



## Designing Workshops on Diversity, Equity & Inclusion

Welcome to my course,  
**Design & Facilitate Powerful Workshops on  
Equity, Inclusion & Social Justice:  
Tools and Strategies to Accelerate Learning and Organizational Change**

In the first two months, we will focus on the principles of design. Please review this packet of handouts to deepen your understanding of many of the key concepts and techniques I will review in the videos and on the Q&A calls.

By actively participating in this section of the course, you can deepen your capacity to:

- Design meaningful, productive workshops on equity, inclusion, and social justice that motivate and skill-up employees and leaders to consistently do their part to achieve strategic organizational goals.
- Develop step-by-step trainings to advance the competence of all leaders and employees.
- Avoid common pitfalls and traps that undermine learning and transfer of skill to daily activities.
- Increase the success of workshops through comprehensive needs assessment and proactive strategies to engage resistance.
- Use innovative training activities to accelerate learning and behavior change.

I look forward to our journey together!

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## Self-Assessment: Effective Design and Facilitation Skills

**Directions:** Read each of the following and rate your current level of knowledge and skill in each of the five sections using the following scale.

**1 = Rarely    2 = Sometimes    3 = Much of the time    4 = Most of the time    5 = Almost always**

### **A. Designing training sessions:**

- \_\_\_\_\_ 1. I assess the learning needs of participants before I design the training session.
- \_\_\_\_\_ 2. I gather background data on the demographics and experiences of the participants before I design the training session.
- \_\_\_\_\_ 3. I use some type of conceptual model(s) as I design activities. (Examples: “What, So What, Now What,” Gibb: Who am I? Who are You? What are we going to do? How are we going to do it?” or the Experiential Learning Cycle: Do, Reflect, Analyze, Generalize, Apply.
- \_\_\_\_\_ 4. I write specific, realistic, and behavioral learning outcomes that are linked to the learning needs of participants.
- \_\_\_\_\_ 5. I write clear and understandable designs and lesson plans.
- \_\_\_\_\_ 6. I develop effective warm-up/icebreaker activities that leave participants feeling energized, engaged and motivated to learn.
- \_\_\_\_\_ 7. I sequence activities to teach foundational concepts and skills before more complex ones.
- \_\_\_\_\_ 8. I design activities that meet the varying learning styles of all learners.
- \_\_\_\_\_ 9. I effectively use a variety of learning methods and tools, including experiential learning, small group activities, journaling, media, role plays, etc.
- \_\_\_\_\_ 10. I create multiple opportunities for participants to teach each other in a participative, democratic learning environment.
- \_\_\_\_\_ 11. I design activities so they are inclusive of all participants across social group identities.
- \_\_\_\_\_ 12. I use the principles of Universal Design in all learning activities to create maximum accessibility to the material and activities.
- \_\_\_\_\_ 13. I develop useful handouts and learning tools that help participants both deepen their learning and apply the concepts and skills to their lives.

## **B. Facilitating training sessions:**

- \_\_\_\_\_ 14. I create learning environments that are safe, respectful, and challenging.
- \_\_\_\_\_ 15. I use effective listening and communication techniques, including clarifying, paraphrasing, open-ended questions, etc.
- \_\_\_\_\_ 16. I demonstrate empathy effectively.
- \_\_\_\_\_ 17. I use silence effectively.
- \_\_\_\_\_ 18. I use humor appropriately and effectively.
- \_\_\_\_\_ 19. I manage time effectively.
- \_\_\_\_\_ 20. I introduce activities and give directions well.
- \_\_\_\_\_ 21. I effectively teach key concepts, definitions, and terms as I process activities and facilitate discussions.
- \_\_\_\_\_ 22. I process activities using open-ended and closed-ended questions effectively.
- \_\_\_\_\_ 23. I use processing questions to move participants through the Experiential Learning Cycle to help them make meaning of activities and apply their insights to create change (Do, Reflect, Analyze, Generalize, Apply; or What? So What? Now What?)
- \_\_\_\_\_ 24. I effectively move discussions and activities along and keep the group focused and “on track.”
- \_\_\_\_\_ 25. I acknowledge and appreciate people’s participation.
- \_\_\_\_\_ 26. I summarize discussions and make transitions effectively.
- \_\_\_\_\_ 27. I encourage group members to participate and engage them in the process through my choice of activities and my facilitation style.
- \_\_\_\_\_ 28. I use “Connecting Language” that bridges one person’s comments to another’s.
- \_\_\_\_\_ 29. I effectively find some relevant point in participant comments, even those that seem way off the topic.
- \_\_\_\_\_ 30. I effectively help participants recognize assumptions and help them differentiate between observable facts and interpretations.

