Central or South American
 - c. Black / African / African American
 - d. Asian / Asian American
 - e. Native American / American Indian / First Nation / Alaska Native
 - f. Arab / Middle Eastern / North African
 - g. Pacific Islander / Native Hawaiian / Filipino/a/x
 - h. None of these. Specify:
3. How do you define your gender identity?
 - a. Man
 - b. Woman
 - c. Intersex
 - d. Non-binary, genderqueer, or genderfluid
 - e. None of these. Specify:
4. Do you identify as trans?
 - a. Yes
 - b. No
5. How do you define your sexual orientation? Check all that apply
 - a. Straight / heterosexual
 - b. Gay / lesbian / homosexual
 - c. Queer
 - d. Bisexual
 - e. Pansexual
 - f. Asexual or Ace Spectrum
 - g. None of these. Specify:
6. What is the highest level of education you have completed?
 - a. Intermediate school
 - b. High school or GED
 - c. Some college
 - d. Associate's degree
 - e. Bachelor's degree
 - f. Professional degree (e.g., Master's, PhD, JD, MD)

7. What is the highest level of education completed by either of your parents (or those who raised you)?
 - a. Intermediate school
 - b. High school or GED
 - c. Some college
 - d. Associate's degree
 - e. Bachelor's degree
 - f. Professional degree (e.g., Master's, PhD, JD, MD)
8. How would you describe your socioeconomic status growing up?
 - a. Poor
 - b. Working class
 - c. Lower middle class
 - d. Middle class
 - e. Upper middle class
 - f. Upper class
9. How would you describe your socioeconomic status now?
 - a. Poor
 - b. Working class
 - c. Lower middle class
 - d. Middle class
 - e. Upper middle class
 - f. Upper class
10. What is your religious affiliation? Check all that apply
 - a. Christian – Protestant (e.g., Lutheran, Methodist, Baptist)
 - b. Christian – Catholic
 - c. Mormon
 - d. Jehovah's Witness
 - e. Jewish
 - f. Muslim
 - g. Hindu
 - h. Buddhist
 - i. Christian – Orthodox
 - j. Agnostic / Atheist
 - k. Spiritual but not religious
 - l. None of these. Specify:

11. How would you define your political views on social issues? 1, very liberal, to 5, very conservative
12. How would you define your political views on economic issues? 1, very liberal, to 5, very conservative
13. Which of these terms best represents your political identity?
 - a. Leftist / Progressive / Democratic Socialist
 - b. Liberal
 - c. Democrat
 - d. Moderate or Independent
 - e. Republican
 - f. Conservative
 - g. Libertarian
 - h. Tea Party / Far Right
 - i. None of these. Specify:
14. Do you have a disability?
 - a. Yes
 - b. No
15. [If yes] How would you describe your disability?
 - a. Mobility or other physical impairment
 - b. Sensory impairment (e.g., vision, hearing)
 - c. Mental health challenges (e.g., depression, PTSD)
 - d. Learning (e.g., ADHD, dyslexia)
 - e. Developmental
 - f. Chronic illness
 - g. None of these. Specify:
16. Do you have a mental illness?
 - a. Yes
 - b. No
17. In what country did you spend most of your childhood? [provide drop-down country list]

Condensed Demographics Survey

1. What generation would you consider yourself to be a member of?
 - a. Gen Z (approx. 1998 – 2012, ages up to 23)
 - b. Millennials (approx. 1981 – 1997, ages 24 – 40)
 - c. Gen X (approx. 1965 – 1980, ages 41 – 56)
 - d. Baby Boomers (approx. 1946 – 1964, ages 57 – 75)
 - e. Silent Generation (approx. 1928 – 1945, ages 75+)
2. Do you identify as a member of a racial/ethnic minority group or person of color?
 - a. Yes, I identify as a member of a racial/ethnic minority group or person of color
 - b. No, I identify as white
3. How do you define your gender?
 - a. Man
 - b. Woman
 - c. Intersex, non-binary, genderqueer, genderfluid, or another identity not shown here
4. Do you identify as a member of the LGBTQIA+ community?
 - a. Yes
 - b. No
5. What is the highest level of education completed by either of your parents (or those who raised you)?
 - a. Intermediate school
 - b. High school or GED
 - c. Some college
 - d. Associate's degree
 - e. Bachelor's degree
 - f. Professional degree (e.g., Master's, PhD, JD, MD)
6. Do you identify with one of the following religions? Jewish, Muslim, Hindu, or Buddhist
 - a. Yes
 - b. No
7. How would you define your political views in general? 1, very liberal, to 5, very conservative
8. Do you identify as a person with a disability or a mental illness?
 - a. Yes
 - b. No
9. Did you spend most of your childhood in the United States?
 - a. Yes
 - b. No

Demographics – Two-Question Version

We are aware that, given the small size of this organization, sharing your opinion along with detailed demographic information presents an issue to anonymity. For this reason, we have chosen to ask only two questions about social identities: these questions will allow us to assess whether and how experiences in the department differ between groups without arousing anonymity concerns.

To answer these questions, please keep this definition in mind:

Marginalized/Stigmatized Groups: These groups are frequent targets of prejudice or discrimination in our society in general or your industry in particular.

Examples include but are not limited to racial and ethnic minorities, members of the LGBTQIA+ community, religious minorities (Jewish, Muslim, Hindu, Buddhist), individuals with disabilities, and individuals who come from families that are low in socioeconomic status.

1. Do you currently identify as a man, or do you believe you are perceived to be a man by others?
 - a. Yes
 - b. No

2. Do you belong to one of more Marginalized/Stigmatized Groups? Please make your best judgment when responding to this question.
 - a. Yes
 - b. No

Email Template – Climate Assessment

COMMUNICATION	Message to All Employees about Climate Assessment
CC	
FROM	Organization’s leader
SUBJECT	We want your feedback about the culture!
PROPOSED SEND DATE	

As we continue to shape our inclusion, diversity and equity (IDE) strategy, gathering input from all employees is critical. This is an opportunity for you to anonymously share your thoughts and experiences in relation to belonging, diversity, and equity at our organization.

Click here to take an anonymous employee survey, which should take you no more than 15 minutes to complete. The survey begins on [date] and closes on [date].

The survey is 100% confidential. Your identity is anonymous and won’t be shared. As we strive to better understand our current culture, your survey responses will help illuminate strengths and opportunities. The data will inform our strategic approach to IDE, as well as provide a baseline from which we can measure our progress.

Thank you in advance for giving your time and sharing your honest answers.

■ Unit 2

Inclusive Hiring Training



INCLUSIVE HIRING PARTICIPANT GUIDE

Improve Business Performance through Diversity and Inclusion

Inclusivity's mission is to help organizations build inclusive cultures. This is not just the right thing to do: it will also help your company perform at its best!



Boost Productivity and Innovation

Companies that are more inclusive are more profitable. According to a 2020 McKinsey & Company report, companies in the top quartile of ethnic diversity are 36% more likely to outperform their peers. On the flip side, those in the lowest quartile were 27% more likely to underperform. According to a 2017 Deloitte analysis, companies with inclusive policies generate up to 30% higher revenue per employee. Diverse perspectives ultimately enhance problem-solving and generate new ideas. For instance, Deloitte found that diversity of thinking styles among a company's employees has been found to increase innovation by up to 20% and reduce risks by 30%.

Drive Engagement

When employees feel valued and empowered, they are more likely to engage and contribute more fully. Research from Gallup notes that team members with higher levels of engagement produce substantially better outcomes, increasing profitability by 21%. And there is evidence that inclusion is closely linked to employee engagement, notes McKinsey.

Attract and Retain Talent

An inclusive culture can help an organization both attract and keep employees. The talent pool itself is rapidly diversifying: 44.2% of millennials are racial/ethnic minorities, and the current K-12 population in the United States is 53.8% non-white. Applicants are increasingly seeking out inclusive companies. For example, Paradigm reported that 54% of employees would consider leaving their company if it failed to speak out about social justice.

Improve Competitiveness

Finally, an inclusive culture will help you improve your internal processes and your competitiveness. Working toward inclusion often involves implementing communication and other management strategies that have additional positive effects within the company that extend beyond inclusion. Looking externally, McKinsey reports that there is a widening profitability gap between inclusion "winners" and "laggards": being proactive about making your company more inclusive will help guarantee you'll be one of those "winners."

Working toward building a more inclusive workplace isn't just the right thing to do, it's also vital to having a thriving, successful business. To unlock the potential for successful diverse teams, inclusive leadership is crucial. Leaders need to commit to lead every day by example to ensure that all team members feel they are treated respectfully and fairly, are valued, and belong.

■ Exercise Attracting Candidates

In this activity, you will be working to fill a fictional job for a sales representative position. In this first phase, you will review the proposed job post and make a decision about which version of the “Preferred Qualifications” and “Required Documents” is preferable.

Job Posting | **Sales Representative** Zantech Solutions

Zantech Solutions is seeking a motivated individual to join our team in the role of Sales Representative. The Sales Representative will assist Zantech in satisfying its mission to connect customers with innovative medical products and technologies. The position primarily involves generating leads, attracting and maintaining relationships with retailers, meeting and exceeding customer needs and expectations, executing call plans, and establishing new marketing strategies to distinguish Zantech and attract new customers. We look forward to reading your application!

Version A

Preferred Qualifications

- BA/BS in business, the medical sciences, or a related field
- At least 3 years of cumulative experience in similar roles
- Strong customer service and sales acumen
- Strong written and verbal communication skills
- History of working well independently and as a team member

Required Documents

- Resume
- Cover letter
- Supplemental application form
- Personal information for criminal background check
- Marketing portfolio
- Personal social media links

Version B

Preferred Qualifications

- Experience working in customer service and/or the medical sciences
- Flexible and creative working style
- Experience in Microsoft software, including SharePoint and Teams
- Strong written and verbal communication skills
- Ability to work independently and as a strong team member

Required Documents

- Resume
- Cover letter
- Supplemental application form
- Upload samples of any work you'd like considered

Exercise Screening Resumes

At this point, you have collected numerous resumes for the sales representative job. Here, we've provided four of these resumes. Zantech uses an online form for resume submission, which makes it a bit easier to compare the resumes since all contain the same kind of information. In addition to providing educational information and work history, candidates were asked to describe their qualifications for the position. Zantech has removed applicant names to help eliminate one source of bias. Review the four resumes, then indicate which two of these candidates you would like to bring in for an interview. You're welcome to jot down any notes about what informed your decision.

Applicant 1

Education

Spelman College, Class of 2021 **Major:** Communications **GPA:** 3.82

Professional Experience

- Retail Associate at GAP, Summer 2018: Assisted customers, maintained store cleanliness and appearance, restocked clothing, and performed some schedule management.
- Internship at Black Girls Code, Summer 2019: Performed community outreach as well as providing supporting for Black girls completing computer science summer programs.
- Director of Alpha Kappa Alpha Greek Society, Spelman College Chapter, Summer 2020: Serving as director of my society required planning events, fundraising, coordinating with alumni, and some house management tasks.

Please speak to your qualifications for this position

I have some customer service and sales experience through my role at GAP and have very good interpersonal skills. I am a highly motivated person who can bring endless enthusiasm and willingness to learn to this role.

Notes

Applicant 2

Education

Wayne County Community College **Major:** NA (Gen Eds) **GPA:** 3.41
University of MI – Dearborn, 2021 **Major:** Business **GPA:** 2.98

Professional Experience

- Shift Manager, McDonalds, Aug 2017- Jul 2019: Started as an entry-level worker, which involved extensive customer service. Then, moved to maintaining employee schedules and overseeing work after a year on the job. Led the team.
- Marketing and Operations Manager, Lalos Tire Shop, Jul 2019 – present: Ran the office side of the business: created and implemented marketing campaigns, responded to customer inquiries, and helped develop sales strategies. Also helped organize the business's tax and financial documents and created a filing system.

Please speak to your qualifications for this position

Much of my past work overlaps with responsibilities of this position. I think those same skills will apply here. Thank you for considering my application.

Applicant 3

Education

Brown University, Class of 2020 **Major:** Biology **GPA:** 3.20

Professional Experience

- Camp Counselor, Camp Menogyn, Summer 2017 and 2018: Performed outdoor education and oversaw groups of teenage campers. Helped to develop campers as people.
- Research Assistant, Brown University, Summer 2019: Worked in my thesis advisor's lab, examining effects of hormone imbalances in amphibians. Performed various research tasks and learned data analysis.

Please speak to your qualifications for this position

I am intimately familiar with the work of Zantech and look forward to contributing to this company in any way that I can. I have a strong history of being adaptable in new situations and that's the same mentality I could bring to my work at Zantech.

Applicant 4

Education

University of WI – Madison, 2021 **Major:** Global Health **GPA:** 3.85

Professional Experience

- Personal nanny, Madison, WI, Summer 2018 and 2019: Looked after both an elementary-aged child and a toddler during the day over two consecutive summers. Planned activities for them and looked after them.
- Front desk worker, Union South Campus Center, 2019-20 and 2020-21 school year: Student work study that involved answering questions for the general public (both in-person and via email), directing phone calls, and explaining campus services.
- Sales and marketing internship, Epic Systems, Summer 2020: Participated in summer internship program that involved learning and performing many sales and marketing functions for a large healthcare software company, including lead generation, targeted marketing, and maintaining client relationships.

Please speak to your qualifications for this position

I have a good deal of experience with the tasks required for this position, mainly through my internship with Epic Systems. I will bring a positive attitude to the job.

After reviewing the applications presented, which two applicants would you like to interview?

FIRST CHOICE: Applicant ____ **SECOND CHOICE:** Applicant ____

Once you've selected your applicants and taken any relevant notes, stop and wait for further instructions before proceeding in the workbook.

Notes

Rubric Selecting Candidates

To help you make your decision, we have included the following rubric. For each of the terms below, indicate the degree to which the applicant exhibited that quality from a scale of 1, not at all, to 5, a great deal (numbers between integer values are acceptable). Then, provide at least a reason or two to justify your rating. At the end, add up all your scores to calculate your cumulative score for each candidate.

Applicant _____

	Score	Reasoning
SKILLS		
FIT		
CAPABILITY		
PERSONALITY		

FINAL SCORE _____/20

Applicant _____

	Score	Reasoning
SKILLS		
FIT		
CAPABILITY		
PERSONALITY		

FINAL SCORE _____/20

You have already rated each of the candidates and explained your rating. Now, working with members of your pair/small group, come to a decision about which applicant to hire. You do not need to choose based on the cumulative rating you calculated.



Unit 2B

Facilitator Guide: Inclusive Hiring Exercises

Step 1: Attracting candidates (5 minutes)

- Point participants to the fictional job description in the participant guide.
- Explain that their task here is to decide which of the two versions of the job description is preferable to them. (At this point you don't want to give any debrief info).
- Once everyone has decided, just ask the participants to keep the criteria from the version they chose in mind through the rest of the exercise.

Step 2: Screening (7.5 minutes)

- Explain to participants that they will be shown four of the resumes that Zantech received for this particular role. They look so similar because Zantech uses a standardized online form for application submission.
- Point out that Zantech recognizes that seeing applicant names can introduce bias, so they have removed the names.
- Their task is to read through the resumes and decide **which two applicants** to invite in for an interview.
- Explain that they can add some notes about their decision if they'd like, but they don't have to.
- Ask them **not** to proceed to the next page of the workbook once they select their two applicants.

