Learn to Develop a Sustainable Inclusion Plan for Organizational Transformation

Sharpen Your Inclusion Edge: The 8 Step Approach

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CARE   CONFIDENCE   COMPETENCE   COMMUNITY

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This is a training.
This is DEI in action.

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Sharpen Your Inclusion Edge: *The 8 Step Approach*

❑ **LAYING THE FOUNDATION**

❑ **STEP 1:** Determine Your Why- Set Clear Intentions & Goals

❑ **STEP 2:** Eliminate Confusion & Chaos- Examine Language

❑ **STEP 3:** Identify Leaders – Develop a case for the ROI of Inclusion

❑ **STEP 4:** Assess Organizational Culture- Analyze the Current Climate

❑ **STEP 7:** Develop a Strategic Inclusion Plan with SMART Goals- Develop Accountability Measurements

❑ **STEP 8:** Take Action Now: Be Bold.

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SYIE in ACTION: WHAT IS YOUR "SAMANTHA" STORY?

Samantha notices an inconsistency in her company. People on the administrative team are promoted into management level positions without an interview or application process, while people in other teams must undergo an interview process for management positions.

She then decided to find more evidence, gather data internally, and assess the organizational culture to help her, determine the policy to be changed to support her idea.

She went to her supervisor to make the case for clear, consistent promotions & internal hires in the company. She explained her why - there will be more trust in leadership & a greater ability to retain excellent staff with a clear promotion process.
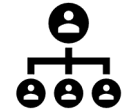
Then Samantha worked with colleagues of the Inclusion Action Team to brainstorm ideas for updated policy and procedure and worked with the group to discuss blind spots and bias.

Afterwards, she presented an updated policy and procedure to her supervisor and worked with leadership to confirm and communicate the policy.

Lastly, her supervisor and the leadership team created an accountability measure (review hiring & promotions process yearly for internal promotions & hires, and survey for internal candidates) for the policy.

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You have the power.

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Laying the Foundation

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ABCs: Community Trust Building Norms

Align- Work toward collective understanding.

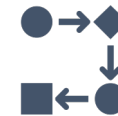**Belong**- Try to understand what each person needs to fully contribute.

Center- Be present. Set your own boundaries.
Confidentiality: Be respectful of privacy.

Disagree- Build a culture of critical feedback.

Elevate- Design a process of discovery.

Forgive- Acknowledge mistakes, learn from them and stay in this journey together.

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Brave Space

- An environment where people have learned to **receive and give critical and constructive feedback**. Differences of philosophy, language, and ideas should be respected.

- You are willing to extend **grace** to yourself and to others.

- When this occurs, everyone is pushing themselves to be **mature** by expressing their thoughts and feelings with professionalism, poise, and candor.

- You are not afraid to be **critically challenged**, about your thoughts, your position and your experiences, and finding ways for people to learn from one another.