- \_\_\_\_\_ 31. If I believe someone is on a tangent, I can effectively acknowledge their point, and redirect the conversation back to the group's topic.
- \_\_\_\_\_ 32. I minimize how much I use the "telling" style, and maximize how often I pose questions or dilemmas to facilitate dialogue among participants.
- \_\_\_\_\_ 33. I am able to "relate in" and "see myself in the participants" to find compassion and make a connection with them, rather than judging them or distancing from them.
- \_\_\_\_\_ 34. I use self-disclosure and share feelings, thoughts, opinions, and personal experiences effectively.
- \_\_\_\_\_ 35. I easily "go with the flow" and am flexible with the agenda as I adjust to the needs of the group in the moment.
- \_\_\_\_\_ 36. I consider feedback and coaching from group members and co-facilitators.
- \_\_\_\_\_ 37. I can "meet the participants where they are" and not demand or expect them to be farther along in their understanding or skill development.
- \_\_\_\_\_ 38. I can easily stay in the facilitator role and not become a participant in the learning process.
- \_\_\_\_\_ 39. I effectively use my voice and nonverbal behavior to facilitate learning and engage participants.
- \_\_\_\_\_ 40. I effectively name and discuss group dynamics with participants in the moment and use them as "teachable moments" to facilitate deeper learning.
- \_\_\_\_\_ 41. I can "let go of the outcome" and "trust the process" knowing learning takes place even when I do not recognize it happening in the moment.

### **C. Facilitating with an Inclusion Lens:**

- \_\_\_\_\_ 42. I talk about the college's commitment to diversity and inclusion.
- \_\_\_\_\_ 43. I state that it is everyone's responsibility to help create a campus climate that is respectful and inclusive for all community members.
- \_\_\_\_\_ 44. I effectively discuss the common daily indignities and micro-aggressions that people from marginalized groups experience on campus.

- \_\_\_\_\_ 45. I effectively discuss specific behaviors and actions that help create an inclusive campus environment.
- \_\_\_\_\_ 46. I consistently demonstrate respect for all participants across privileged and marginalized group memberships.
- \_\_\_\_\_ 47. I pay attention to the multiple group memberships of participants and notice patterns of participation, including who's talking, who is quiet, who interrupts, who gets interrupted, who takes leadership, whose ideas "plop" or are ignored, etc.
- \_\_\_\_\_ 48. I notice what issues of diversity are discussed effectively and which ones are ignored or not addressed productively.
- \_\_\_\_\_ 49. I recognize and interrupt prejudice, stereotypes, and exclusionary group dynamics that occur in the session.
- \_\_\_\_\_ 50. I am aware of how people may experience and interpret comments and nonverbal behaviors differently based upon their cultural perspective, and their experiences in their multiple privileged and marginalized groups.

#### **D. Responding in "difficult dialogues" with an Inclusion Lens:**

- \_\_\_\_\_ 51. I effectively navigate discussions where group members are feeling and expressing deep emotions, including anger, sadness, fear, frustration, hopelessness, etc.
- \_\_\_\_\_ 52. I am able to be "in the moment" ~ fully present and focused on what is happening in the group and in myself during difficult dialogues.
- \_\_\_\_\_ 53. I effectively respond to participant behaviors I believe are distracting, including dominating, interrupting, side-tracking, side conversations, etc.
- \_\_\_\_\_ 54. I acknowledge comments which sound inappropriate or triggering.
- \_\_\_\_\_ 55. I engage people in dialogue when I experience one of their comments as inappropriate or triggering.
- \_\_\_\_\_ 56. I recognize that "resistance" and challenges from participants are often doorways to deeper understanding and learning for the group.
- \_\_\_\_\_ 57. I effectively navigate conflict and disagreement among group members.

- \_\_\_\_\_ 58. I respond effectively to challenges and engage “resistance” from group members without taking it personally or feeling deeply triggered.
- \_\_\_\_\_ 59. I can use triggering events as “teachable moments” for the group.

**E. My self-work as a facilitator:**

- \_\_\_\_\_ 60. I am aware of my biases, assumptions, and stereotypes for the full range of privileged and marginalized groups.
- \_\_\_\_\_ 61. I continually interrupt, reframe, and unlearn my biases, stereotypes, and assumptions about privileged and marginalized groups.
- \_\_\_\_\_ 62. I understand how my various privileged and marginalized group memberships impact how I am perceived and experienced by others.
- \_\_\_\_\_ 63. I understand how my various privileged and marginalized group memberships impact how I make meaning of situations, and then how I react/respond.
- \_\_\_\_\_ 64. I am aware of how my beliefs about “what is “effective” \_\_\_\_\_ has been influenced by my socialization and experiences in my multiple privileged and marginalized group memberships (i.e., facilitation, dialogue skills, conflict resolution, training, meeting management, supervision, advising...)
- \_\_\_\_\_ 65. I continuously self-reflect to examine my behaviors, assumptions, feelings, and attitudes and their impact on others with an Inclusion Lens.
- \_\_\_\_\_ 66. I continually seek and utilize feedback about my behaviors and attitudes from members of privileged and marginalized groups; and utilize their input to improve my practice.
- \_\_\_\_\_ 67. I am aware of my “early warning signals” that I am beginning to feel triggered.
- \_\_\_\_\_ 68. I am able to notice and navigate my own triggered feelings of anger, fear, stress, grief, etc., so that I do not “work my issues on the group.”
- \_\_\_\_\_ 69. I am aware of my common triggers and their intrapersonal roots.
- \_\_\_\_\_ 70. I actively do my work around my triggers: explore their roots; do my healing work; etc.
- \_\_\_\_\_ 71. I actively expand my understanding of issues of diversity, inclusion, and social justice.