Step 3: Interviewing (10 minutes)

- Because you can't actually interview these candidates, tell participants they'll be reading over some interview notes from the interviews with the applicants they selected. All interview notes come from the same interviewer.
- Break the group into smaller groups based on which two applicants they chose to interview. The combinations are:
 - 1 and 2
 - 1 and 3
 - 1 and 4
 - 2 and 3
 - 2 and 4
 - 3 and 4

- For each combination of applicants, ask participants to raise their hands if that reflects their selection.
- Group those that have raised their hands together. If five or more people selected a given combination (e.g., five people choose 1 and 2 as their top applicants), break them down into smaller groups.
- Give one member of each group the interview notes (see following pages) for that applicant combination.
- Explain that one member of the group should read interview notes for each applicant (might make sense for them to switch speakers for the two applicants). The other members of the group should jot down some notes in the note section.
- Explain that once the interview notes have been read, participants should individually complete the rubric in the participant guide; they will rank each of the two applicants on a 1-5 scale on each of four characteristics and explain their reasoning briefly. They should then add up the total scores for each.
- At this point let them read the interview notes and start working on their rubrics.

Step 4: Selecting (7.5 minutes)

- Once most people are done with their rubrics, tell participants that they will then work with their small groups to decide which of the two candidates they interviewed they should hire.
- Each group has to come to a **consensus** about who to hire.
- Once each group has made a decision, they can have a short break and come back to the main room.

Debriefing in the Large Group (30 minutes)

- Begin by asking participants how they felt during the activity. What made it similar to the kind of hiring they are doing right now, and what made it different?
- Next, ask each group to tell you which applicant they selected.
 - » Note the counts on a whiteboard/flipchart.
 - » Ask people to share the kinds of factors that affected their decisions. Jot down key terms or words next to the applicant number as well.
- Ask participants to raise their hand to indicate which of the four candidates they rated the most highly individually (that is, before they came back together with their group). Note these numbers on the whiteboard/flipchart as well.
- Show the slides that describe each of the four applicants, noting how we tailored the resumes and interview notes to demonstrate likeability and qualifications. Ask participants to share how likeability and qualifications affected their decisions
- Return to the numbers you wrote down earlier reflecting their selections. Ask them what they notice about the numbers and the words/phrases
- If the rate of selecting the black applicants was higher for individuals but lower for groups, point out how voices that might be open to going with a different kind of candidate can easily be drowned out when entering a small group discussion.

- » Groups are much more likely to opt for a “risky” candidate who is likeable but unqualified (“they can be trained”) than a candidate who is not as likeable but highly qualified (“I just don’t think they’ll fit in”).
- If the rate of selecting the black applicants was higher for groups but lower for individuals, point out how they were able to overcome individual biases when they worked together. What kinds of factors came up in their small group discussions that were helpful?
- Walk through the slides that show how biases can be introduced in attracting candidates, screening applications, interviewing, and selecting a candidate as well as how to mitigate these biases
- Ask for other questions/feedback.
 - » Know that participants often bring up the interview notes as the cause for any biases they expressed. You can point out that the interviewer is flawed, but many of the things they say would be interpreted differently in light of the information they now know thanks to your debrief. It may even be worthwhile to walk through how these biases showed up in the interview notes. So the interviewer isn’t a deviant, the interviewer is a normal person with unmanaged bias.
- Ask participants to discuss a couple concrete actions they can take to combat bias at these levels.

Interview Notes Applicants 1 & 2

Below, you will see the notes from one member of the interview panel for each of the candidates you selected to interview. As you'll notice reading, there were a couple questions asked of each candidate. The interviewer also notes other salient aspects of each candidate. After reading these notes, complete the rubric in your workbook for each candidate.

Applicant 1

- ▶ Kept and held our attention throughout the interview.
- ▶ Strong interpersonal skills and came across as likable and very confident.
- ▶ Interested in the position because they want to get more experience in a traditional corporate setting and are interested in our work.
- ▶ One challenge this job could present? Having to be extremely patient with people who might be a few steps behind them: describes self as an efficient worker and go-getter.
- ▶ Spoke at length about Greek society at Spelman, which seems to have had a big impact on them.

PERSONAL NOTES

Though likable, I'm not sure that this candidate is a great fit for the company. Their enthusiasm came across as a little bombastic. They didn't expand much on their skills for the job aside from what appeared in the application.

Applicant 2

- ▶ Came across as shy and uncomfortable in the interview, sometimes struggling to maintain eye contact.
- ▶ Despite interpersonal weakness, did speak at length about experience at both jobs listed on resume, which they worked during college to support themselves.
- ▶ Started at community college to save some money before moving to a four-year degree school.
- ▶ Interested in the position because it extends prior work experience.
- ▶ One challenge this job could present? Having to move so far from home to accept the position, as they are very close with family.

PERSONAL NOTES

This applicant did not come across as particularly enthusiastic about the job, though their experience with the relevant skills is notable. I don't see them fitting in super well at our company: they're just not the kind of person I could imagine getting a beer with after work.

Interview Notes Applicants 1 & 3

Below, you will see the notes from one member of the interview panel for each of the candidates you selected to interview. As you'll notice reading, there were a couple questions asked of each candidate. The interviewer also notes other salient aspects of each candidate. After reading these notes, complete the rubric in your workbook for each candidate.

Applicant 1

- ▶ Kept and held our attention throughout the interview.
- ▶ Strong interpersonal skills and came across as likable and very confident.
- ▶ Interested in the position because they want to get more experience in a traditional corporate setting and are interested in our work.
- ▶ One challenge this job could present? Having to be extremely patient with people who might be a few steps behind them: describes self as an efficient worker and go-getter.
- ▶ Spoke at length about Greek society at Spelman, which seems to have had a big impact on them.

PERSONAL NOTES

Though likable, I'm not sure that this candidate is a great fit for the company. Their enthusiasm came across as a little bombastic. They didn't expand much on their skills for the job aside from what appeared in the application.

Applicant 3

- ▶ Came across as extremely likable and personable in the interview. I found it difficult to hold myself to the interview questions instead of discussing some of the interesting personal experiences brought up (e.g., during the year absent from the resume they were backpacking in Europe).
- ▶ Wowed us right away with knowledge of some of the work currently going on at Zantech (though it probably doesn't hurt that their uncle directs one of these projects).
- ▶ Interested in the job because they just really want to be part of Zantech.
- ▶ One challenge this job could present? Not getting distracted by any of the other interesting work that's going on here.

PERSONAL NOTES

This candidate would be a great fit here, and their enthusiasm is genuine and palpable. I have no doubt they'd do a great job in this position even without the "traditional" experience some others have.

Interview Notes Applicants 1 & 4

Below, you will see the notes from one member of the interview panel for each of the candidates you selected to interview. As you'll notice reading, there were a couple questions asked of each candidate. The interviewer also notes other salient aspects of each candidate. After reading these notes, complete the rubric in your workbook for each candidate.

Applicant 1

- ▶ Kept and held our attention throughout the interview.
- ▶ Strong interpersonal skills and came across as likable and very confident.
- ▶ Interested in the position because they want to get more experience in a traditional corporate setting and are interested in our work.
- ▶ One challenge this job could present? Having to be extremely patient with people who might be a few steps behind them: describes themselves as an efficient worker and go-getter.
- ▶ Spoke at length about Greek society at Spelman, which seems to have had a big impact on them.

PERSONAL NOTES

Though likable, I'm not sure that this candidate is a great fit for the company. Their enthusiasm came across as a little bombastic. They didn't expand much on their skills for the job aside from what appeared in the application.

Applicant 4

- ▶ Solid interview on the whole, did a good job explaining their qualifications for the role.
- ▶ Interested in the position because the post aligns well with their skills and they're interested in the work that we're doing.
- ▶ One challenge this job could present? Couldn't really think of any challenges at first, but when pressed explained that working collaboratively could be a challenge since they can be a perfectionist and likes things to be done a certain way.
- ▶ Talked a good deal about internship with Epic Systems. Though Epic sells medical software, the knowledge of the medical sciences showed and the skills overlap with the position we're hiring for.

PERSONAL NOTES

This candidate's qualifications speak for themselves, though I wasn't really wowed. I think they'll do just fine in the role and fit in our existing culture, but they didn't come across as particularly gregarious or enthusiastic.

■ Interview Notes Applicants 2 & 3

Below, you will see the notes from one member of the interview panel for each of the candidates you selected to interview. As you'll notice reading, there were a couple questions asked of each candidate. The interviewer also notes other salient aspects of each candidate. After reading these notes, complete the rubric in your workbook for each candidate.

Applicant 2

- ▶ Came across as shy and uncomfortable in the interview, sometimes struggling to maintain eye contact.
- ▶ Despite interpersonal weakness, did speak at length about experience at both jobs listed on resume, which they worked during college to support themselves.
- ▶ Started at community college to save some money before moving to a four-year degree school.
- ▶ Interested in the position because it extends prior work experience.
- ▶ One challenge this job could present? Having to move so far from home to accept the position, as they are very close with family.

PERSONAL NOTES

This applicant did not come across as particularly enthusiastic about the job, though their experience with the relevant skills is notable. I don't see them fitting in super well at our company: they're just not the kind of person I could imagine getting a beer with after work.

Applicant 3

- ▶ Came across as extremely likable and personable in the interview. I found it difficult to hold myself to the interview questions instead of discussing some of the interesting personal experiences brought up (e.g., during the year absent from the resume they were backpacking in Europe).
- ▶ Wowed us right away with knowledge of some of the work currently going on at Zantech (though it probably doesn't hurt that their uncle directs one of these projects).
- ▶ Interested in the job because they just really want to be part of Zantech.
- ▶ One challenge this job could present? Not getting distracted by any of the other interesting work that's going on here.

PERSONAL NOTES

This candidate would be a great fit here, and their enthusiasm is genuine and palpable. I have no doubt they'd do a great job in this position even without the "traditional" experience some others have.

Interview Notes Applicants 2 & 4

Below, you will see the notes from one member of the interview panel for each of the candidates you selected to interview. As you'll notice reading, there were a couple questions asked of each candidate. The interviewer also notes other salient aspects of each candidate. After reading these notes, complete the rubric in your workbook for each candidate.

Applicant 2

- ▶ Came across as shy and uncomfortable in the interview, sometimes struggling to maintain eye contact.
- ▶ Despite interpersonal weakness, did speak at length about experience at both jobs listed on resume, which they worked during college to support themselves.
- ▶ Started at community college to save some money before moving to a four-year degree school.
- ▶ Interested in the position because it extends prior work experience.
- ▶ One challenge this job could present? Having to move so far from home to accept the position, as they are very close with family.

PERSONAL NOTES

This applicant did not come across as particularly enthusiastic about the job, though their experience with the relevant skills is notable. I don't see them fitting in super well at our company: they're just not the kind of person I could imagine getting a beer with after work.

Applicant 4

- ▶ Solid interview on the whole, did a good job explaining their qualifications for the role.
- ▶ Interested in the position because the post aligns well with their skills and they're interested in the work that we're doing.
- ▶ One challenge this job could present? Couldn't really think of any challenges at first, but when pressed explained that working collaboratively could be a challenge since they can be a perfectionist and likes things to be done a certain way.
- ▶ Talked a good deal about internship with Epic Systems. Though Epic sells medical software, the knowledge of the medical sciences showed and the skills overlap with the position we're hiring for.

PERSONAL NOTES

This candidate's qualifications speak for themselves, though I wasn't really wowed. I think they'll do just fine in the role and fit in our existing culture, but they didn't come across as particularly gregarious or enthusiastic.

■ Interview Notes Applicants 3 & 4

Below, you will see the notes from one member of the interview panel for each of the candidates you selected to interview. As you'll notice reading, there were a couple questions asked of each candidate. The interviewer also notes other salient aspects of each candidate. After reading these notes, complete the rubric in your workbook for each candidate.

Applicant 3

- ▶ Came across as extremely likable and personable in the interview. I found it difficult to hold myself to the interview questions instead of discussing some of the interesting personal experiences brought up (e.g., during the year absent from the resume they were backpacking in Europe).
- ▶ Wowed us right away with knowledge of some of the work currently going on at Zantech (though it probably doesn't hurt that their uncle directs one of these projects).
- ▶ Interested in the job because they just really want to be part of Zantech.
- ▶ One challenge this job could present? Not getting distracted by any of the other interesting work that's going on here.

PERSONAL NOTES

This candidate would be a great fit here, and their enthusiasm is genuine and palpable. I have no doubt they'd do a great job in this position even without the "traditional" experience some others have.

Applicant 4

- ▶ Solid interview on the whole, did a good job explaining their qualifications for the role.
- ▶ Interested in the position because the post aligns well with their skills and they're interested in the work that we're doing.
- ▶ One challenge this job could present? Couldn't really think of any challenges at first, but when pressed explained that working collaboratively could be a challenge since they can be a perfectionist and likes things to be done a certain way.
- ▶ Talked a good deal about internship with Epic Systems. Though Epic sells medical software, the knowledge of the medical sciences showed and the skills overlap with the position we're hiring for.

PERSONAL NOTES

This candidate's qualifications speak for themselves, though I wasn't really wowed. I think they'll do just fine in the role and fit in our existing culture, but they didn't come across as particularly gregarious or enthusiastic.

Inclusive Hiring Facilitator Debrief

Applicants



Applicant 1

Brianna Rivers

Likeability: 2nd
Qualifications: 3rd



Applicant 2

Isaiah Jefferson

Likeability: 4th
Qualifications: 1st



Applicant 3

Cole Patterson

Likeability: 1st
Qualifications: 4th



Applicant 4

Brooke Kowalski

Likeability: 3rd
Qualifications: 2nd

Attracting Candidates

Biases that can occur when attracting candidates:

- Posting job opportunities on a limited number of websites / publications.
 - E.g., people with access to career counseling services are much more likely to have a LinkedIn. Post widely!
- Attending career fairs only at predominantly white colleges and universities.
 - If you're marketing primarily to well-represented applicants, you're not likely to be able to recruit underrepresented applicants.
- Recruiting primarily based on personal connections.
 - We are more likely to be connected to people who are similar to us, so recruiting based on personal connections is unlikely to make the company more diverse than it already is
- Asking questions or requesting materials that are unrelated to the job
 - Some hiring tests include irrelevant information (e.g., a spelling or civics test), and some applications ask for materials that probably aren't needed.
- Asking applicants to indicate whether they have ever been convicted of a felony.
 - More than a dozen states and DC have "banned the box," prohibiting employers from asking about this. Most employers eliminate all applications with a "yes" answer to this question. Because PoCs are more likely to have felony convictions for minor offenses (most notably drug possession), they are disadvantaged by this policy (especially since crimes like drug possession are just as prevalent among whites, just much less prosecuted)
- Emphasizing experience rather than skills in a job description.
 - Women, PoCs, and other marginalized folks are less likely to apply for a job if they don't "tick all the boxes" compared to white men. Besides, skills are better indicators of job fit than years of experience in most situations.
- Requiring particular degrees without clear justification.
 - Asking for a BA/BS or even an MA/MS is often included as a default, but is this level of education truly needed for the job?