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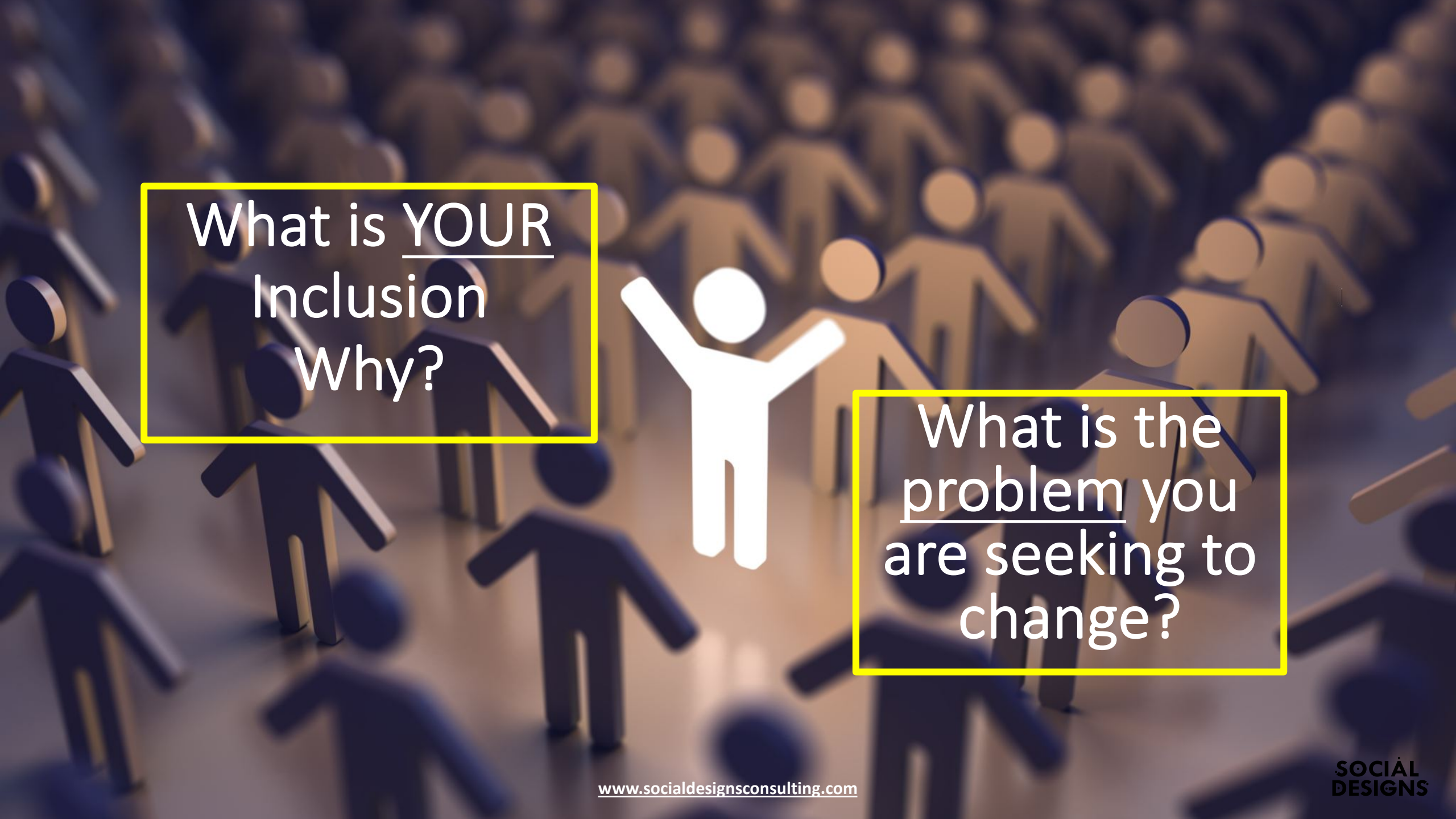
SHARE YOUR REACTIONS TO THE VIDEO.

PRACTICE AFFIRMING & BEING CURIOUS.

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Step 1: Determine Your Why- Set Clear Intentions & Goals

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What is YOUR
Inclusion
Why?

What is the
problem you
are seeking to
change?

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Step 2: Eliminate Confusion & Chaos- Examine Language

What is Diversity, Equity, & Inclusion?

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1. Examine Language

2. Confirm the Definitions

3. Revisit Often.

- **<u>DIVERSITY</u>**: The range of human differences including, but not limited to race, ethnicity, gender identity, sexual orientation, age, social economic class, physical abilities or attributes, religious or ethical value systems, national origin and political beliefs. – Ferris State University

- **<u>EQUITY</u>**: The process for historically underrepresented & marginalized populations to have equal access to and participate in programs that can close the achievement gap in success, health, life expectancy, and academic performance.

- **<u>INCLUSION</u>**: A process of bringing people together from various backgrounds and creating an environment of success for all people.

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Other Terms

- **Justice**: fairness

- **DBE**: Disadvantaged Business Enterprise

- **Social Determinants of Health**: Economic stability, environment, education, food, social context, health

- **Culture**: a way of life

- **Belonging**: feeling of active security, acceptance, and celebration within a group or in an organization.

- **Implicit Bias**: the attitudes or stereotypes affecting our understanding, actions, and decisions in an unconscious manner

- **Coded Language**: terms with multiple and or hidden meanings

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Step 3: Identify Leaders- Develop a Case for the ROI of Inclusion

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Make the case for Inclusion.