## **6 Steps for Designing Workshops**

- 1. Needs Assessment**
- 2. Develop Learning Outcomes**
- 3. Brainstorm Learning Methods and Activities**
- 4. Develop a Tentative Outline**
- 5. Develop a Detailed Outline**
- 6. Prepare and Collect Session Materials:**  
  
**(Handouts and Worksheets, PowerPoint Slides, Videos, Supplies, etc.)**



## 1. Needs Assessment\*

- a. Gather information about the desired learning outcomes and purpose of the session(s) from the leaders of organization or whomever arranged for the training.
- b. Review the values, mission/vision, DEI statements, and recent strategic plan of the organization to identify the current organizational context for the workshop.
- c. Discuss recent trainings the group has experienced: topics, evaluations, degree of participation, common group dynamics, observable results, etc.
- d. Discuss how this session fits into the overall plan for training and development.
- e. Clarify if participation in the session is mandatory or voluntary.
- f. Review related job descriptions, as needed.
- g. Gather information about the learning needs of participants: number expected, experience/knowledge with the topic, attitudes towards this training session and topic, hoped for learning outcomes, preferred learning styles and methods, etc.
- h. Gather relevant demographic information about participants (age; gender identity; race/ethnicity; nationality; English proficiency ~ verbal, reading, and written; disability status; ~ physical, cognitive, learning, and emotional/mental; sexuality; socio-economic class background; hierarchical level and job function; level and type of formal schooling; religion/spiritual practice; immigration status; etc.).
- i. Clarify logistics of the session: date; start/end time; location; evaluation process; duplication of handouts; needed supplies; etc.
- j. Clarify logistics of the meeting space: meeting room and additional small group discussion spaces, as needed; audio-visual needs; internet capacity; types of furniture; preferred room set-up; meals & refreshments; etc.

### **Recommended logistics**

- Make sure the space for the session is large enough for people to move around for activities and has acoustics conducive for the small and large group dialogue and processing. Lecture style, unmovable seating or desks/tables between participants creates a barrier for open dialogue.

***\*For more information on needs assessments, see Appendix A, p 37.***

## 2. Develop Learning Outcomes: What do you want participants to be able to do differently after the training session?

### **There are two kinds of learning outcomes:**

- \* Content learning outcomes: the WHAT ~ major concepts, skills, knowledge, key points
- \* Process or Interpersonal learning outcomes: the HOW ~ how you want the participants to engage each other and feel so that they accomplish the content learning outcomes.

***\*For sample Content and Process Outcomes, see Appendix C, p 42.***

*\* While the CONTENT learning outcomes are key, the PROCESS outcomes, the means to the end of accomplishing the Content outcomes, are equally critical.*

### **a. Develop Content Learning Outcomes:**

- Research the topic until you have a solid grasp of the material you intend to include in the session.
- Gather relevant statistics, examples/personal stories related to the workshop topic.
- Brainstorm a full set of possible content learning outcomes.
- Arrange them in a scaffolded, sequential order.
- Prioritize them given the length of the session.
- Edit each content learning outcome so that it is specific and behavioral, and measurable if needed.

Examples of content learning outcomes for a basic, foundational session exploring issues of diversity, equity, and inclusion in organizations ~ During the session participants will deepen their capacity to:

1. Understand the organization's commitment to diversity, equity, and inclusion.
2. Understand the organization's expectation that all members help create and maintain an inclusive organization.
3. Recognize the "leadership case" for creating inclusive organizations that effectively meet the needs of the increasing diverse populations we serve.
4. Recognize the full range of differences among the people we work with and serve.
5. Engage in authentic, productive dialogue about common privileged and marginalized group dynamics in the organization.

6. Explore common attitudes, stereotypes, and behaviors that perpetuate marginalization and exclusion in the organization.
7. Explore how the dynamics of privilege and marginalization impact the success of employees and those we serve.
8. Identify your own membership in various privileged and marginalized groups.
9. Recognize how you may get perceived and treated in the organization based on your various privileged and marginalized group memberships.
10. Identify examples of recent progress towards creating greater inclusion and equity in the organization.
11. Deepen capacity to recognize and interrupt microaggressions and other exclusionary situations.
12. Use an *Inclusion Lens* to design and revise programs, policies, systems and procedures to create greater equity and inclusion.
13. Apply the tools, skills, and insights from the workshop in your daily work responsibilities.
14. Identify ways to continue to deepen your learning and capacity to create inclusive organizations.

#### **b. Identify Process or Interpersonal Learning Outcomes**

- Visualize how you want the participants to engage each other during the session.
- Imagine how you want the participants to feel during and at the end of the session so they accomplish the content learning outcomes.

Examples of process learning outcomes for a basic, foundational session exploring issues of diversity, equity, and inclusion in organizations:

Participants will:

1. Feel connected to the other participants; valued, respected, a part of the learning community.
2. Willing to take risks, be honest, be open to new ideas.

3. Comfortable and connected enough to share their experiences, thoughts, and feelings (maybe even attitudes).
4. Nudged and challenged enough to consider and explore new and differing perspectives.
5. Willing to engage in authentic dialogue across differences.
6. Willing to engage in respectful, passionate disagreements.
7. Energized to help create and maintain a respectful, inclusive organization.
8. Willing to do their part to notice disrespectful treatment, speak up, support others....