Managing these biases:

- Ask yourself, “Who aren’t we reaching with our current methods?” then create new recruitment plans. This will likely involve going to the places where your preferred applicants are and changing policies about where, when, and how jobs are posted.
- Write job descriptions from scratch instead of using a boilerplate or default template.
- Post jobs on numerous sites.
- Require applicants recruited through personal connections to undergo the same application process as others and have resumes reviewed by a third party.
- Write job ads to focus on the required skills as opposed to requisite experience.
- Think critically about both what qualifications and applicant information are necessary in the application. Avoid requirements and questions that are not deemed necessary.

Questions for consideration:

- Who are you doing a good job reaching with your current methods? Who is left out?
- Who writes and posts about open positions? How does this process need to change?

Screening Resumés

Biases that can occur when screening applications:

- Applicants from underrepresented groups are less likely to pass traditional screening measures because, due to inequality in our society, they often have: less “impressive” academic pedigree, lower high school or college GPAs, lower test scores or performance on hiring tests, and higher likelihood of criminal or disciplinary history
 - This should need little explanation, but should be straightforward if needed
- They are also less likely to stand out as interesting or unique due to often having fewer extracurricular activities and more “traditional” job history rather than internships
 - Point out that this isn’t necessarily the case, but it is common since minority applicants often face more financial hardship, again due to inequality in society
- Research shows that the presence of applicant names alone can lead to biases.
 - Black applicants are less likely to receive callbacks and women applicants to STEM positions are less likely to be hired and are offered lower starting salaries

Managing these biases:

- We rely more on biases when we lack clear guides: create a guide that specifies (in detail) what to look for on applicants’ resumes.
- In this guide, deemphasize variables that are not actually good indicators of success (even if they feel like they are), such as academic pedigree.
- Furthermore, explicitly value “traditional” lower-wage jobs: internships may be more interesting to read about, but may be less useful experience than these other jobs.
- Eliminate “cutoffs” for scores/GPAs or eliminate review of these statistics entirely.
- Remove applicant name when reviewing resumes.
- Include cover letters and open-ended questions that help you get to know a candidate.

Questions for consideration:

- What are the current criteria used to sort applications? Which of these must change?
- What logistics need to be worked out to implement these screening changes?

Interviewing

Biases that can occur in interviewing:

- Not sticking to a list of planned questions, instead having an open-ended interview.
 - It'll be easier for us to make conversation with people who are similar to us, not to mention that psychology shows that we also like people who are similar to use more (homophily)
- Not making it clear to applicants how they should dress for the interview.
 - Think again about access to career counseling. Minority applicants are more likely to lack information about expectations in the interview room and probably haven't received as much training / practice.
- Fixating on issues related to self-presentation that are unrelated to job qualifications.
 - E.g., perceiving an applicant with, say, many piercings, long nails, "natural" hair, or visible tattoos as less qualified. Most of these presentation issues either have no job relevance or could be resolved when extending an offer.
- Asking banned interview questions (directly or indirectly).
 - Most people know these questions are banned, but sometimes ask them in subtle ways to obtain the same information (e.g., "Tell us about your partner")
- Relying too much on "gut" instinct when scoring interviews.
 - This is bias central! We already know that this is a prime situation for unmanaged biases to occur

Managing these biases:

- Write and agree on a specific list of questions for each position and stick to them. Ensure that the questions are relevant to job skills and help you get to know applicants' personalities. Avoid complex or irrelevant questions, as well as idle chit-chat.
- Remind interviewers of banned questions and hold each other accountable.
- Make explicitly clear to candidates how they should dress ("business casual" is not explicitly clear). If possible, choose clothing that is not too specialized or expensive (e.g., a button-up shirt and tie with slacks rather than a three-piece suit).
- Create a rubric for scoring applicants on dimensions like fit, qualifications, etc., and ask interviewers to provide specific justification for their responses. This will help support objective discussion of the candidates.

Questions for consideration:

- Who will decide what questions will be asked in the interview for a given position?
- What should a rubric measure, and how should scores be tabulated and discussed?

Bias in Selecting Candidates

Biases that can occur in selection:

- Relying on “gut instinct” judgments of fit and preferability as a team member.
 - As we’ve now mentioned multiple times, any time someone says something about their “gut,” alarm bells should go off. We know that when we rely on our gut we will make more exclusionary judgments!
- Undervaluing applicant uniqueness or ability to bring in a new perspective.
 - Remember, it might make sense to give applicants that can contribute a new perspective some “points” for that ability!
- Shifting how to weigh different criteria to justify a personal opinion about an applicant.
 - E.g., saying someone’s low score on a skills assessment isn’t really a big deal. This is a classic move that gets used to justify eliminating underrepresented applicants.
- Offering underrepresented candidates less competitive salaries and benefits packages.
 - This is commonplace and will contribute to perpetuating an exclusive culture within your organization
 - Furthermore, marginalized employees are far less likely to pursue aggressive salary negotiations, which will put them at a disadvantage in the organization from day 1. This is actually a bigger factor than unequal offers.
- Failing to meet potential employees’ needs when extending an offer letter.
 - Sometimes applicants don’t accept offers! One common reason is feeling like their needs have not been listened to. This might include accommodations for remote work, flexible hours, and leave policies.

Managing these biases:

- Calculate scores for applicants based on interview rubric and other statistics (e.g., skills assessment, years relevant experience). Use and respect these scores in discussion.
- Require hiring panel to justify opinions using concrete, specific examples.
- Include a field on the interview rubric that indicates the degree to which an applicant would bring a new perspective or bring this up when discussing applicants.
- Set criteria for pay and do not allow candidates to negotiate salary.
- Include accommodation policies in the offer letter (e.g., work from home, leave) or include a general statement noting you are open to discussing accommodations.
- Never make decisions independently: always involve a team and, when possible, have different team members be responsible for different aspects of the hiring process.

Questions for consideration:

- How can you discuss “fit” in a way that is objective and based on specific observations?
- How should hiring committees/teams be created and managed?
- How will you structure the discussion about applicants and make an ultimate selection?



Inclusive Hiring Participant Debrief

Applicants



Applicant 1

Brianna Rivers

Likeability: 2nd
Qualifications: 3rd



Applicant 2

Isaiah Jefferson

Likeability: 4th
Qualifications: 1st



Applicant 3

Cole Patterson

Likeability: 1st
Qualifications: 4th



Applicant 4

Brooke Kowalski

Likeability: 3rd
Qualifications: 2nd

Attracting Candidates

Biases that can occur when attracting candidates:

- Posting job opportunities on a limited number of websites / publications.
- Attending career fairs only at predominantly white colleges and universities.
- Recruiting primarily based on personal connections.
- Asking questions or requesting materials that are unrelated to the job.
- Asking applicants if they have ever been convicted of a felony.
- Emphasizing experience rather than skills in a job description.
- Requiring specific degrees without clear justification.

To manage these biases:

- Ask yourself, “Who aren’t we reaching with our current methods?” and then create new recruitment plans. This will likely involve going to the places where your preferred applicants are and changing policies about where, when, and how jobs are posted.
- Write job descriptions from scratch instead of using a boilerplate template.
- Post jobs on a wide range of sites.
- Require applicants recruited through personal connections to go through the same application process as others and have resumes reviewed by a third party.
- Write job ads to focus on the required skills as opposed to required experience.
- Think critically about both what qualifications and applicant information are necessary in the application. Avoid requirements and questions that are not deemed necessary.

Questions for consideration:

- Who are you doing a good job reaching with your current methods? Who is left out?
- Who writes and posts about open positions? How does this process need to change?

Screening Resumés

Biases that can occur when screening applications:

- Applicants from underrepresented groups are less likely to pass traditional screening measures because, due to inequality in our society, they often have:
 - Less impressive academic pedigree
 - Lower high school and/or college GPAs
 - Lower test scores or performance on hiring tests
 - Higher likelihood of criminal or disciplinary history
- Applicants from underrepresented groups are also less likely to stand out as interesting or unique due to often having fewer extracurricular activities and more “traditional” job history rather than internships
- The presence of applicant names can lead to biases.

To manage these biases:

- We rely more on biases when we lack clear guides; create a guide that details what to look for on applicants’ resumes.
- In this guide, deemphasize variables that are not actually good indicators of success, such as academic pedigree.
- Furthermore, explicitly value “traditional” lower-wage jobs. Internships may be more interesting to read about, but that doesn’t mean that they’re better at preparing applicants to work for you
- Eliminate “cutoffs” for scores/GPAs or eliminate review of these statistics entirely.
- Remove applicant names when reviewing resumes.
- Request cover letters and ask open-ended questions that help you get to know a candidate.

Questions for consideration:

- What are the current criteria used to sort applications? Which of these need to change?
- What logistics need to be worked out to implement these screening changes?

Interviewing

Biases that can occur in interviewing:

- Drifting from a list of planned questions into an open-ended interview format.
- Not making it clear to applicants how they should dress for the interview.
- Fixating on issues related to self-presentation that are unrelated to job qualifications.
- Asking banned interview questions whether directly or indirectly.
- Relying too much on gut instinct when scoring interviews.

To manage these biases:

- Write and agree on a specific list of questions for each position and stick to them. Ensure that the questions are relevant to job skills and help you get to know applicants’ personalities. Avoid complex and/or irrelevant questions, as well as idle chit-chat.
- Remind interviewers of banned questions and hold them accountable.

- Be clear when you inform candidates about how they should dress, avoiding slang terms like “business casual.” Make this dress code as accessible as possible (e.g., allowing applicants to wear a dress shirt and tie with slacks instead of a full suit)
- Create a rubric for scoring applicants on dimensions like fit, qualifications, etc., and ask interviewers to provide specific justification for their responses. This will help support objective discussion of the candidates.

Questions for consideration:

- Who will decide what questions will be asked in the interview for a given position?
- What should a rubric measure, and how should scores be tabulated and discussed?

Selecting Candidates

Biases that can occur in selection:

- Relying on gut instinct judgments of fit and preferability as a team member.
- Undervaluing applicant uniqueness or ability to bring in a new perspective.
- Shifting the criteria to justify a personal opinion about an applicant.
- Offering underrepresented candidates less competitive salaries and benefits packages.
- Failing to meet potential employees’ needs when extending an offer letter.

To manage these biases:

- Calculate scores for applicants based on an interview rubric and other statistics (e.g., skills assessment, years of relevant experience). Use and respect these scores in discussion.
- Require the hiring panel to justify opinions using concrete, specific examples.
- Include a field on the interview rubric that indicates the degree to which an applicant would bring a new perspective, or bring this up when discussing applicants.
- Set criteria for pay and do not allow candidates to negotiate salary.
- Include accommodation policies in the offer letter (e.g., work from home, leave) or include a general statement noting that you are open to discussing accommodations.
- Never make decisions independently; always involve a team and, when possible, have different team members be responsible for different aspects of the hiring process.

Questions for consideration:

- How can you discuss “fit” in a way that is objective and based on specific observations?
- How should hiring committees/teams be created and managed?
- How will you structure the discussion about applicants and make an ultimate selection?



■ Unit 3

ONBOARDING: The Team Connection



Team Connection Session 1



Welcome and Introductions

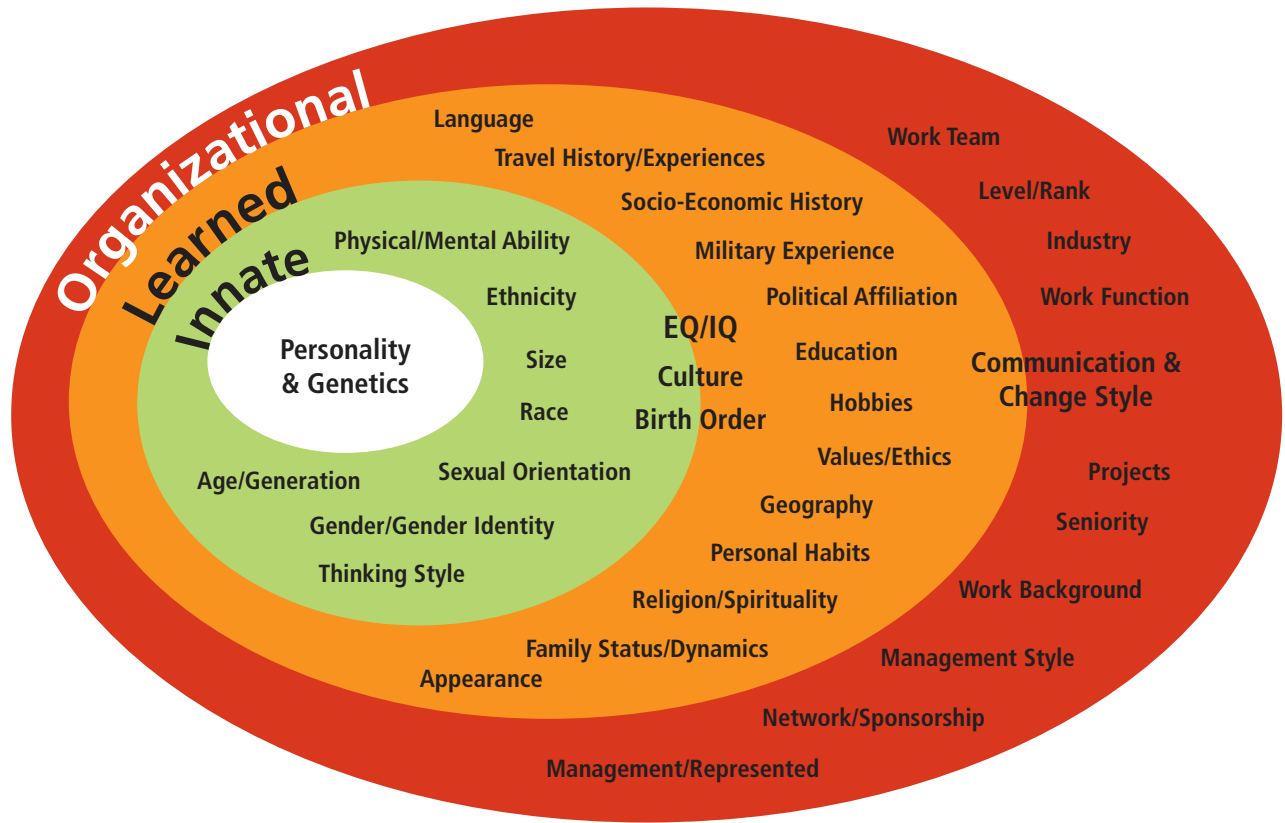
OBJECTIVES

- Create a strong sense of connection and inclusion among all team members.
- Develop a clear understanding of who each of your team members are.
- Use the Elements of Individuality model to understand that each person defines themselves differently.
- Understand what Social Distance is and how the Social Distance Shadow can create exclusion, disengagement, and reduced performance and productivity, if not managed effectively.
- To reduce the Social Distance Shadow, learn about your team member's Elements of Individuality, and behave in ways that reinforce the value of the Elements for each team member.

PARTICIPATION GUIDELINES

- Participate fully
- Be open and honest
- Listen actively and ask questions
- Respect others and suspend judgment
- Minimize distractions
- **Keep the conversation confidential**

Elements of Individuality™ Model



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Notes

Exercise Exploring Our Individuality

Defining Ourselves

The model on the previous page is a guide to help you think about what defines you as a person and identify your most important attributes. Please select the three most important Elements of Individuality that you believe your co-workers need to know about you. Please take a few minutes to record your thoughts in the space below.