Phases of Inclusion Action Teams

Underdeveloped Team

Newly Developed Team

Seasoned Team

Sunset Team

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VARIATIONS OF INCLUSION ACTION TEAM STRUCTURE

Senior Leaders & Staff

Community Driven & Led

Staff Led with one Board Member and one Senior Leader

Staff, Board, Community, Senior Leaders

One Inclusion Action Team and One Senior Staff Team

SURVEYS, EVALUATIONS, FOCUS GROUPS, & ASSESSMENTS
OH MY!
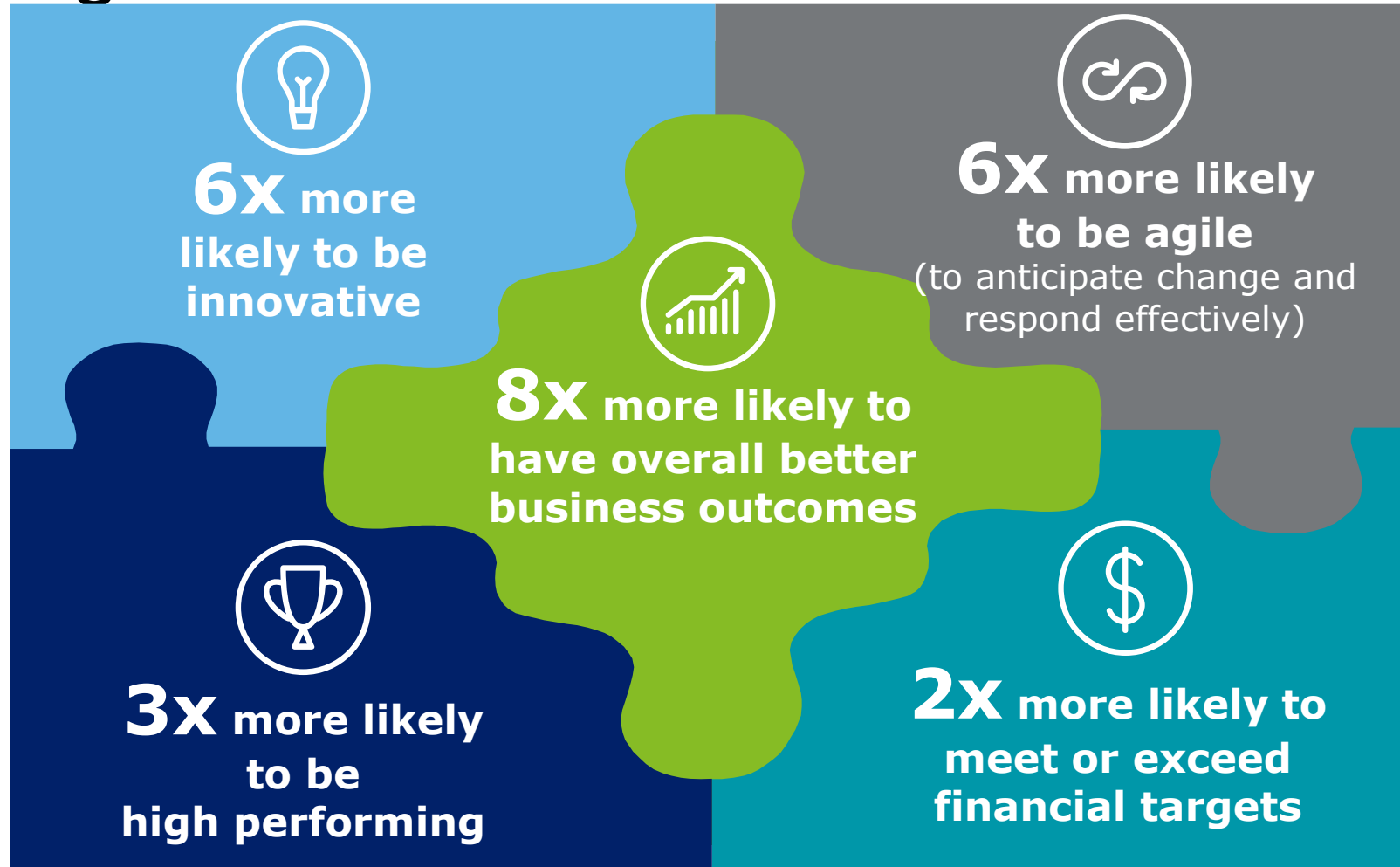
Tool for Developing Your Team

- Tool for Developing Your Team

- Practicing Sharing Different Perspectives with the Team.