### **3. Brainstorm learning methods and activities:**

- a. Review the needs assessment information.
- b. Use both content and process learning outcomes as the framework to brainstorm activities.
- c. Consider the meeting space limitations and opportunities.
- d. Brainstorm learning strategies for each content learning outcome while also considering all of the process outcomes as well.
- e. Keep in mind your skill, knowledge, comfort level, confidence, and capacity as a facilitator.
- f. Interactive, experiential, and participant-centered learning methods respect the knowledge and experience of participants, and facilitate practical/applied learning.
- g. There are three primary types of activities:
  1. Facilitator to whole group: Focus for learning is on the facilitator or an activity they initiate.
  2. Facilitator to individual participant: Individual participants experience THE activity in a personal and unique way.
  3. Participant to participant: Participants learn from and with each other.

- h. It may be most effective to balance the learning activities across all three categories.  
Examples of each category:

1. Facilitator to group (facilitator centered): engaging short lecturettes, large group discussions and Q&A, videos, panels, demonstrations, personal stories, mind teasers, dramatic readings, etc.
2. Facilitator to individual participants (facilitator directed): self-assessments, worksheets, large group activities (Common Ground, continuums, forced choice activities), visioning activities, reflective writing, meditations, simulations, etc.
3. Participant to participant: small group discussions, small group activities, case studies, fish bowls, moving continuums, brainstorming, debates, skits/role plays, sharing personal stories and examples (Gallery activity), unstructured large group discussions, pick a question out of a hat, stations activity, etc.

#### **4. Develop a tentative outline:**

##### **a. Guiding principles**

1. Vary learning formats and methods, including:
  - Conceptual and applied learning
  - Reflective and interactive
  - Experiential and observing
  - Auditory and visual
  - Verbal and quieter
  - Physically active and not
  - Serious and playful
2. Consider timing needs
  - Build in a formal break every 1.5-2 hours.
  - Have participants engage each other or do an interactive activity every 10-20 minutes.
  - Plan for a physical or mental icebreaker activity after any major break or meal.
  - Avoid doing a visualization/relaxation activity after a meal or in the late afternoon.
  - Participants may have a shorter attention span towards the end of the session.
  - Participants need to reflect, process new information, "let it sink in," etc.
  - Build in time for questions throughout and at the end of the session.
  - Build in a "cushion"/extra time: things often take longer than planned.

**b. Organize session into three parts:**

- Act 1 = Creating the Container for Learning
- Act 2 = Body of the Workshop, and
- Act 3 = Conclusion

**Act 1. Creating the Container for Learning**

It is important to use the initial sections of the workshops to “create the container” for learning and effective engagement:

- **Create the learning environment** for authentic dialogue, self-reflection, and engagement (clarify organization expectations, negotiate learning community guidelines, discuss hopes and fears concerning the session, etc.) See below for sample guidelines.
- **Establish the norm of self-disclosure and personal story-telling. Possible approaches include:** Having participants share examples of when they have experienced marginalization in their lives, times they have acted (possibly unconsciously) based on stereotypes and prejudice; and times they have responded effectively to interrupt marginalization and create greater inclusion.

**a. Key design elements**

(see Appendix B, p 39. for a sample outline template)

- **Welcome participants** to the session
- **Introduce facilitator(s):** establish credibility; share pronouns
- **Land acknowledgement:** To learn more about how to include a respectful land acknowledgement specific to your location, visit:  
<https://usdac.us/nativeland>.
- **Purpose of session:** Why this session is important and how is it related to the organization’s mission and values; How participants will benefit from the session; How this session builds on earlier ones and how it fits into the overall training program; etc.
- **Learning Outcomes:** Content and Process
- **Outline** of session

- **Learning Guidelines** ~ Examples to consider using:
  1. ENGAGE IN OPEN AND HONEST DIALOGUE
  2. PARTICIPATE FULLY (@ COMFORT LEVEL +1)
  3. SPEAK FROM PERSONAL EXPERIENCE
  4. LISTEN RESPECTFULLY; SEEK TO UNDERSTAND; LISTEN HARDER WHEN YOU INITIALLY DISAGREE
  5. MOVE IN, MOVE OUT; ENCOURAGE OTHERS TO PARTICIPATE
  6. BE FULLY PRESENT
  7. BE OPEN TO NEW AND DIFFERENT PERSPECTIVES
  8. EXPLORE THE IMPACT OF COMMENTS AND BEHAVIORS; ACKNOWLEDGE INTENT
  9. TAKE RISKS: LEAN INTO DISCOMFORT; BE BRAVE
  10. RESPECT AND MAINTAIN CONFIDENTIALITY
  11. NOTICE AND SHARE WHAT'S HAPPENING IN THE GROUP, IN YOU
  12. RECOGNIZE YOUR TRIGGERS; SHARE IF YOU FEEL TRIGGERED
  13. TRUST THAT THROUGH DIALOGUE WE WILL REACH DEEPER LEVELS OF UNDERSTANDING
  14. ENGAGE THIS OPPORTUNITY!
- **Housekeeping information:** turn off cell phones, breaks, refreshments, location of restrooms, including an All-Inclusive restroom, etc.
- **Warm-up/Community-building activity** (examples below)
- **Introduce participants** (as time allows)

**b. Warm-up/ Community-building activity\***

~ The purpose of the warm-up activity is to have participants feel energized and motivated to learn, to give them an overview of the content of the session, and to help them feel connected, comfortable, and challenged enough to actively participate in the session. Examples of warm-up/ community-building activities:

- "How many of you have...." (ask questions that emphasize problems or issues that will be addressed in the workshop)
- Skit/role play/short media clip that highlights the content of the session
- Quizzes/assessments/inventories that assess current skill/knowledge level, needs and/or attitudes of participants regarding the content of the session
- "What problems/concerns/issues do you have regarding this topic?" or "What do you hope to learn in this session?"
- Present current statistics that demonstrate the problems that will be addressed in the session
- Share a personal story or testimonials related to the topic

- "What are the characteristics of an unproductive \_\_\_\_\_?"
- "What are the characteristics of a very productive \_\_\_\_\_?"
- Do a moving continuum or forced choice activity related to the topic
- Use a visualization that illustrates the problems or where they imagine the solution
- Play a Bingo/scavenger hunt activity using prompts that give an overview of the session content and offer opportunity to engage in brief, meaningful conversations

**\* For more sample Icebreakers, see Appendix D, p 44.**

## **Act 2: Body of the workshop** ~ Participants experience/learn skills, knowledge, tools, etc.

- a. Organize by "building blocks" ~ teach and scaffold foundational concepts and skills first, then next set of tools/knowledge
- b. Sequence lower-risk learning before higher-risk activities
- c. Debrief/process each activity. Consider using the 3-step technique: What? So what? Now what?
  1. What are your reactions, feelings? What was the impact of this activity? (What?)
  2. What happened? What did you observe/notice? (What?)
  3. How do you make sense of what happened? Make meaning of the experience? (So what?)
  4. How is what happened like what occurs in the organization? (So what?)
  5. What can you take away from this activity and apply to your role and responsibilities? (Now what?)
  6. What are you committed to doing? What are some next steps? (Now what?)
  7. How can you keep learning about this? (Now what?)
- d. Build in activities to apply learning to role/responsibilities



### Act 3: Conclusion of the session

- a. Review and summarize major points
- b. Build in time for participants to identify and share personal action steps
- c. Bring closure to the session
- d. Invite final comments from participants
- e. Re-emphasize the importance of what they have learned and how their actions in the future will impact others, the overall organization
- f. Thank the participants
- g. End the session
- h. Do an evaluation
- i. Stay around for conversations with participants

#### c. Assign tentative time frames to each activity

- Activities and discussions may take longer than planned
- See Appendix \_\_\_\_\_, for examples of time frames

#### d. Review the design with respect to content and process learning outcomes; ask colleagues for feedback

### 5. Develop the detailed outline for the session:

- a. It is very helpful to **develop a comprehensive outline** that is written at a level of detail that a colleague of similar skill and knowledge could use to facilitate the session.
  - 1. Identify all materials, audio/visual equipment, and room set-up needs
  - 2. Identify all preparation tasks; develop copy-ready handouts
  - 3. Include the overall purpose and learning outcomes for the session
  - 4. For each activity, write out the intended purpose, suggested timing, directions for any tasks, sample processing questions, key points to emphasize, materials needed, etc.
  - 5. Develop transition statements between activities
  - 6. Develop summarizing and closing comments
- b. Ask a few colleagues to **review your outline and to give you honest feedback**. Revise as needed. Consider “piloting” the session with a group of participants. Practice and rehearse as needed until you feel confident and comfortable as the facilitator. Consider having yourself video-taped during a practice or pilot session.

### c. Evaluations

1. Continuous evaluation: It is helpful to "take the pulse" of the session during and after most activities. There are a variety of ways for a facilitator to check the effectiveness of the learning activities:
  - "Read" the audience: attend to the nonverbals of participants
  - Listen to comments as participants discuss group tasks and at breaks
  - Ask the entire group how they are doing
  - Talk to individuals at breaks and during individual activities
2. End of the seminar evaluations
  - Verbal evaluations: A facilitator may choose to ask for public comments regarding the seminar. This technique is effective if one purpose of the workshop is to foster group development and to improve the quality of relationships among participants. In this case the following questions may be helpful:
    - How are you feeling as you leave?
    - What is one of your key learnings from this session?
    - What will you "take away" from this session?
    - What would anyone like to say to each other?
    - What have you appreciated about this group? this session?
    - What's one thing you are committed to doing differently?
  - Written evaluations: Participants are more likely to offer constructive feedback using an anonymous written or electronic evaluation. The following may be useful prompts:
    - Right now I am feeling...
    - What I learned about myself....
    - What were the three (3) most helpful parts of this seminar?
    - The three (3) things I want to remember from this session are...
    - Write down at least one (1) goal for what you will do after this seminar.
    - How will you use these skills in your daily work activities?
    - Three (3) things that I plan to do differently...
    - The activities I learned the most from were...
    - Suggestions for improvements I have for this session are...
    - Please comment on the facilitator's style, knowledge, and skills.
    - What additional information/topics do you want to learn more about?
    - Please add any further comments and suggestions.

- **Post-seminar evaluations:** Often it is helpful to gather evaluative feedback 2+ weeks after the session to measure how successful the participants were in applying the new knowledge/skills/attitudes in their lives. It is often useful to send out some additional articles and a personal note with the evaluation form. Consider "rewarding" those that take the time to fill out and return it.