	Element of Individuality	How I Define Myself	Why My Co-Workers Need to Know This About Me
EXAMPLE	Gender	<i>Female</i>	<i>I am frequently the only woman in meetings, which causes me to not compete for airspace very well.</i>
	Family Status	<i>Single</i>	<i>I am very close to my immediate family, but most of my supervisors assume that because I am single, I can work all hours of the day and night.</i>
	Geography	<i>Global Citizen</i>	<i>I would love to have a global assignment someday. I have traveled all over the globe and would welcome the opportunity to live and work abroad.</i>

	Element of Individuality	How I Define Myself	Why My Co-Workers Need to Know This About Me
1.	_____	_____ _____ _____	
2.	_____	_____ _____ _____	
3.	_____	_____ _____ _____	

Sharing With Others

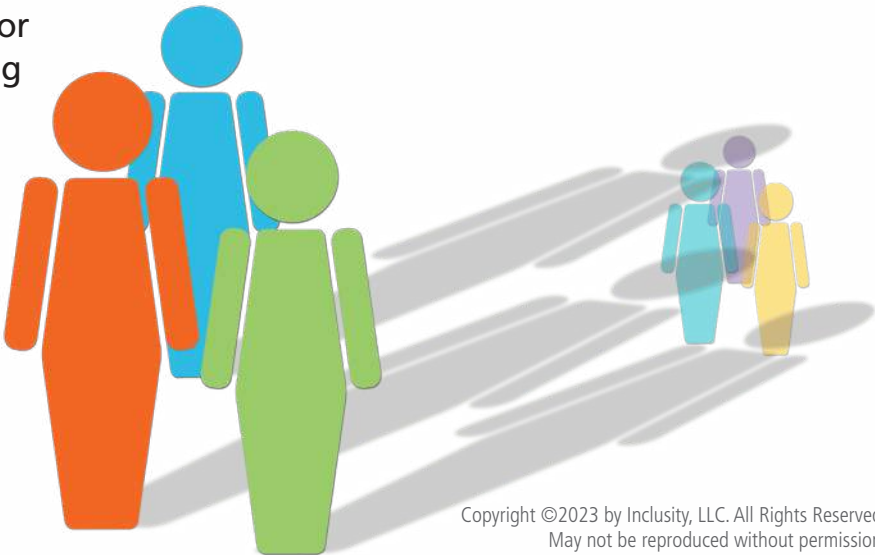
In small groups, share the Elements of Individuality you selected and why you think the other group members need to know this about you. Allow everyone an equal opportunity to speak and share.

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Social Distance Shadow™ Model

Social distance is the extent to which individuals or groups are removed from or excluded from participating in each other's lives.

Social distance casts a Shadow that leads to disengagement and reduced productivity.



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The Social Distance Shadow is created by:

- Unmanaged biases and stereotypes
- Disrespectful behavior
- Expectations that diverse people should assimilate into the cultural norms of the in-norm group

The Social Distance Shadow leads to:

- Reduced communication and feedback (in both in- and out-of-norm groups)
- Decreased willingness to speak up and/or seek help

The Social Distance Shadow results in:

- Decreased coaching, mentoring and sponsorship
- Reduced ability to effectively perform tasks
- Some people feel excluded, discounted and devalued, while others feel overworked and may eventually burn out.

Notes

Provide an example of when you experienced the Social Distance Shadow. How did it affect your ability to fully contribute?

■ Removing the Shadow



Eliminating Social Distance

When we recognize and value Elements of Individuality, we eliminate the Shadow and enable all employees to:

- Be themselves
- Fully utilize their strengths and skills
- Build emotional intelligence by being authentic and vulnerable
- Develop their weaknesses and skill gaps

Eliminating the Shadow increases engagement, resulting in maximum productivity and success!

The Social Distance Shadow model shows us that we must **intentionally include** or we will **unintentionally exclude**.

Notes



Transform Your Culture. **Create Inclusion.**[™]



Inclusivity Facilitator Guide



TEAM CONNECTION

CREATE INCLUSIVE TEAM ENVIRONMENTS TO MAXIMIZE PERFORMANCE



Welcome and Introductions

TIME: Up to 20 minutes



Be Mindful

- Be mindful of your **time**.
- Keep it loose. A relaxed atmosphere is good but be careful not to forget the business at hand.

Set-Up

Circle seating style if in person

Facilitator Objectives

- Introduce ourselves to the participants
- Establish workshop's overarching objectives
- Establish open, warm, safe environment for participants
- Establish participant guidelines
- Build connections with participants

Helpful Tips

- Stay loose. Don't be overly formal.
- Thank participants for attending.
- Block out your timing for this section prior to the workshop.
- Lay out in your mind where you should be in this section in 10 minutes, 20 minutes, 40 minutes, etc.
- The first 30 minutes are critical for bonding with participants.
- Stay tuned in to your own emotions and manage them.
- If applicable, work with your co-facilitator(s) on which of you will do what during the workshop.

Materials

VIRTUAL

- Computer
- PowerPoint
- Participant Guide

IN-PERSON

(in addition to virtual)

- Pens
- Markers
- Post-It chart paper
- Projector
- Projector screen

Set Up - Welcome & Introductions

- Introduce yourself and share objectives

NOTE

Facilitator may consider letting the team do a quick introduction (30 seconds or less), including things like name, role and a non-work achievement they're proud of. Keep in mind time restriction and or group tenure.



OBJECTIVES

- Create a strong sense of connection and inclusion among all team members.
- Develop a clear understanding of who each of your team members are.
- Use the Elements of Individuality model to understand that each person defines themselves differently.
- Understand what Social Distance is and how the Social Distance Shadow can create exclusion, disengagement, and reduced performance and productivity, if not managed effectively.
- To reduce the Social Distance Shadow, learn about your team member's Elements of Individuality, and behave in ways that reinforce the value of the Elements for each team member.

Set Up - Participation Guidelines

- Refer participants to their participant guide so they can follow along.
- Walk through Participant Agreements with participants.
- Ask participants if they would like to add anything to the agreements to increase ownership.
- Instruct participants to commit to confidentiality before moving forward.



PARTICIPATION GUIDELINES

- Participate fully
- Be open and honest
- Listen actively and ask questions
- Respect others and suspend judgement
- Minimize distractions
- Keep the conversation confidential

SUGGESTED TRANSITION TO NEXT SECTION

SAY: "Personal connections and being intentionally inclusive as a team have many benefits including building trust. We are going to get started with the personal connections piece by using one of our favorite models here at Inclusion, the Elements of Individuality model."

■ Elements of Individuality

TIME: 40 minutes

Facilitator Objectives

- Continue to establish open, warm safe environment for participants
- Identify commonalities and appreciate differences among team members to build connections

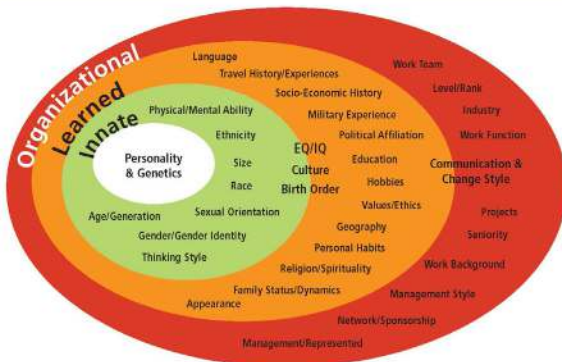
Takeaways

- Participants have a deeper connection with each other.
- So much can be learned through storytelling that is deeper than goals, projects or peer personality assessments.
- This exercise can help build trust and identify commonalities on a team.

Helpful Tips

- Participants may become uncomfortable thinking about their elements because it is personal and not often shared in the workplace.
- Try to keep the group size to eight people or less so that everyone can share together.
- If more than eight, you will have to break the group out into groups of three to four.

Elements of Individuality™ Model



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Notes

Notes

Be Mindful

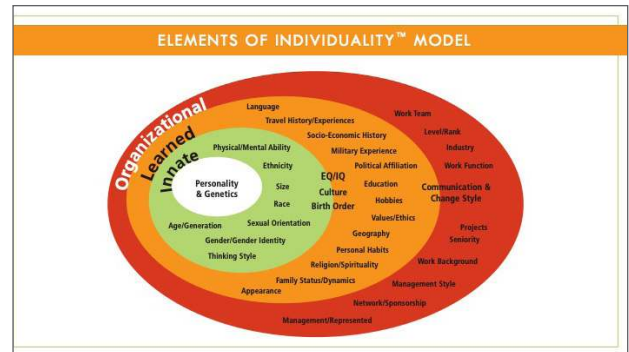
- Be careful not to be overly emotional or intentionally unemotional as you share. *Tap into participants' hearts, but don't make them uncomfortable by sharing at too deep a level.*
- Your sharing is only an example and should take roughly two minutes.

Set Up – The Elements Exercise

EXPLAIN: Model definition

The model is a tool that teams and individuals can use to share information about what defines them and how it influences their behavior and relationship needs at work. The model guides us toward better understanding of each individual team member.

- **Personality & Genetics (White):** These are elements that are within your DNA. They exist before we are born; nonetheless, they impact our lives.
- **Innate (Green):** These are attributes you are born with.
- **Learned (Orange):** These are attributes you acquire through experience or exposure.
- **Organizational (Terracotta):** These are attributes you bring to your profession.
- **Overlaps**
 - » **EQ/IQ** – Emotional Intelligence and intelligence are things we are born with, but they can also be enhanced or decrease through experience or reading.
 - » **Birth Order** – Your birth order may change as your family of origin changes (through divorce/blended families) and it may determine to a great extent how you experience things.
 - » **Communication/Change Style** – This attribute is ever evolving based on your experience and environment.
 - » **Culture** – You may have been born into one culture, but that culture may change over time and with life experiences.



Instructions

- Introduce the exercise with the example in the workbook and explain each area.
- Begin modeling the exercise by sharing one (or more) of your elements. (The example in the workbook may not be your Elements of individuality. Be sure to share your own).
- Ask participants to review the model and select three elements (across any of the circles) that define them the most. As they list the elements in their participant guide, define each element and why it is important for the team to know this information.

Exercise Exploring Our Individuality

Defining Ourselves

The model on the previous page is a guide to help you think about what defines you as a person and identify your most important attributes. Please select the three most important Elements of Individuality that you believe your coworkers need to know about you. Please take a few minutes to record your thoughts in the space below.

Element of Individuality	How I Define Myself	Why My Co-Workers Need to Know This About Me
Gender	Female	I am frequently the only woman in meetings which causes me to not compete for airspace very well.
Family Status	Single	I am very close to my immediate family but most of my supervisors assume that since I am single, I can work all hours of the day and night.
Geography	Global Citizen	I would love to have a Global someday. I have travelled all over the globe and would welcome the opportunity to live and work abroad.

Element of Individuality	How I Define Myself	Why My Co-Workers Need to Know This About Me
1.		
2.		
3.		

Sharing With Others

Next, form groups of three or four people. Share the Elements of Individuality you selected and why you think the other group members need to know this about you. Allow everyone an equal opportunity to speak and share.

Team Connection, Session 1 3

NOTE:

Facilitator can encourage participants to pick in the orange and green sections to go deeper in the discussion but only if the participants are comfortable with that.

NOTE:

Create small groups of 3 to 5 for discussion (if small groups are needed). This discussion can take 15-20 minutes.

EXPLORING OUR INDIVIDUALITY			
Please select the three most important Elements of Individuality that you believe your team members should know about you.			
EXAMPLE	Element of Individuality	How I Define Myself	Why My Co-Workers Need to Know This About Me
	Gender	Female	I am frequently the only woman in meetings which causes me to not compete for airspace very well.
	Family Status	Single	I am very close to my immediate family but most of my supervisors assume that, because I am single, I can work all hours of the day and night.
	Geography	Global Citizen	I would love to have a Global assignment someday. I have traveled all over the globe and would welcome the opportunity to live and work abroad.

- Explain to participants that they will be sharing one element at a time. Each member of the group will share their first Element of Individuality, then their second, then (if time permits) their third.
- Ask participants to please manage their participation so all group members have equal time to share.

Suggested Debrief Questions -The Elements Exercise

- How did that exercise feel?
- What learnings did you take away from the sharing?
- Did you learn something new about your co-worker(s)?

SUGGESTED TRANSITION TO NEXT SECTION

SAY: "Great job everyone. We're off to a great start! We learned a bit more about each other and how our elements of individuality matter in how we show up at work."

SAY: "This model is particularly useful in getting know your teams on a deeper, more personal level and opens the door

for future conversations about our lives both at and outside work."

SAY: "Now let's take a closer look at how understanding individual elements can help us be intentionally inclusive, thus building more trust between team members."

Exercise

- Ask participants to apply the social distance shadow to their experiences in the workplace by completing the exercise.
- Allow participants approximately 5 minutes to reflect and write responses.
- If small groups are needed; Create groups of 3-4 for participants to share their experiences together
- Ask participants to share their experience and how it impacted them.

Suggested Debrief Questions

- How did it feel to share your experiences with the group or with your small group?
- What were some of the common impacts from being in the shadow?

NOTE:

We ask this so that we emphasize how participants felt and to follow up if there's a theme among participants' feelings.

Usually that theme is constructive and makes us not feel good (scared, mad, hurt, etc.)


We want them to keep in mind that we've all had that moment, and it didn't feel great. That should help us build our empathy for anyone who is out of the norm.

That's why it's so important to remove the shadow to help us all be ourselves.

Removing the Shadow

Share the impact of recognizing and valuing the elements of individually as we empathize with others because we've had out of the norm experiences too.

Doing this allows us to intentionally include so we don't unintentionally exclude others.



REMOVING THE SHADOW

When we recognize and value the Elements of Individuality, it allows employees to:

- Be themselves
- Fully utilize their strengths and skills
- Build emotional intelligence by being authentic and vulnerable
- Develop their weaknesses and skill gaps

The Social Distance Shadow model shows us that we must **intentionally include** or we will **unintentionally exclude**.

Provide an example of when you experienced the Social Distance Shadow. How did it affect your ability to fully contribute?

Removing the Shadow

Eliminating Social Distance

When we recognize and value Elements of Individuality, we eliminate the Shadow and enable all employees to:

- Be themselves
- Fully utilize their strengths and skills
- Build emotional intelligence by being authentic and vulnerable
- Develop their weaknesses and skill gaps

Eliminating the Shadow increases engagement, resulting in maximum productivity and success!

The Social Distance Shadow model shows us that we must **intentionally include** or we will **unintentionally exclude**.

Notes _____

Team Connection, Session 1 5

SUGGESTED CLOSING

SAY: “You all did a great job. Sharing our elements of individuality and understanding how exclusion – unintentional or not – can negatively impact teams is critical to having a strong team.”

- Ask participants to share a key learning OR to give a one-word description of their experience of the session
- Thank participants for their engagement and participation.

IF SECOND SESSION IS OR WILL BE SCHEDULED CONTINUE TO...

SAY: “In our next session we will delve into trust and how important it is for strong, high-performing teams. And we’ll talk about stress and its impact on team dynamics.”

SAY: “Connection is key to building a relationship, and trust is the foundation upon which all positive relationships are built.”

- Remind them of the next session date if already scheduled.