Culture Wheel Card Game

www.culturewheelcardgame.com

DIRECTIONS
1. BE CONCISE & DESCRIPTIVE.
2. AFFIRM FELLOW PARTICIPANTS.
3. BE CURIOUS.

Step 4: Assess Organizational Culture- Analyze the Current Climate

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Culture.

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PERSONAL & COMPANY CULTURE ARE CONNECTED.

- ❑ **Culture** - a group's particular "way of life" - knowledge, experience, beliefs, values, attitudes, meanings, hierarchies, religion, notions of time, roles, concepts of the universe, material objects...

- ❑ Companies have culture.

- ❑ Your culture may align with the company culture.

- ❑ Your culture may clash with company culture.

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Let's Work:
Assessing & Enhancing Organizational Culture

Go to www.socialdesignsconsulting.com/durham
Click the Conference Org. Culture Board

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Social Designs Organizational Culture Components

Conflict Resolution

Data Collection

Decision Making

Language

Hierarchy & Relationships

Communications

Space

Accountability

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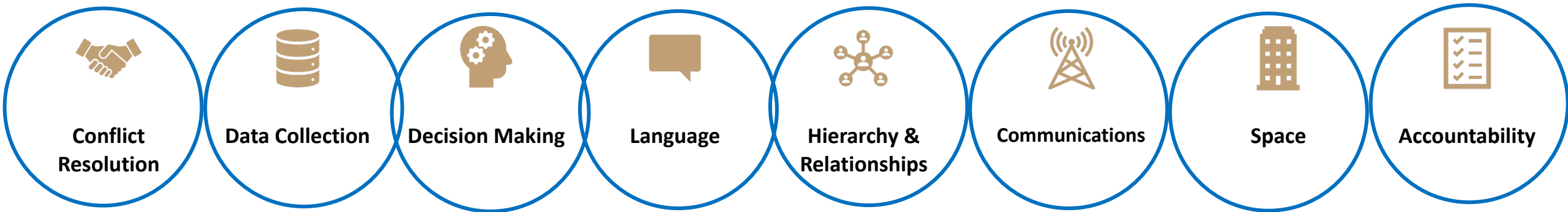
Assess what is "VALUED" in Your Culture ... bravely ☺ What would Samantha say?

What trends, cycles, patterns, are evident?

What are your ideas for a more inclusive _____ culture?

Example: Organization, Department, Board, Staff, Volunteers, Etc.

TRADITIONAL NEGATIVE EFFECTS

*What about this component of culture is exclusive?

*What is problematic about our culture?

*How does this characteristic create harm/detriment ?

TRADITIONAL POSITIVE EFFECTS

*What about this culture component is inclusive?

*What is productive about our culture?

*How does this characteristic create harmony/success?

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Assessing & Enhancing Organizational Culture

Assessing **Conflict Resolution**

Questions to consider:

-Are there mechanisms in place where people know what steps to take when conflict arises?

-How is conflict resolved?

-Are there protocols and practices in place to manage conflict?

-How do these practices impact your goal of advancing inclusion?

- **What is valued?**

Value is evidenced by what is supported and funded.

- _____
- _____
- _____

Avoidance.

Town hall sessions.

- **In what ways can you create more inclusion?**

- Practice dialogue principles.

- Pause when needed to address bias or inequity in the moment.

- Value and model courage & compassion

- Use the CCL SBI tool when addressing conflict.

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Assessing & Enhancing Organizational Culture

Assessing

<mark>Data Collection</mark>

Questions to consider:

-What data is missing in your current process?

- How can you assess the bias of the data collection methods?

-What are the anecdotal histories of the institution?

- **What is valued?**

  Value is evidenced by what is supported and funded.

  · _____

  · _____

  · _____

  Entrance interviews for staff.

  Collecting demographic statistics for all grantees.