## **6. Prepare and collect session materials/equipment:**

**(Supplies, Audio-Visual Equipment, Handouts and Worksheets, PowerPoint Slides, Videos, etc.)**

### **a. Useful **supplies** to have on hand:**

- Blank name tags
- Markers (non-chemical small; darker colors)
- Extra pens
- 3x5 cards
- Post-its
- Pads of chart paper
- Decks of playing cards
- Extra blank paper
- Chime

### **b. Audio-visual equipment to consider having available**

- Easel for chart pad
- Capacity to show a Power Point
- Lapel mics for facilitator(s)
- Hand-held mics for audience participation – mics are especially helpful to be inclusive of people with hearing impairments and/or whose English is a 2nd language
- Clicker to advance slides
- Capacity to show video clips with closed captioning if possible
- Capacity to play music

### **c. Guidelines for preparing **handouts and worksheets****

- For accessibility purposes, have at least one copy of the handouts in 18 font for those who would benefit from large print
- Translate the handouts into the primary language of participants
- Be mindful of the reading proficiency of participants as you develop materials

- Minimize jargon, slang, inaccessible terms, and acronyms
- Prepare materials so participants can review them with assistive technology, as needed
- Print only the handouts you will use in the session; plan to send out a full packet of materials electronically after the session

**d. Power Point Slides**

- Minimize how much text is on each slide
- Minimize jargon, slang, inaccessible terms, and acronyms
- Use colors that can be seen by participants (avoid light colors, red)
- Use at least a 32 font size for text
- Prepare materials so participants can review them with assistive technology, as needed
- Use graphics, quotes, and images that represent a range of identities and are free of stereotypes

**e. Preparing Charts, criteria to consider:**

- Use large and legible lettering
- Vary colors
- Avoid long passages/details
- Only highlight key words/concepts
- Number each item
- When using a chart pad, write on every other page to avoid any "bleeding through" of images from other pages
- Have same information in handouts or on slides
- Use a tab of masking tape to identify prepared pages in the pad for quick access
- If posting pages, turn up the bottoms and tape to wall until ready to use
- Be very careful to use correct spelling, avoid jargon, slang, acronyms, and abbreviations, etc.

**f. Videos: Criteria to consider** as you select video clips, graphics, images, etc.

- By group membership, who is/is not represented?
- How often are people represented?
- What roles are people in?
- What are people doing? With whom are they doing it?
- Are there any stereotypic or offensive representations?
- Balance images and names by race, gender, gender identity, nationality, etc., in graphics, activities, text, etc.

- Shift the traditional ways of depicting people based on privileged and marginalized group identity.
- Intentionally include images, text, etc., that subtly challenge stereotypes.
- Depict realistic images and situations.
- Depict an inclusive environment: show a balanced and reasonable mix of group identities.
- What is the placement/sequencing order of various people?
- What are the features/characteristics of those depicted?
- What language is being used (titles, adjectives, pronouns, etc.)?
- What feelings and attitudes are depicted or described?
- Does the lighting fairly represent all images?
- Scan the full breadth of all the media you are using: Is there a wide representation of group memberships across race, skin color, sex assigned at birth, disability status, gender identity, sexuality, socio-economic class, age, etc.

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

## **Design Considerations: Format**

**Length**: While clients want to offer trainings in 45 to 60 minute blocks, I have found it more effective to schedule workshops in 3+ hour or full day sessions.

**Number of sessions**: It is usually more effective to schedule a series of workshops over a period of a few months.

**Frequency**: Hold sessions every 4-6 weeks (or more frequently) to reinforce the organization's commitment to equity and inclusion. In addition, this schedule provides participants with time in-between sessions to practice and apply their learning.

**Pre-work**: Give participants 2-3 tasks to complete before each session to increase learning. Examples of pre-work include reading articles, completing self-assessments, and gathering examples or feedback to share in the session.

**Homework**: Assign 2-3 next steps/practice activities as homework to reinforce the learning and help participants apply the tools in their daily activities. Examples of homework include: Participating in follow-up dialogues with colleagues; practicing the session tools with colleagues; attending related programs in the organization and community; researching promising practices among peer institutions; retaking a self-assessment; and discussing ideas and insights with their supervisor.

## Effective Learning Activities

### 1. Style of Interaction of Activities

- a. **Facilitator to whole group:** focus for learning is on the presenter or an activity they initiate
- b. **Facilitator to individual group member:** individual participants experience activity in a personal and unique way; presenter-directed
- c. **Member to member:** participants learn from and with each other

### 2. Examples of techniques in each category

<b>Facilitator to group</b> <u>Facilitator-centered</u>	<b>Facilitator to individual</b> <u>Facilitator-directed</u>	<b>Member to member</b> <u>Member-directed</u>
short lecturettes large group Q&A movies panels demonstrations stories/jokes overheads debates	assessments inventories individual questions visualizations Gallery activity talking during breaks worksheets	small groups fish bowls brainstorming unstructured large group discussions skits case studies role plays open panels of participants

It is useful when trainers use techniques from all three categories to provide as much variety as possible throughout the session.

### 3. Tips for when and how to use different training techniques

- **partner/share-pairs:** more opportunity and time to share reflections and feelings; build connections and sense of trust and bravery; time to prepare before sharing in small or large group; generally preferred by reflective learners and introverts; move people around so they have different partners throughout the session; start with a “high 5 buddy” pair and have that same partnership reconnect a few times during the session
- **buzz dyad:** Partner participants with someone they don't know well; give them 2 minutes to talk about whatever is NOT being talked about, i.e., ideas, reactions, solutions, feelings, etc. Then ask for short report outs from each dyad.