NOTES:



Transform Your Culture. **Create Inclusion.**TM

Conscious Inclusion





Welcome

PARTICIPATION GUIDELINES

- Participate fully
- Actively listen and ask questions
- Be open and honest
- Respect others and suspend judgment
- Minimize distractions
- Keep the conversation confidential

INTRODUCTIONS

- Name
- Role
- Years of work experience
- A non-work achievement that you're proud of

OBJECTIVES

- Develop a connection, trust, and inclusion with other participants and facilitator
- Recognize that inclusion and diversity benefit organizations, improving engagement, productivity, and innovation
- Appreciate the uniqueness of individuals and learn how our identities shape our experience
- Understand the scientific research showing how easily biases form and affect behavior
- Explore the differences between bias, stereotypes, and discrimination
- Learn how unintentional exclusion and unregulated bias can reduce organizational productivity and climate
- Recognize what happens to people who are out-of-norm in the organization
- Gain practical tips to increase inclusion

Improve Business Performance through **Diversity and Inclusion**

Inclusivity's mission is to help organizations build inclusive cultures. This is the right thing to do: it will also help your company perform at its best!



Boost Productivity and Innovation

Companies that are more inclusive are more profitable. According to a 2020 McKinsey & Company report, companies in the top quartile of ethnic diversity are 36% more likely to outperform their peers. On the flipside, those in the lowest quartile were 27% more likely to underperform. According to a 2017 Deloitte analysis, companies with inclusive policies generate up to 30% higher revenue per employee. Diverse perspectives ultimately enhance problem-solving and generate new ideas. For instance, Deloitte found that diversity of thinking styles among a company's employees has been found to increase innovation by up to 20% and reduce risks by 30%.

Drive Engagement

When employees feel valued and empowered, they are more likely to engage and contribute more fully. Research from Gallup notes that team members with higher levels of engagement produce substantially better outcomes, increasing profitability by 21%. And there is evidence that inclusion is closely linked to employee engagement, notes McKinsey.

Attract and Retain Talent

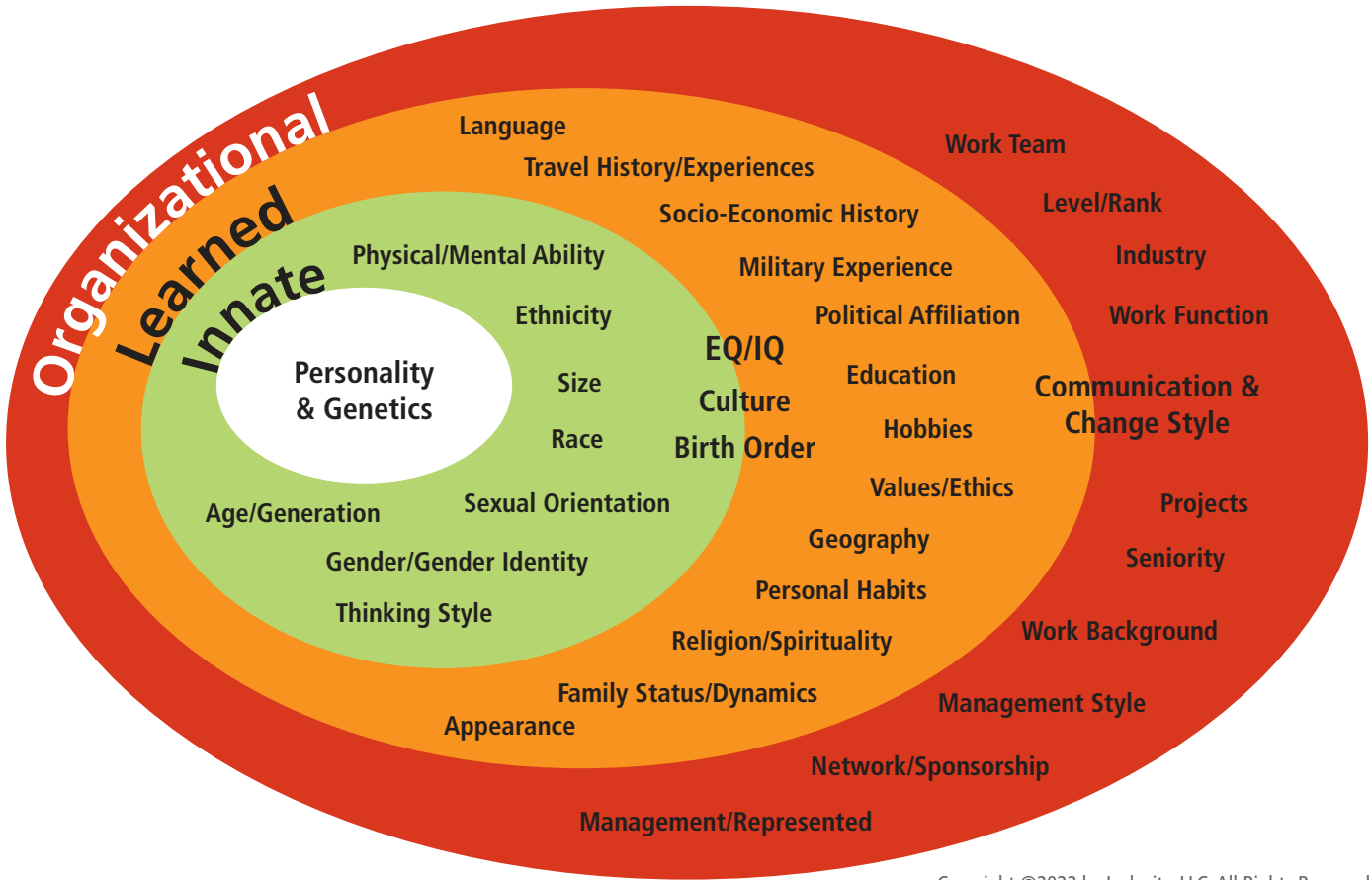
An inclusive culture can help an organization both attract and keep employees. The talent pool itself is rapidly diversifying: 44.2% of millennials are racial/ethnic minorities, and the current K-12 population in the United States is 53.8% non-white. Applicants are increasingly seeking out inclusive companies. For example, Paradigm reported that 54% of employees would consider leaving their company if it failed to speak out about social justice.

Improve Competitiveness

Finally, an inclusive culture will help you improve your internal processes and your competitiveness. Working toward inclusion often involves implementing communication and other management strategies that have additional positive effects within the company that extend beyond inclusion. Looking externally, McKinsey reports that there is a widening profitability gap between inclusion "winners" and "laggards": being proactive about making your company more inclusive will help guarantee you'll be one of those "winners."

Working toward building a more inclusive workplace isn't just the right thing to do, it's also vital to having a thriving, successful business. To unlock the potential for successful diverse teams, inclusive leadership is crucial. Leaders need to commit to lead every day by example to ensure that all team members feel they are treated respectfully and fairly, are valued, and belong.

Elements of Individuality™ Model



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Notes

Exercise Exploring Our Individuality

Defining Ourselves

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1.	_____	_____ _____ _____ _____	
2.	_____	_____ _____ _____ _____	
3.	_____	_____ _____ _____ _____	

Sharing With Others

In small groups, share the Elements of Individuality you selected and why you think the other group members need to know this about you. Allow everyone an equal opportunity to speak and share.

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Understanding Bias, Stereotypes & Discrimination

As the Picture Exercise shows, we easily form biases, which cause us to behave accordingly as well as overlook information. You may feel uncomfortable learning that you have and act upon biases, but research confirms that everyone has biases! Let's explore where biases come from.

Brains Take Shortcuts

We are constantly being bombarded by more information than we could possibly process, so the human brain developed numerous shortcuts to help process it. One of these shortcuts is sorting information into categories, which help us name and make assumptions about things. When you encounter a bird, you can automatically identify it as a bird even if you've never seen that kind of bird before. You'll also likely assume it can fly, chirp, and lay eggs. Categorical thinking is an amazing ability of the brain that helps make our lives easier.

Our brains apply the same process to people. When we encounter a person, our brains unconsciously assign that person characteristics like race, gender, and age (in addition to numerous personality variables). This happens within just a couple hundred milliseconds – literally faster than an eye blink. (Ito & Urland, 2005). One influential study showed that people can reliably make judgments about



gender after being exposed to a face for just 20 milliseconds, a time so short participants didn't even have a conscious experience of seeing the face (Cloutier, Mason, & Macrae, 2005).

Notes

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Everybody Stereotypes!

Just like we make assumptions about birds, we also make assumptions about different kinds of people. We learn associations about various kinds of people through our families, friends, the media, and more. Psychologists use the term stereotype specifically for the assumptions we make about different kinds of people. Stereotyping is a fundamental, unconscious part of how the brain works, and it's not necessarily negative. One study showed that every participant engaged in stereotyping toward a person of a different race, regardless of whether they had positive or negative attitudes toward the group (Devine, 1989).

Stereotypes are generalizations; they don't fit for everyone. Think about our assumptions about birds. Several types of birds don't fly, like penguins and ostriches. More glaringly, only around half of all birds lay eggs! Male birds don't lay eggs. When it comes to people, stereotyping leads us to make generalizations about people that don't serve us well in our modern world.



One consequence of stereotyping is prejudice. This term carries a lot of baggage with it. However, at its roots, a prejudice is just a preconceived opinion; "pre-" means prior, and "-judice" means judgment. If we expect certain things from others and focus on only certain kinds of information, this is a bias. If we associate birds with flying, we'll expect that a given bird can fly. Again, we do the same thing with people. For example, we might expect a person who lives in Alaska loves to spend time outside when it's cold. These biases arise automatically when we interact with others.




We Can Control Discrimination

Prejudices can lead to discrimination, or treating people differently based on a bias. While we can't stop ourselves from having stereotypes or prejudices, we can control acting upon them! When we think about discrimination, we tend to think of behaviors like slurs and violence, but many less overt types of discrimination occur in our everyday lives.

We might think that we don't discriminate, but our biases can permeate our behaviors when we aren't making an effort to manage them. In a classic study, researchers told teachers that some of their students were "bloomers" who would grow quickly academically in the coming year (Rosenthal & Jacobson, 1968). In reality, the researchers selected these students randomly. Regardless, these students showed the most improvement at the end of the school year. The only reasonable explanation is that the teachers acted on a bias; they expected the "bloomers" to do better, and thus gave them extra attention or help.



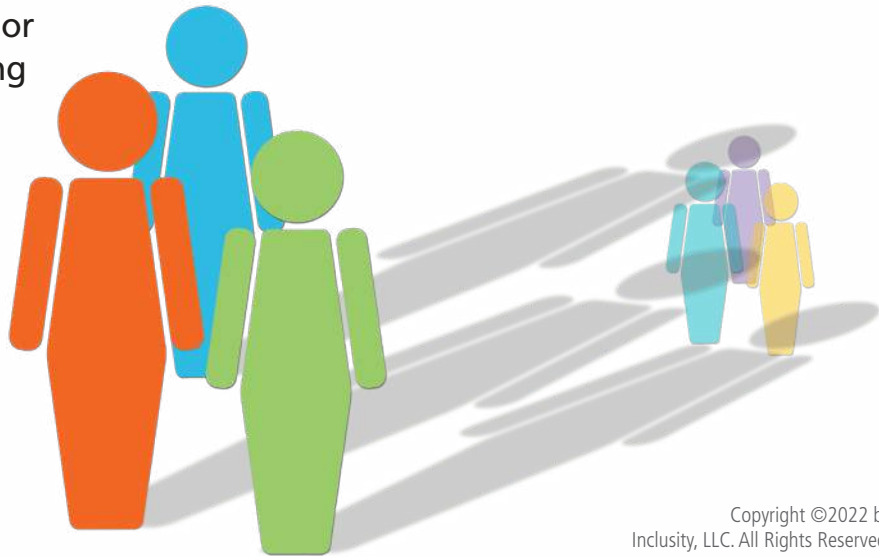
Biases can also affect behavior in the workplace. For example, in our society, people associate men with leadership (stereotype). Thus, people are likely to expect an average man to have more leadership potential than the average woman (prejudice). Because a given man is assumed to have these qualities, he is likely to be given more opportunities

STEREOTYPE 	PREJUDICE 	DISCRIMINATION 
Association	Expectation	Behavior
<ul style="list-style-type: none"> Makes navigating the world easier Many components: how people will act, what people believe, how people make us feel Inevitable 	<ul style="list-style-type: none"> Exist in the mind but can affect behavior Only paying attention to certain information Can be managed to prevent effects on behavior 	<ul style="list-style-type: none"> Treating someone differently based on expectations Controllable
Example: Associate gay men with fashion	Example: Expect an older person to be bad with technology (based on a stereotype)	Example: Assign a woman to a party planning committee because we expect her to be interested in socializing and food preparation

Social Distance Shadow™ Model

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Social distance casts a Shadow that leads to disengagement and reduced productivity.



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- Disrespectful behavior
- Expectations that diverse people should assimilate into the cultural norms of the in-norm group

The Social Distance Shadow leads to:

- Reduced communication and feedback (in both in- and out-of-norm groups)
- Decreased willingness to speak up and/or seek help

The Social Distance Shadow results in:

- Decreased coaching, mentoring and sponsorship
- Reduced ability to effectively perform tasks
- Some people feel excluded, discounted and devalued, while others feel overworked and may eventually burn out.

Notes

Conscious Inclusion Action Steps

Most of us unintentionally exclude others because of our biases and filters. Biases can be both positive and negative. They can't be erased or eliminated, but they can be managed. If we want to be intentionally inclusive, we must take conscious action. Here are some ideas to get you thinking about the personal commitments you want to take to make your organization a more inclusive workplace.

1 Modify your listening and speaking style.

Pay attention to others. Match the cultural and work style differences you encounter at work.

2 Listen for the assumptions you and others make.

Enlist your co-workers to help you. Make it upbeat and energizing, don't negatively judge yourself or each other. Remember, unconscious bias is normal!

3 Be approachable.

Let others know you want to interact with them. People don't care what you know until they know that you care!

4 Notice exclusion and do something about it.

When you see someone standing alone and you are in a group, invite them to join you.

5 Expand your decision-making circle.

When faced with a business issue, ask three people who are in different departments, of a different age, or from a different culture for their perspectives before making a decision.

6 Assess hiring and promotion decisions honestly.

If you find you follow a pattern (thinking style, educational background, experience) you may be biased. Change it up – intentionally look for differences.

7 Ask questions – be curious.

Learn about others' perspectives and preferences.

8 Test yourself for hidden bias.

Go to implicit.harvard.edu/implicit/ to take an implicit association test (IAT) to measure your unconscious bias.

9 Ask for honest feedback.

If others won't give you constructive feedback, ask specific questions, such as: "What can I do to be a better supervisor, teammate, or employee?" or "What am I doing, that I might not be aware of, that gets in the way of my productivity?"

10 Get out of your comfort zone.

Intentionally put yourself into situations that are out of your comfort zone. You will develop empathy for the reality of others and become a more inclusive leader as a result.

Individual Commitment Sharing

As a result of today's experience, I commit to put the following conscious inclusion actions into practice:

1. _____

2. _____



Transform Your Culture. **Create Inclusion.**TM



Inclusivity Facilitator Guide



CONSCIOUS INCLUSION

CREATE INCLUSIVE TEAM ENVIRONMENTS TO MAXIMIZE PERFORMANCE



■ Welcome Prep

TIME: 15 MIN.