- **In what ways can you create more inclusion?**

- Require a diverse pool of applicants.

- Ask about the different types of demographics served and outcomes.

- Disaggregate data to understand who's being most affected and least affected by managerial decisions.

- Encourage participant-client-community centered methods.

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Assessing & Enhancing Organizational Culture

Assessing <mark>Decision-Making</mark>

Questions to consider:
- How are decisions made?

- Where & when are decisions made? (lunch, coffee dates, formal, informal)

-What is the Board's relationship with leadership and how do these relationships effect decisions?

-Do managers have to talk to top-level managers to start a program or initiative?

- **What is valued?**

  Value is evidenced by what is supported and funded.

  · _____

  · _____

  · _____

  The Board makes final fiduciary decisions based on staff analysis.

  The Board chair and president make final budget decisions without input from staff.

- **In what ways can you create more inclusion?**

- Require multiple voices in decision-making by asking for all opinions via round-table, popcorn, or anonymously.

- Having those most impacted/proximate to the issue make decision on strategy/grantmaking.

- Use surveys and evaluations often.

- Make more decisions by consensus rather than by hierarchy/leadership decision

- Pay a selection committee that represents the communities you hope to serve.

- Be clear about what is a consensus decision and what is not a consensus decision.

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Assessing & Enhancing Organizational Culture

Assessing <mark>Language</mark>

Questions to consider:
- Are there opportunities for people to speak different languages?

-Does the organization have a multilingual culture?

-What are common words and phrases?

- ## What is valued?

  Value is evidenced by what is supported and funded.

  • _____

  • _____

  • _____

  English is the primary language used verbally and in writing.

- ## In what ways can you create more inclusion?

- Require a diverse pool of applicants.

- Multi-lingual greetings

- Multi-lingual board members.

- Offer materials in multiple languages.

- Closed-captioned webinars.

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Assessing & Enhancing Organizational Culture

Assessing
Hierarchy & Relationships

Questions to consider:
- How do people distribute power, allocate resources, and make decisions?

-Are people allowed to communicate directly to anyone in the organization?

-How are wages and compensation determined based on the hierarchy of the organization?

- ## What is valued?

  Value is evidenced by what is supported and funded.

  • _____

  • _____

  • _____

  All staff must communicate with president before speaking to a Board member.

  Staff are allowed to speak to Board members about staff issues.

- ## In what ways can you create more inclusion?

  • Emphasizing cross-departmental work groups.

  • Rotate who leads and facilitates staff meetings.

  • Invite board members to staff meetings and vice versa.

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Assessing & Enhancing Organizational Culture

Assessing ==Communication==

Questions to consider:
- What are the rules, spoken or unspoken, about matters such as texting, or hanging together outside of the workplace?

- Are important decisions communicated in writing via email or verbally?

-Is it ok to turn videos off during video calls?

• **What is valued?**

Value is evidenced by what is supported and funded.

•_____

•_____

•_____

Decisions are made by communicating final steps via email.

All videos are required during Zoom/Teams.

• **In what ways can you create more inclusion?**

• Closed-caption on webinars/videos/etc.

• Have multi-lingual board members.

• Prompt everyone to speak during meetings.

• Utilize technology such as Google Docs or EasyRetro Board to communicate ideas and opinions internally.

• Ask each person to state their name before speaking on video conference call.

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Assessing & Enhancing Organizational Culture

Assessing <mark>Space</mark>

Questions to consider:

- Are braille signs available?

- Is content available virtually?

-Who is represented on the walls, statues, buildings, etc.?

-How can multiple cultures be represented more frequently?

- **What is valued?**

  Value is evidenced by what is supported and funded.

  • _____
  • _____
  • _____

All desk are optional standing desks.

Art is purchased from each art gallery in the city each year, rotating per year.

- **In what ways can you create more inclusion?**

- Highlight art by diverse artists in the office.

- Remote/ virtual options to participate.

- Install accessibility ramps.

- Offer and train staff to use immersive reader options.

- Support the overlap of personal and private when on virtual calls (be patient when children, spouses, family, may be around or near.

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Assessing & Enhancing Organizational Culture

Assessing
<mark>Accountability</mark>

Questions to consider:
- What accountability systems (protocol, practice, policy) are currently in place to address conflict?