- **buzz and brainstorm:** Ask each dyad to discuss/list 2-3 ideas; after 2+ minutes, have the group brainstorm their ideas as you chart them. Then group can review and discuss.
- **triads:** groups of three participants for discussions and skill practice; if skill-building, one is observer as other two practice new skill; after feedback session, participants switch roles.
- **individual reflection time:** gives members a chance to reflect and organize thoughts before sharing in small or larger group; gives those less likely to compete for air time a chance to prepare; a time for members to be more honest with themselves/to reflect and tune into their feelings/inner thoughts; consider having them keep a journal both in and outside of the seminar; gives presenter time to regroup and prepare for next activity; give a clear time limit; allow them to move about the area; wander among participants in case they have individual questions/comments
- **small groups:** way to "warm-up" members for further participation; get more ideas because there is more "air time"; fosters creativity; develops trust/respect among peers; gives a lot of members the chance to "shine"; acknowledges expertise/knowledge of members; solicits more ideas in less time; encourages less assertive members to talk; use for project development, case studies, values discussions; start with smaller numbers in groups and build to 5-8; wander among groups and "check-in"; assign a group leader if needed; if reporting back, have each group a few ideas so that last group has some left to share; encourage several people from each group to report out
- **large group discussions:** use when want to discuss or debrief an activity that all members experienced; use to gather new/different ideas; to process feelings; to give members a chance to share their ideas and experiences and gain respect/recognition from peers; to develop speaking skills and confidence among members; get more participation; engage disagreements; allow members to ask facilitator any questions; develop feelings of a "team"; trainer needs to have good group facilitation skills; set clear guidelines for process for participation; monitor individual's use of air time; use open-ended questions; see "SAGA" model for examples of processing questions
- **stations activity:** Identify 4-10 topics you want ideas/input on. Put one topic at the top of each piece of chart paper. Divide participants into small groups and assign each group 1 chart. Give them 3+ minutes to brainstorm and list ideas; then move each group to another "station," and ask them to review what's there, and brainstorm other ideas. Can also ask them to put a check mark by ideas they like.



- **to explore the pros/cons of an idea in more depth:** Give participants time to think about at least 1 pro and 1 con for the idea. Then go around the circle and:
  - Each person shares 1 positive outcome of this idea
  - Then each person shares a possible pitfall or draw back
  - Variation: Form dyads or triads and ask them to generate 3 pros and 3 possible drawbacks without discussing them. Then have groups report these into the room.
- **perspective taking:** Form small groups and assign each 1 perspective to represent. Give them 10 minutes to discuss and be ready to share:
  - What issues are important from this perspective?
  - What might be important concerns to consider?
  - What are some ideas and solutions for moving forward?
- **pick-a-question activity:** Ask each person to write a question or issue on a piece of paper that they want discussed by the group. Collect these and put into a basket. Ask for a volunteer to pick out a piece of paper (without looking at it) and respond/answer in the large group. Then invite others to comment. Repeat the process.
- **continuums:** Ask participants to move to a place along the continuum from 0-10 that reflects their feelings, attitudes, perceived skill level, perceived knowledge level, readiness, etc. Ask them to turn to 1-2 people to talk about what is behind the number they chose. Facilitate conversations among the participants. Often useful to start the large group discussions from the middle, then move to both ends.
- **self-assessments:** increases self-awareness; excellent "motivation grabber" to recognize gap between goal and current state; personalizes concepts/information; gives members specific examples to discuss/refer to; helps members tune into their feelings/thoughts; gives participants a common language; allow members to NOT disclose information if they choose; do assessment right before a break to allow extra time for those who read/write more slowly; be wary of bias and implicit assumptions in packaged assessments
- **brainstorming:** energizing; fun; solicits many different ideas very quickly; sets tone for participation; increases creativity of responses; do not allow critique of ideas until all thoughts are expressed; be a "gate keeper" and encourage all participants to offer ideas
- **Power Point slides:** best for directions, graphics, cartoons, short quotes, mind teasers, and key phrases; keep legible, use at least 32 font; use darker colors

- **video clips:** can help participants focus on emotions; makes concepts more real to them; excellent for visual learners; helps people to experience things through another's perspective; keep them short; do an energizer before; give participants an "advance organizer" of what to look for/major concepts/overview
- **worksheets:** give participants "fill-in-the-blank" worksheets/outlines to take notes on during lecturette/group discussion; can be structured with a specific amount of blanks, or open-ended for personal note-taking
- **simulations:** large group activity that simulates "real life"; helps participants practice new skills, knowledge and concepts; can be used as motivation grabber or to assess current performance level
- **visualizations:** members close eyes and get into a relaxing position as facilitator has them go through some relaxation exercises and then reads descriptions that participants try to visualize; encourage them to "focus on their feelings"; gives participants chance to personalize information/issues; slows down pace; stimulates feelings and different points of view; simulates a "real life" situation; take care not to put people to sleep; avoid using this activity after a meal or in late afternoon; keep it short; know that some people have trouble relaxing and visualizing
- **demonstrations:** teach new skills; lower anxiety of members; role modeling; have members experience something so that they can then tune into their feelings/thoughts for discussion; establishes a criteria for success; helps members see more clearly what you expect of them: use a step-by-step method; move slowly; break down into smaller parts; allow time for processing and questions; use visual aids to complement demonstration; have a step-by-step procedure for them to follow along
- **skits/role plays:** excellent tool to promote active/participatory learning if members are involved; good for visual and experiential learners; helps people see things "through the eyes of others"; loosens people up; fun activity; actors experience feelings of characters; excellent way to teach reverse roles; presenter needs good processing skills; use "SAGA" model to process; give clear instructions; encourage group to avoid oppressive comments/behaviors
- **fish bowl:** have one group in the center of a circle of observers; the inner group can discuss a topic/do a demonstration/role play; give observers clues for what to look for; allows some members to personally experience an activity while others can closely observe; can add an empty chair for outer circle to come share an idea or comment before returning to the outer circle; excellent tool to point out issues/problems for processing; simulates a "real" situation; use SAGA model to process