Facilitator Objectives

- Introduce yourselves to the participants
- Establish workshop's overarching objectives
- Establish open, warm, safe environment for participants
- Establish participant guidelines
- Build connections with participants

Helpful Tips

- Stay loose. Don't be overly formal.
- Bring positive energy and enthusiasm. Be passionate!
- Thank participants for attending.
- Block out your timing for this section prior to the workshop.
- The first 20 minutes are critical for bonding with participants.
- Stay tuned in to your own emotions and manage them.
- If applicable, work with your co-facilitator(s) on which of you will do what during the workshop.

Set-Up

- **Circle-style seating preferred but depends on participant size. Classroom tables or U-shape classroom style also acceptable.**
- **For Opportunity Walk exercise, the room or setting should allow for all participants to stand shoulder-to-shoulder in a line across the room. Refer to page 21 for a diagram.**

Be Mindful

- *The Opportunity Walk can only be done in person. Ensure a replacement exercise has been added to account for the time gap.*

Materials

VIRTUAL

- Computer
- PowerPoint
- Participant Guide
- Evaluations

IN-PERSON

(in addition to virtual)

- Post-It chart paper
- Projector
- Name tags
- Pens & Markers
- Opportunity Walk handout
- For Opportunity Walk: A clean "trash" bin to use for the basket and a wad of paper

Welcome

- Introduce yourself and your co-facilitator (if applicable)
- Welcome participants to the Conscious Inclusion workshop
- Make sure participants have a copy of the participant guide (digital if virtual)
- Share workshop objectives with participants



Participation Guidelines

- Discuss participant guidelines with group
- Confirm guidelines from each participant

Participation Guidelines

ASK participants to briefly introduce themselves (30 seconds max) using the following criteria:

- Name
- Role
- Years of work experience
- A non-work achievement that you're proud of
- Confirm guidelines from each participant

NOTE: *Tally up the total number of years of work for all participants.*

Use this total number in the transition to highlight all the experience the collective group brings to this work.

Welcome

PARTICIPATION GUIDELINES

- Participate fully
- Actively listen and ask questions
- Be open and honest
- Respect others and avoid judgment
- Minimize distractions
- Keep the conversation confidential

OBJECTIVES

- Develop a connection, trust, and inclusion with other participants and facilitator
- Recognize that inclusion and diversity benefit organizations, improving engagement, productivity, and innovation
- Appreciate the uniqueness of individuals and learn how our identities shape our experience
- Understand the scientific research showing how easily biases form and affect behavior
- Explore the differences between bias, stereotypes, and discrimination
- Learn how unintentional exclusion and unregulated bias can reduce organizational productivity and climate
- Recognize what happens to people who are out-of-norm in the organization
- Gain practical tips to increase inclusion

INTRODUCTIONS

- Name
- Role
- Years of work experience
- A non-work achievement that you're proud of

2 Welcome

OBJECTIVES

- Develop a connection, trust, and inclusion with other participants and facilitator
- Recognize that inclusion and diversity benefit organizations, improving engagement, productivity, and innovation
- Appreciate the uniqueness of individuals and learn how our identities shape our experience
- Understand the scientific research showing how easily biases form and affect behavior
- Explore the differences between bias, stereotypes, and discrimination
- Learn how unintentional exclusion and unregulated bias can reduce organizational productivity & climate
- Recognize what happens to people who are out-of-norm in the organization
- Gain practical tips to increase inclusion

PARTICIPATION GUIDELINES

- Participate fully
- Be open and honest
- Listen actively and ask questions
- Respect others and suspend judgement
- Minimize distractions
- Keep the conversation confidential

PARTICIPATION INTRODUCTIONS

Please share with the group:

- Your name
- Your role
- Years of work experience
- A non-work achievement that you're proud of

SUGGESTED TRANSITION

SAY: “Excellent! All of our collective experience will be valuable to the work we have ahead today.”

SAY: “When we think about the function of work, we all come together to create a successful team and ultimately successful organization. So, let’s take a look at why inclusion is such a vital piece to our success.”

The Bottom Line - 5 min.

SAY: “Inclusivity’s goal is to help organizations create a more inclusive culture. We do this because it’s the right thing to do for many to thrive within organizations and ultimately impacts the bottom line. ”

- Summarize four points of impact

NOTE: *Facilitator has option to have participants read Page 3 of participant guide popcorn style*

INCLUSION IMPROVES BUSINESS PERFORMANCE

- Boost Productivity and Innovation**
Diverse companies are 36% more likely to outperform their peers
- Drive Engagement**
When employees feel valued and empowered, they are more likely to engage and contribute more fully
- Attract/Retain Talent**
The talent pool is rapidly diversifying, and more applicants are seeking out inclusive cultures
- Improve Competitiveness**
There's a widening profitability gap between inclusion "winners" and "laggards"

INCLUSIVE LEADERSHIP IS THE KEY TO CREATING SUCCESS!

The Bottom Line

Improve Business Performance through Diversity and Inclusion

Inclusivity's mission is to help organizations build inclusive cultures. This is the right thing to do; it will also help your company perform at its best!

Boost Productivity and Innovation
Companies that are more inclusive are more profitable. According to a 2020 McKinsey & Company report, companies in the top quartile of ethnic diversity are 36% more likely to outperform their peers. On the flipside, those in the lowest quartile were 27% more likely to underperform. According to a 2017 Deloitte analysis, companies with inclusive policies generate up to 30% higher revenue per employee. Diverse perspectives ultimately enhance problem-solving and generate new ideas. For instance, Deloitte found that diversity of thinking styles among a company's employees has been found to increase innovation by up to 20% and reduce risks by 30%.

Drive Engagement
When employees feel valued and empowered, they are more likely to engage and contribute more fully. Research from Gallup notes that team members with higher levels of engagement produce substantially better outcomes, increasing profitability by 21%. And there is evidence that inclusion is closely linked to employee engagement, notes McKinsey.

Attract and Retain Talent
An inclusive culture can help an organization both attract and keep employees. The talent pool itself is rapidly diversifying: 64.2% of millennials are racial/ethnic minorities, and the current K-12 population in the United States is 53.8% non-white. Applicants are increasingly seeking out inclusive companies. For example, Paradigm reported that 54% of employees would consider leaving their company if it failed to speak out about social justice.

Improve Competitiveness
Finally, an inclusive culture will help you improve your internal processes and your competitiveness. Inclusion is vital in supporting AbbVie's mission to be "innovation-driver" and "patient-focused." Working toward inclusion often involves implementing communication and other management strategies that have additional positive effects within the company that extend beyond inclusion. Looking externally, McKinsey reports that there is a widening profitability gap between inclusion "winners" and "laggards"; being proactive about making your company more inclusive will help guarantee you'll be one of those "winners."

Working toward building a more inclusive workplace isn't just the right thing to do, it's also vital to having a thriving, successful business. To unlock the potential for successful diverse teams, inclusive leadership is crucial. Leaders need to commit to lead every day by example to ensure that all team members feel they are treated respectfully and fairly, are valued, and belong.

Conscious Inclusion 3

SUGGESTED TRANSITION TO NEXT SECTION

SAY: “So how do we build this inclusive culture? Well, we start with our individuality and why it’s important to understand how that individuality shows up in the workplace.”

■ Elements of Individuality & Exercise Prep

TIME: 45 MIN.

■ Elements of Individuality™ Model

The Elements of Individuality Model was created to map out the many qualities that can make each individual unique. You can use it as a guide to think about what defines you and identify your most important attributes. What are three elements that could help your colleagues understand you act at work, make decisions, and what drives you?

Notes

4 Elements of Individuality™ Model

Facilitator Objectives

- Continue to establish open, warm safe environment for participants
- Identify commonalities and appreciate differences among team members to build connections

Takeaways

- Participants have a deeper connection with each other.
- So much can be learned through storytelling that is deeper than goals, projects, or peer personality assessments.
- This exercise can help build trust and identify commonalities on a team and a deeper appreciation for any differences expressed.

Helpful Tips

- Participants may become uncomfortable thinking about their elements because it is personal and not often shared in the workplace.
- Encourage participants to share as deeply as they feel comfortable.

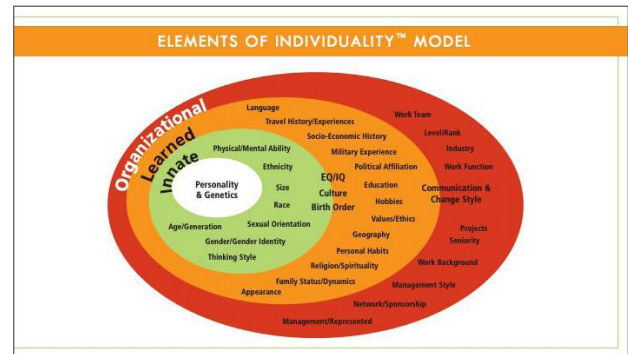
Be Mindful

- Be careful not to be overly emotional or intentionally unemotional as you share. Tap into participants' hearts, but don't make them uncomfortable by sharing at too deep a level.
- Your sharing is only an example and should take roughly two minutes.

Set Up – The Elements Exercise

EXPLAIN: Model definition

- The model is a tool that teams, and individuals can use to share information about what defines them and how it influences their behavior and relationship needs at work.
- The model guides us toward better understanding of each individual team member.
 - **Personality & Genetics (White):** These are elements that are within your DNA. They exist before we are born; nonetheless, they impact our lives.
 - **Innate (Green):** These are attributes you are born with.
 - **Learned (Orange):** These are attributes you acquire through experience or exposure.
 - **Organizational (Terracotta):** These are attributes you bring to your profession.
 - » **EQ/IQ** – Emotional Intelligence and intelligence are things we are born with, but they can also be enhanced or decrease through experience or reading.
 - » **Birth Order** – Your birth order may change as your family of origin changes (through divorce/ blended families) and it may determine to a great extent how you experience things.
 - » **Communication/Change Style** – This attribute is ever evolving based on your experience and environment.
 - » **Culture** – You may have been born into one culture, but that culture may change over time and with life experiences.



EXERCISE

- Introduce the exercise with the example in the workbook and explain each area.
- Begin modeling the exercise by sharing one (or more) of your elements.

NOTE: *The example in the workbook may not be your Elements of Individuality. Be sure to share your own.*

ASK participants to review the model and select three elements (across any of the circles) that define them the most. As they list the elements in their participant guide, define each element and why it is important for the team to know this information.

- Explain to participants that they will be sharing one element at a time. Each member of the group will share their first Element of Individuality, then their second, then (if time permits) their third.

Exercise Exploring Our Individuality

Defining Ourselves

The model on the previous page is a guide to help you think about what defines you as a person and identify your most important attributes. Please select the three most important Elements of Individuality that you believe your co-workers need to know about you. Please take a few minutes to record your thoughts in the space below.

Element of Individuality	How I Define Myself	Why My Co-Workers Need to Know This About Me
Gender	Female	I am frequently the only woman in meetings, which causes me to not compete for airspace very well.
Family Status	Single	I am very close to my immediate family, but most of my supervisor's assume that because I am single, I can work all hours of the day and night.
Geography	Global Citizen	I would love to have a global assignment someday. I have traveled all over the globe and would welcome the opportunity to live and work abroad.

Element of Individuality	How I Define Myself	Why My Co-Workers Need to Know This About Me
1.		
2.		
3.		

Sharing With Others

Next, form groups of three or four people. Share the Elements of Individuality you selected and why you think the other group members need to know this about you. Allow everyone an equal opportunity to speak and share.

ASK participants to please manage their participation so all group members have equal time to share.

NOTE: *Facilitator can encourage participants to pick in the orange and green sections to go deeper in the discussion but only if the participants are comfortable with that.*

EXPLORING OUR INDIVIDUALITY

Please select the three most important Elements of Individuality that you believe your team members should know about you.

	Element of Individuality	How I Define Myself	Why My Co-Workers Need to Know This About Me
EXAMPLE	Gender	Female	I am frequently the only woman in meetings, which causes me to not compete for airspace very well.
	Family Status	Single	I am very close to my immediate family, but most of my supervisors assume that I can work all hours of the day and night because I am single.
	Geography	Global Citizen	I would love to have a global assignment someday. I have traveled all over the globe and would welcome the opportunity to live and work abroad.

Create small groups of 3 to 5 for discussion (if small groups are needed).

» This discussion can take 15-20 minutes.

Suggested Debrief Questions -The Elements Exercise

- How did that exercise feel?
- What lessons did you take away from the exercise?
- Did you learn something new about your co-worker(s)?

SUGGESTED TRANSITION TO PICTURE EXERCISE/BIAS AWARENESS

SAY: "Great job, everyone. We are off to a great start! We learned a bit more about each other and how our elements of individuality matter in how we show up at work."

SAY: "This model is particularly useful in getting to know your teams on a deeper, more personal level and opens the door for future conversations about our lives both at and outside work."

SAY: "Our next section will continue our learning of ourselves and others."

■ Bias Awareness

TIME: 45 MIN.

Exercise The Picture Exercise

PART I:
The facilitator will show you a picture on the screen and ask you to identify items with a specific characteristic. Count the number of items you see and note in the space below.

Number of Items: _____

PART II:
You will be asked a series of questions. List your responses in the space provided.

MY RESPONSES	CORRECT RESPONSES
_____	_____
_____	_____
_____	_____
_____	_____

FILTERS & BLIND SPOTS

6 Exercise The Picture Exercise

Be Mindful

- Time! Time! Time! This exercise can run long on time if you aren't careful in time management
- These concepts will spark lots of conversation, fun, and maybe even some push back. Be sure to use your key terms to stay on topic.

Facilitator Objectives

- Open participants' eyes to the idea of bias and the role it plays in our everyday lives and work environment.
- Give participants key terms that help them open up and discuss bias.
- Diversity is real and it has real consequences.

NOTE: *This exercise essentially has three parts to it. The **first** highlights how diverse thoughts and people can lead to diverse perceptions. The **second** highlights the very real consequences of bias. The **third** focuses on the science behind how prejudice/bias/stereotypes are formed.*

Helpful Tips

- It is IMPERATIVE to practice with the slides used for this exercise.
- The facilitator must know what is coming next for each slide.

Takeaways

- Participants should see how biases can factor into how we perceive others' true abilities.
- Participants should be primed to be aware of their biases and seek to manage them.

Exercise Set-Up

- Instruct participants to turn to the Picture Exercise page of their participant guide.
- Give participants instructions and have them write down the number of blue items in their participant guide under Part 1.

NOTE: *When you give instructions, it's important to mention the color "blue" at least 3 times.*

SAY: "All set? Now remember, you have seven seconds to count the blue items."



The slide titled "The Picture Exercise" contains the following instructions:

- You will be shown a picture on the screen for approximately seven seconds.
- Count the number of **BLUE** items you see.

PART 1 Instructions

- Advance deck to appropriate slide and remember the slide will automatically advance after seven seconds.

NOTE: *Pay attention to the clicker and how you're advancing the slides. Sometimes technology does not work, and the slide does not progress after 7 seconds so you may have to jump in and advance it manually.*



PART 1 Debrief

ASK: How many blue items they saw and record the different answers?

ASK: Why they got so many different answers?

Some possible answers:

- » The way you looked at the photo. Left to right, top to bottom.
- » Definition of blue
- » Distracted by the beauty of the room
- » Colorblindness
- » Interpretation of instructions
- Validate and point out there are myriad different things that could lead to confusion on this simple exercise.