-What are scenarios in your experience where you have seen accountability processes go well or end poorly?

- What happens when staff make mistakes with clients?

-How are senior leaders held accountable?

- **What is valued?**

  Value is evidenced by what is supported and funded.

  · _____

  · _____

  · _____

  When tasks are incomplete, random members of the team pick up the 'slack'.

  Roles and responsibilities are clearly laid out for each big project.

- **In what ways can you create more inclusion?**

- Develop accountability rounds at the end of meetings.

- Detail disciplinary actions in policy.

- Implement a clear performance review process.

- Utilize MOCHA, DARCI or other management tools.

- Identify expectations and assumptions monthly.

- Encourage Community Centered Research & Partnership Methods.

- Define feedback loops.

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It could be that your team needs to have difficult conversations, envisioning conversations, or simply time to realign. It's not going to always be a policy and practice change.

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Updating Policy & Practice

- **<u>What is a policy?</u>** **A set of rules, guidelines or, plans that support what employees should or should not do in a decision or situation.**
  - **"Policy is a law, regulation, procedure, administrative action, incentive, or voluntary practice of governments and other institutions." - CDC**

- **<u>What is a practice?</u> The expected or habitual way of doing something. Doing something repeatedly in order to improve it. (This is less official and often what <u>actually</u> happens.)**

- **<u>What is a procedure?</u> "A series of actions conducted in a certain order or manner." - Oxford Dictionary**

- *Policy may be the long game, practice may be a shorter turn around. Both are important. You ALWAYS have your 15% in any given situation or role!*

Policy & Practice Review

INTERNAL PROMOTIONS

POLICY

- Is the policy successful in bringing about the intended outcome?

- Are the terms of the policy explicit?

- Is the accountability structure clear if the policy is not implemented?

PRACTICE

- Is the practice successful in bringing about the intended outcome?

- Are the rules of the practice explicit?

- Is the accountability structure clear if the practice is not implemented?

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Step 7: Develop a Strategic Inclusion Plan with SMART Goals- Develop an Accountability Measurements

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Develop a Strategic Inclusion Plan

SPECIFIC **MEASURABLE** **ATTAINABLE** **RELEVANT** **TIME BOUND**

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Execute the Plan

Accountability

Timeline

Measurements

Success

Roadblocks & Criticism

Financial Resources

Time, Training, Tech Resources

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Culture supportive of healthy conflict and open mistakes, supports the ability for people to be honest about <u>accountability</u>.

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DARCI

How it works

With regard to a specific project, assign clear accountability as follows[1]:

- **DECIDER/DELEGATOR**: Holds the ultimate power re. the project. Power can be retained as the right of final approval/veto, or delegated to the **A**. The **D** might be an individual leader, or it could be a group such as the management team or Board.

- **ACCOUNTABLE**: The single person fully accountable for making the project happen. The **A** must be given sufficient decision-making power and room to learn/adjust commensurate with accountability. It is possible for a **D** to also be the **A**. There should never be more than one **A**. This is an invitation to lack of clear accountability. If no one is willing to be the **A**, do not proceed.

- **RESPONSIBLE**: Those responsible for doing the work on the project. There may be a number of **R**'s on a project. **R**'s are responsible for dealing with roadblocks, raising questions, etc. – not just being "good soldiers."

- **CONSULTED**: Those from whom input will be solicited.

- **INFORMED**: Those to be kept apprised of relevant developments. This is an FYI role. **NOTE**: *I's may not use the information to undermine the process. Unless someone is officially an I, consider not cc'ing them on emails. This is a good way to cut down on unnecessary emails.*

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Step 8: Take Action Now: Be Bold.

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GROWTH MINDSET

What have you learned? | What will you do differently?

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THANK YOU!

Q & A

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Tips for Inclusion

Align	Align mission and align INCLUSION commitment.
Share	Share perspectives of culture, religion, and race, ETC.
Invite	Invite other voices.
Examine & enhance	Examine & enhance company culture.
Follow	Follow criteria.
Analyze	Analyze data FREQUENTLY.
Lean	Lean into conflict and discomfort.

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