ASK a few discussion-driving questions.

Suggested Questions

- Does this ever happen at work? Where you think you have the right answer, and you get into a meeting, and everyone has different answers.
- Ever experienced a person that always seems to disagree with you?
- What do you think about them? What might be the action you take when you encounter them?

Typical answers: You may be dismissive; Or defensive; etc.

>> **POINT TO GET ACROSS:** Diversity is real, and the consequences of diversity are very real. Diverse groups of people have different perspectives on everything, including, “How many blue items did you see?” Even in the same place and time, people can have different experiences of the same thing.

NOTE: *The debrief also helps to distract the participants for at least 3-4 minutes after seeing the image – the goal is to let enough time go by, so they forget the picture! DO NOT TELL THE PARTICIPANTS THIS!*

PART 2 Instructions

- Tell participants that they did a great job in Part 1!

SAY: “There are a couple of ground rules.”

1. Don't shout out the answer. Just write down in part 2 of your participant guide
 2. If you don't know the answer, just own it. You can write your answer, but if you are guessing put a G next to your answer. The point isn't to guess the right answer.
 - » Let them know there will be five questions.
 - » Let them know that afterward, the facilitator will come back and give them the correct answers.
- Instruct them where to write their answers in the participation guide under “My Responses”.

Show the slide with the questions appearing one at a time.

THE PICTURE EXERCISE

1. How many lamps were in the picture?
2. What was in the photos on the dresser?
3. How many boxes were on the side table?
4. What was between the two chairs?
5. What was over the bed?

NOTE: *Have fun with this part!*

Participants will be baffled at this point. They may even begin questioning themselves out loud.

PART 2 Suggested Debrief Questions

ASK how many they think they got right.

NOTE: *Some will say one (1) or two (2), but most will say zero (0).*

Tell them typically with a group of 10 we may get one person who got one right.

- Remind the group they are very intelligent, highly educated, hardworking and successful.

ASK how they did not see what was in the picture

- Typical response: "I was looking for the blue items."
- Remind the group you told them to find the "blue" items.
- Tell them it was not done to trick them but rather to have them experience what bias and prejudice looks like in a low stakes' situation.

SAY: "I gave you a bias through which to see the picture. I gave you a "blue" filter. And it caused you to only see blue."

NOTE: *Research says you need only hear something 3 times from a credible source for it to become part of your belief system.*

The facilitator is the credible source in this situation and mentioned the word blue at least 3 different times.

- Point out that the word "filter" has no value judgment; however words like bias, prejudice and stereotype have a negative value judgment. We're trying to break those negative connotations.

ASK how might this play out in the workplace? In hiring practices? In promotion decisions?

ASK What they think happens to our view of our co-workers when we look at them through a bias.

ASK If it's possible that we are limiting other people's ability to contribute based on the limited vision we have of their potential?

ASK Could our biases even make us blind to other people's abilities?

NOTE: *This is a good spot to share a short personal story of how bias can blind us.*

EXPLAIN:

- This is an example of how biases can blind us from truly seeing others. We often call these biases "blind spots."

Reveal the answers on the screen

THE PICTURE EXERCISE

<p style="color: green; font-weight: bold; margin: 0;">1</p> <p style="font-size: small;">How many lamps were in the picture?</p> <p style="font-weight: bold; margin: 0;">Four</p>	<p style="color: green; font-weight: bold; margin: 0;">2</p> <p style="font-size: small;">What was in the photos on the dresser?</p> <p style="font-weight: bold; margin: 0;">Dogs</p>	<p style="color: green; font-weight: bold; margin: 0;">3</p> <p style="font-size: small;">How many boxes were on the side table?</p> <p style="font-weight: bold; margin: 0;">Five or Seven</p>
<p style="color: green; font-weight: bold; margin: 0;">4</p> <p style="font-size: x-small;">What was between An ottoman with a tray, a wine glass, and a glass bowl filled with limes</p>	<p style="color: green; font-weight: bold; margin: 0;">5</p> <p style="font-size: small;">What was over the bed?</p> <p style="font-weight: bold; margin: 0;">Sun-shaped Mirror</p>	

Reveal the photo again and allow them to see the items and look closer at the photo.



PART 3 Bias Awareness Debrief

SAY: Let's explore why biases exist based on what research tells us

EXPLAIN:

- We live in a world in which we are constantly bombarded by more information than we could possibly process.
- The human brain has developed shortcuts that help make navigating this complex world easier.
- One of these 'shortcuts' involves organizing information into categories.
- When we can sort something into a category, we may make assumptions about that thing.

Advance deck to "Brains take Shortcuts" slide.



- Tell participants you are doing to show them an object, you want them to identify the object and share what they know about the object from the image
- Some inferences: Bird, red, wings, flight, etc.

ASK participants if that was difficult or easy.

- Tell participants the ability to categorize is very useful.

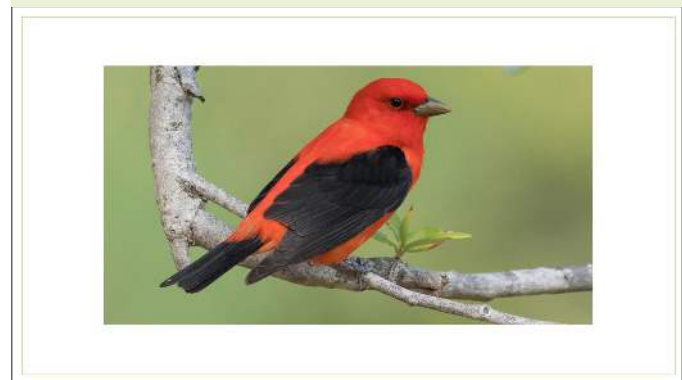
ASK: How they did the categorization?

ASK: If it was automatic or did they have to think about it?

EXPLAIN:

- That task may have felt simple, but it reveals an amazing ability of the brain to automatically categorize.
- It's likely that none of you have ever seen this specific bird, but you knew instantly what it was. That's amazing.
- If we didn't have these categories, we would have to learn about every new object individually and analytically.

Advance deck to "Bird" slide.



- Tell participants that the same process occurs in people. Just like the associations we use in defining what birds should be like, we also have associations about what different kinds of people should be like.
- Tell participants that we learn these associations through our families, friends, the media, and other places we are exposed to social information.

Advance deck to "Elderly Woman" Slide



ASK: What they can tell you about the person?

NOTE: *As you hear inferences made, do not make a point of mentioning race.*

- Tell participants that their brain's process to make assumptions worked in the same way as it did with the bird.
- Explain that another term we might use instead of associations or assumptions is stereotypes.

Advance deck to "Stereotypes!" slide



Alternative word for "associations" or "assumptions?"

STEREOTYPES!

Research shows we make many categorizations of people almost instantly, including categorizing race, gender, and age within **300ms**. How long is 300ms? 

EXPLAIN:

- Associations = Assumptions = Stereotypes!
- Inform participants about what the research shows and that we do this before we even recognize someone

SAY: "How fast is 300ms?"

Advance slide forward with one click – a red eye will flash and disappear.

- Tell participants you are going to show them another photo and you want them to say what they notice about the person.

NOTE: *Facilitator will...*

- Advance deck to a blank slide.
- Advance the deck once more, (this slide will show someone who presents as an Asian male in their 30s and disappear on its own.)

ASK participants to tell you what they noticed.

TO FACILITATORS:

Looking for race, gender, and age descriptions. There may even be other descriptions that participants share. Key here is that usually those three things are typically noticed the quickest.

- Tell participants that's how quickly we can make those assumptions!



- Share that everyone stereotypes and what the research tells us.

Advance deck to "Everybody Stereotypes" slide



Everybody Stereotypes!

- It's a fundamental part of how the brain works
- A very influential psychology study showed that all people in the study stereotyped a member of a different racial group: their personal attitudes about the group *made no difference.*

- Explain that the problem with stereotyping is that a stereotype is a generalization: it doesn't really fit for everyone.

Advance deck to "A Stereotype is a Generalization" slide (penguin, ostrich)

- NOTE:** *The penguin and ostrich break many of the points people made about the bird. Maybe make explicit? If someone says, "lays eggs," that's actually something only half of birds do (only females lay eggs)!*
- Explain that stereotypes can be useful for organizing our world, but they can often lead us to make unfair generalizations about different kinds of people that don't serve us well in our modern world."

A stereotype is a generalization.



Advance deck to "Understanding Prejudice" slide

UNDERSTANDING PREJUDICE

Pre • judice

Prior Judgment

Bias in our expectations and our attention.
Natural extensions of stereotypes.

EXPLAIN:

- Prejudice is "pre-" = prior, "judice" = judgment.
- Prejudice is a preconceived judgment or opinion.
- We use bias and prejudice interchangeably.
- It is a bias to expect certain things from others and attend to certain kinds of information.
- Biases are natural extensions of stereotypes. If we associate birds with flying, we expect that a given bird will be able to fly.

- Explain that in the picture exercise their bias was essentially to attend to certain kinds of information and not others.

PROVIDE EXAMPLE

- Keep any personal examples to a relatively innocuous level
- Example: One of our colleagues often says, as a gay man, he has found that people often expect him to be interested in fashion or want to go shopping.
- Example: Asian people often have the experience of people assuming they will be good at math.

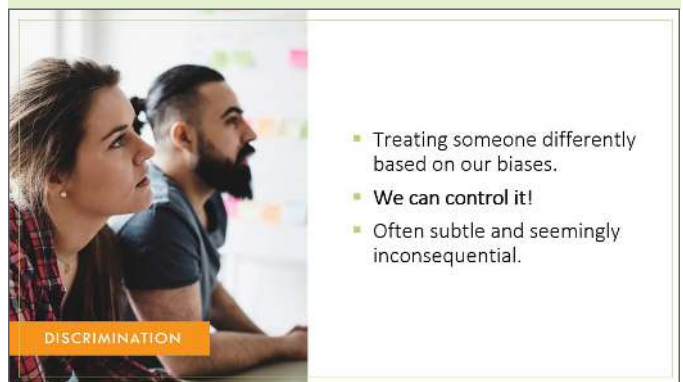
EXPLAIN:

- Explain that biases like these frequently and automatically come up when we interact with others. Having a bias is not good or bad, it's just human.
- Explain that what is concerning is discrimination. So, let's talk about that term, too.

EXPLAIN:

- Explain that managing biases so that they do not affect behavior is a major emphasis of the work we're doing here.
- Explain that often when we think about discrimination, we think about things like racial slurs, violence, etc., but there are many less overtly negative examples of discrimination in our everyday lives.

Advance deck to "Discrimination" slide



PROVIDE EXAMPLE

- Optional based on time left; it should be short and to the point
- Provided Example: "In my math class I'm looking for some additional peer help and I gravitate to an Asian student. I might pause and ask myself, "Am I having this reaction because this student has shown their math ability or am I just expecting that based on what they look like?"

Advance deck to "Why Do We Do This?" slide

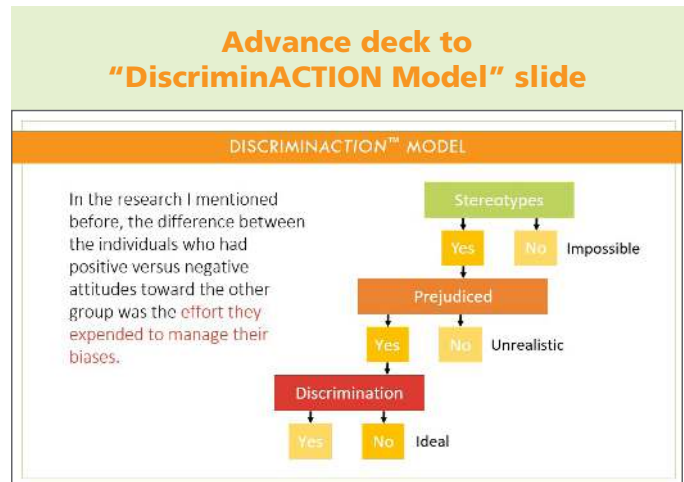


- Share why we do this and what the research tell us

- Remind participants that we all stereotype or make assumptions. We all have prejudice or make preconceived judgments or opinions.

EXPLAIN:

- Explain the DiscriminAction Model and how it helps us understand how we should handle our biases.
 - » Having stereotypes and having prejudices are inevitable: they're just how the brain works.
 - » We have control over our behavior
 - » Our ideal decision is not to act in a discriminating way.



- Share the human side of having bias as highlighted on the slide

EXPLAIN:

- That the behaviors you have mentioned (briefly recall the examples you used) might not seem like a very big deal. But these kinds of subtle behaviors can have big effects on their targets.
- Review some additional examples regarding the impact of bias.

Advance deck to "It's Just Human" slide

- No guilt! No shame! To be biased is to be breathing.
- It's not good or bad, it's just human.
- Do not avoid or suppress bias, identify and work on bias.
- You can't manage what you don't know.

Advance deck to "Impact of Bias" slide

The "Bloomers" Study

- Teachers were told certain students would more readily advance
- At the end of the year, these "bloomers" performed better
- The selection of the "bloomers" was random!

EXPLAIN:

- The example from the Bloomer Study (Rosenthal and Jacobsen, 1968) and that the only reasonable explanation is that the teachers provided these students with extra attention based on the bias instilled by the researchers
- Tell participants to take a look at some examples of how this might occur in the workplace.

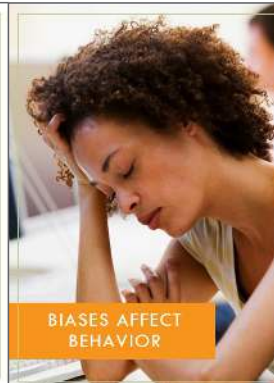
Advance deck through the next two slides, illuminating the bulleted points and connecting them using the previously introduced terms (stereotype, prejudice, discrimination).



What examples might occur in the workplace?

MEN IN LEADERSHIP

- People associate men with leadership (stereotype)
- People expect that the average man has more leadership potential than the average woman (prejudice/bias)
- Men are given more opportunities to prove leadership ability than women (discrimination)
- When the men perform well, that reinforces the bias

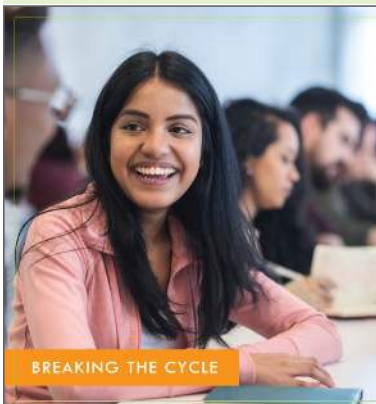


What examples might occur in the workplace?

SETTING PEOPLE UP FOR FAILURE

- We may associate a certain group with being less capable (stereotype)
- We expect them to fail to rise to a challenge we set for them (prejudice/bias)
- We give them inconsequential work and limit our own investment in their work (discrimination)
- When they fail (which we played a role in), that confirms our expectations

Advance deck to “Breaking the Cycle” slide



- By actively managing biases, we break the cycle and help to change our biases, making managing them easier over time.

- Highlight the impact of actively managing biases to break the cycle so we don't discriminate unintentionally due to blind spots

SUGGESTED TRANSITION

SAY: “As we become aware of our biases, prejudices and stereotypes we can certainly manage them better.”

SAY: “The more effective we are at managing our biases, the more cognizant we will be of making sure everyone around us feels included. And to do that, we must understand how exclusion happens and why we must be deliberate about including everyone.”

Set Up the Model

SAY: “Earlier we spent a fair amount of time connecting through our elements. Now, let’s talk about what happens if we don’t embrace our elements within the workplace and how that can lead to a breakdown within our team.”

- Direct participants to the Social Distance Shadow model page in their participant guide.

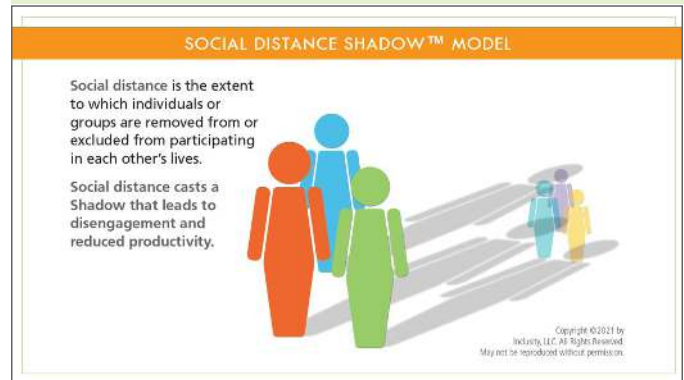
ASK participants to describe what they see in the image.

- Highlight things like character sizes, the long shadows, character translucence, light on larger characters.
 - Every element of individuality has an out-of-norm and an in-the-norm group.
 - The out-of-norm group is less visible, and the in-the-norm group is more visible.
 - The in-the-norm group makes decisions and has more of a voice.

EXPLAIN:

- The Social Distance Shadow model
- Social distance is the extent to which people are excluded from participating in each other’s lives.

Advance to Social Distance Shadow slide and go through bulleted points)

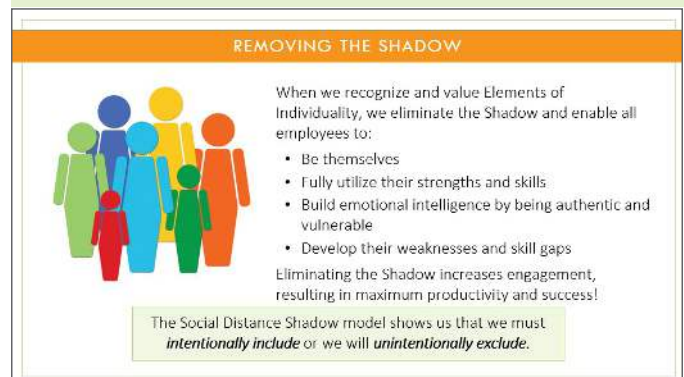


Advance to next Social Distance Shadow slide and go through bulleted points

SOCIAL DISTANCE SHADOW™ MODEL		
The Social Distance Shadow is created by:	The Social Distance Shadow leads to:	The Social Distance Shadow results in:
<ul style="list-style-type: none"> • Unmanaged biases • Disrespectful behavior • Expectations that diverse groups of people should assimilate into the cultural norms of the in-norm group 	<ul style="list-style-type: none"> • Reduced communication and feedback (in both in- and out-of-norm groups) • Decreased willingness to speak up and/or seek help 	<ul style="list-style-type: none"> • Decreased coaching, mentoring and sponsorship • Reduced ability to effectively perform tasks • Some people feel excluded, discounted and devalued, while others feel overworked and may eventually burn out.

- Explain how the shadow is created, what it leads to, and the results of the shadow existing.

Advance to Removing the Shadow slide and go through bulleted points



- Emphasize “If we do not intentionally include, we will unintentionally exclude”

SUGGESTED TRANSITION TO OPPORTUNITY WALK

SAY: “To explore this further and apply it to our workplace we are going to do an exercise we call the Opportunity Walk.”

■ Opportunity Walk Prep

*This exercise will require a large space for your participants. A large room with little furniture or space outdoors (weather permitting) is preferable. Your need for a small group vs larger group of participants will be a key factor.

Exercise The Opportunity Walk

Sometimes we take for granted the privileges and opportunities that we have been given in our lives. And sometimes we do not understand how the things we take for granted make the workplace easier for some and more difficult for others. This matters because barriers can cast "shadows," and we all need to help each other be our full selves and contribute to our maximum potential. The Opportunity Walk exercise is a wonderful way to:

- Remind us of our privileges and barriers
- Create empathy for all of the barriers that exist for ourselves and others
- Help us to be more consciously inclusive team members



Be Mindful

- Be careful of overusing the word privilege. It can often trigger or distract participants
- Some participants may be resistant of the activity or idea of privilege all together. Validate and allow them to experience those feelings and while encouraging them to push themselves outside of their comfort zone with their colleagues just for today.
 - » Let them know they can always choose not to answer a question by standing still

Exercise Objectives

- Provide a physical metaphor for participants to experience their "opportunities" or privilege as they will come to understand it, across various Elements of Individuality and a physical demonstration of social distance
- Connect participants' opportunities or experiences impact everyone's role on a team and/or in the workplace

Helpful Tips

- Scout out your Opportunity Walk space ahead of time to ensure you have the right amount of space
 - » If the space not ideal, this will give you time to adapt your plans to the room (Circle vs Shoulder to shoulder)
- Feel free to reach out to your assigned operations person to ensure your room's location and space are appropriate for this exercise

Takeaways

- We all have a role in helping our teams succeed, regardless of individual "opportunities" or experiences
- It's important to have empathy, not sympathy for those with different "opportunities" than you. Remember that in this activity, you all made it to the same team, chosen to achieve a task.

Instructions

INSTRUCT PARTICIPANTS:

- Line up shoulder-to-shoulder in the center of the room.
 - Listen to each statement and only respond accordingly if it applies to them.
 - They will be asked to take a step forward or a step back, or just to stand still based on their response to the question.
 - If they feel unsafe or don't want to respond to a statement, they can remain still for it.
 - Face forward, remain silent and do their best not to pay attention to others, but rather focus their own feelings and thoughts that may come up.
 - They'll discuss their feelings and thoughts after the exercise is completed.
- Begin sharing the statements at a pace that accommodates all participants; make sure you're loud enough and repeat as needed.



TO FACILITATORS:

- *The complete list of statements for this exercise can be found in the addendum.*
 - » This list may have been customized for the group. Make sure you review the statements to note any differences from previous times you have conducted this exercise.
 - » At the end of each statement, there's a letter that represents the EOI referred to in the statement, as well as a +/- sign indicating that participants step forward or step backward
 - » Example statement: If you had 50+ books in the house you grew up in take one step forward. (SE/E+)
- *It's sometimes helpful to stand close to the front of the room and walk toward the middle of the room repeating questions as needed.*
- *Manage their physical safety; make sure to note furniture or other objects in their path*
- *Manage their emotional safety as well, keeping an eye on anyone changes dramatically during this exercise*

PART I Debrief

- Thank everyone for completing the activity and being as vulnerable as they were.
- Starting with the front of the room, then the back, then the middle:

ASK: How did you feel while going through the exercise?

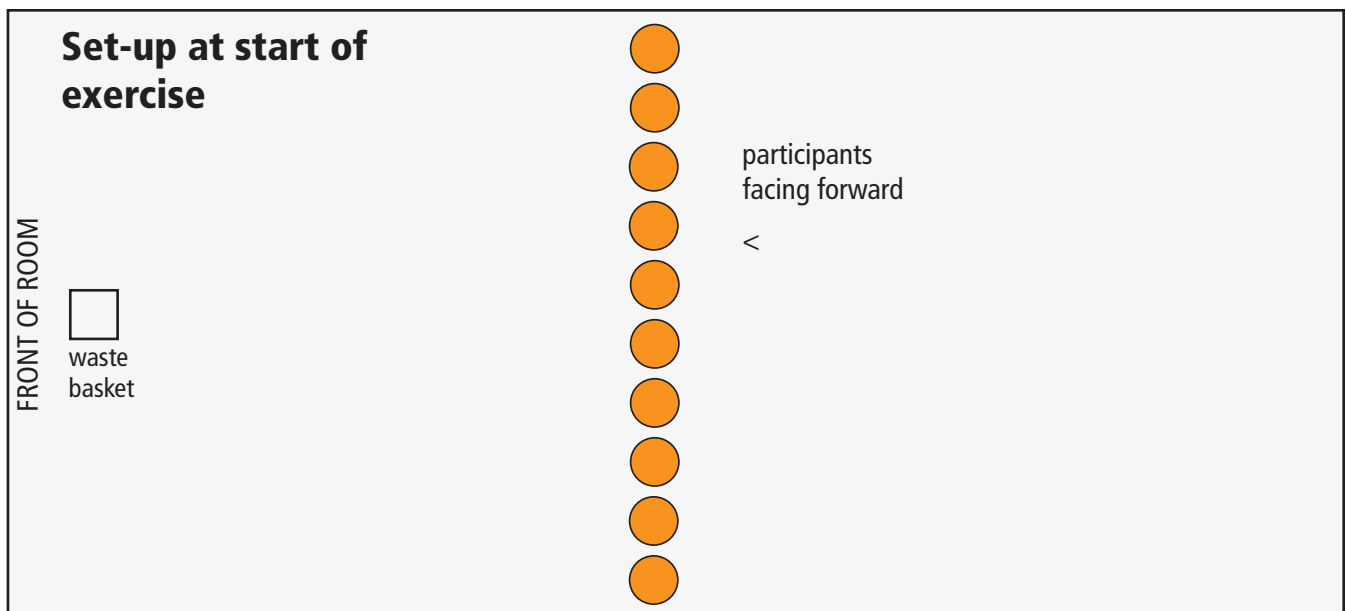
- » **Front:** May have feelings of guilt. Remind them they had no choice in these questions or what happened to them based on their upbringing.
- » **Back:** May have feelings they had not thought of before. They may be feeling quite emotional and even weepy. Remind them they made it despite all those things. Remind everyone that just because someone responds differently to the question than another does not mean they were any less loved or happy as a child or in their family. Show empathy by going and standing next to the individual (but do not touch them).
- » **Middle:** May have feelings of being boring or of not mattering. Explain that everyone matters and that everyone is an important member of the team – and they will understand why in just a minute.

PART II Debrief

NOTE: *The following contains multiple "SAY" statements. These are not scripted words. They are only meant as suggested thoughts to move the exercise along.*

ASK participants to stay where they are and remain facing forward

- Get a small garbage can (that you have identified prior to the exercise and emptied if necessary) and place it in front of the person in the front of the room.
- Ball up a piece of paper and give it to the person.



SAY: “OK, we are going to do a little exercise. Imagine you are a member of an organization, and you have been given an opportunity to develop an innovation that will guarantee the success of the organization for the next 10 years. If you fail at this project or task, you will most likely go out of business, putting the entire team out of work – so this is an important project.”

- To the person at the front of the room:

SAY: “Now here’s the project (actually this is a representation of the project): You need to take this wad of paper and put it in the basket—scoring a goal and succeeding at the project.”

ASK the person how confident they are that they can complete the task. (*Most of the time they are 100% sure they can succeed.*)

- Give the person the paper and encourage everyone to cheer them on.

SAY: “Wait a minute, I goofed. You’re not the one given the task. Another team member is actually responsible for the success of the project.”

- Give wad of paper to the person who is farthest away from the basket.

SAY: “This is really your task to complete.”

- **ASK** the person how confident they are that they can complete the task. (*They are usually not at all confident that they can succeed.*)

-
- Remind the group not to move from their spots during this exercise and then, ask the individual in the back of the room to give it a try. (They will almost certainly fail!)

NOTE: *If a person makes the basket, note how very rare this is and congratulate them.*

- » You can have them try again several times to see if it keeps happening or give it to another person of close proximity to see if they also make the basket.
- » The point is that sometimes people do make the basket when there could be barriers, but that’s not the norm in most situations. Usually help is needed to ease or ensure success.

SAY: “What happened here? Was the person in the back of the room, less qualified than the person in the front of the room?”

ASK the group if it’s possible that a person with the least number of opportunities and most barriers is asked to accomplish a great task.

Yes, it absolutely can.

ASK participants what they could do to achieve success in the project.

NOTE: *If someone says move the basket.*

- » Ask the group if the organization is used to lowering its standards?
- » Explain that with inclusion and diversity work it is important that we never lower our standards or unfairly advantage anyone.

ASK participants what they were doing while the person in the back was trying to make a basket.

- Their answer should be they were looking forward.

ASK If they were doing anything wrong?

- The answer is no. They were focusing on their jobs, their roles, their careers, and their families. This is not wrong. They are good people. AND they were good people who were unintentionally excluding.

SAY: (Rhetorically) What do you believe the person in the back needs to succeed with this project? Well, they need help! Who is going to help them? WE are!"

- Instruct participants that if they'd like to be intentionally inclusive and help their company succeed, then turn around without changing their position.

ASK the person in the back of the room how they think they can get the ball to the front row. Remind them they need to use their team members and hand them the ball.

SAY: "Make sure your team members are ready to catch things. You don't want to take the risk of a throw not being caught and the project failing."

NOTE: *If the gap between team members is ever too large, you can remind them they can always call in a consultant (Inclusivity!) to help bridge the gap.*

- Allow team to work together to accomplish the task of putting the ball in the basket. Cheer them on and encourage them to celebrate their success.

EXPLAIN:

- A company or organization can only be as successful as the person in the back of the room. It doesn't matter if you have only one or two superstars. If everyone doesn't know how to succeed, they cannot all succeed together.
- Just because someone is in the back of the room and has experienced fewer privileges than their peers, does not mean they are less qualified (that would be a bias!). In fact, they have arrived in the same room as everyone else!
- What contributes to success is how they support each other and make sure that everyone is getting what they need to be successful

SUGGESTED TRANSITION TO NEXT SECTION

SAY: "Thank you again for participating in the opportunity walk. I hope the exercise and debrief helped each of you recognize some of the privileges of being in the norm and barriers to being out of the norm that affect us all at work."

SAY: "So as we promised you this morning, we're going to talk about some tangible action steps you can each take to help create a more inclusive workplace." "

Instructions

- Instruct participants to read the 10 action steps popcorn style

NOTE: *Facilitators have the option of summarizing the 10 steps.*

SAY: What conscious inclusion actions will you put into practice after today's session?

ASK if there are any questions or clarification needed before moving on to Individual Commitments



Individual Commitments

NOTE: *If virtual, create small breakout rooms via Zoom.*

SAY: "When you get into your small group, discuss your commitments and get thoughts, feedback and ideas from other group members. Choose an accountability partner within your small group."

■ Individual Commitment Sharing

As a result of today's experience, I commit to put the following conscious inclusion actions into practice:

1. _____

2. _____

SUGGESTED DEBRIEF QUESTIONS

- Offer participants an opportunity to share their action steps.

SAY: "How are you feeling about what you committed to?"

- Instruct participants to make a specific plan to follow up with their accountability partner to encourage and support them in their action steps.

SUGGESTED TRANSITION TO CLOSING & EVALUATIONS

SAY: "Alright! We've spent this time learning and growing together and now each of you have some individual commitments to get you started in the process of making your workplace more inclusive."

- Thank participants for their attention and engagement.
- Instruct participants to complete the evaluations before they leave.

NOTE: *Paper if in person or electronic if virtual*