- **lecturettes:** keep to under 5-minutes; giving new information; need to cover material quickly; difficult material to grasp; need a break from participatory activities; want to make very clear points; keep lectures as short as possible; use effective visual aids to highlight key points; handout a worksheet for participants to follow along and take notes
- **case studies:** excellent activity to help participants to apply new knowledge/skills; give each small group the same or different "real life" scenario/situation to solve/work through; have groups report back to large group or share with another small group
- **panels:** use when you want to display a variety of views/examples; shows breadth and depth of a subject; provides group members with a variety of role models; give clear guidelines for process; have an assertive moderator; consider having participants be the members of the panel; have an "empty chair" to represent views from people who can't join the panel; allow time for participants to ask questions/dialogue with panel
- **open panel:** have open seating on a panel and allow participants to join the panel and present their views, challenge other panelists, etc.
- **debates:** excellent tool to show differences in perspective/opinion; an effective challenge to break down absolute right/wrong thinking; helps members analyze/crystallize own values/beliefs; have speakers of equal skills or participants may not be able to fully appreciate all points of view; screen speakers; give them clear guidelines for the debate; have an assertive moderator; consider having participants be the members of the teams; challenge them to take sides that are different from their current perspective
- **reaction panel:** get volunteers to be panel members who give personal reactions to audience after a group activity, such as: lecture; debate; movie; etc.
- **group questions:** small groups develop questions for facilitator/panel members; takes pressure off of individuals to come up with creative and thought-provoking questions
- **analogies and metaphors:** use to emphasize a point/concept; gives visual learners a mental image; use in conjunction with visual aids; can use same theme to weave throughout session
- **jokes:** be careful when choosing your material; always have joke related to content of seminar; screen material for language, stereotypes, concepts, and inferences which might be offensive
- **psycho-social dramas:** similar to a role play or skit, but facilitator stops action at a climax and processes intense feelings of participants; have participants develop possible solutions to the skit in small groups
- **interviews:** interview "real" people or participants in role plays or panel

- **soliloquy:** one-person role play/skit that reveals his/her innermost thoughts to the audience; can be done during a skit if other actors "freeze"
- **body sculpture:** participants use nonverbal/pantomime behavior to express feelings/reactions to a stimulus from facilitator; have them add to the "sculpture" one at a time and explain the meaning behind their actions; can have participants take their position at the same time then scan room for noticings and insights
- **games:** use as review or pre/post-test; Family Feud; Jeopardy; What's My Line; Trivial Pursuit; Password; Hollywood Squares; Wheel of Fortune; \$10,000 Pyramid; Beat the Clock; Bingo; etc.
- **collages:** participants make a collage out of magazine pictures/words that have some related theme; have them explain collages to group
- **dramatic reading:** participants and/or facilitator reads powerful short passage, statistics, quotes, etc., as participants read along silently
- **individual quiet reading:** participants have alone time to read/reflect on powerful passage, quotes, statistics, etc.; process reactions in small or large group
- **costumes:** will add excitement to role plays/skits; very effective if facilitator makes a surprise appearance after a break in character
- **paper bag skits:** participants develop role plays/skits along a specific topic and are given a bag of props to use
- **mystery activities:** give participants a task to accomplish without giving them the purpose or any clues to the expected outcome
- **individual coaching:** facilitator wanders among participants who are engaged in individual or group work; offers personal comments and coaching as needed.
- **charting:** use large and legible lettering; vary colors; avoid long passages/details; only highlight key words/concepts; number each item; when using a newsprint pad write on every other page to avoid any "bleeding through" of images from other pages; have same information in handouts; use a tab of masking tape to identify prepared pages in the pad for quick access; if posting pages, turn up the bottoms and tape to wall until ready to use; be very careful to use correct spelling, avoid jargon, slang, acronyms, and abbreviations, etc.

## More Design TIPS

1. The body can only withstand between 30-45 minutes of seated activity.
2. Build in a stretch break/or activity every 30-45 minutes.
3. Build in a 5-10 minute break every 1.5-2 hours.
4. People need an excuse and "permission" to be playful and have fun. They generally appreciate the chance to let go and have fun, though they may be hesitant at first because it's not "cool" or "adult".
5. Facilitator should model/demonstrate/give an example of each activity/task for participants before they are asked to do it.
6. In self-disclosing activities, facilitator should model a bit deeper/more risky disclosure than is expected from participants.
7. Always avoid public embarrassment or involuntary participation by an individual in front of the group.
8. In self-disclosure activities, provide a way by which individuals can "pass" and choose to not verbally participate in activity; possibly serve as a process observer.
9. Be extremely aware of the physical abilities and disabilities of participants and create opportunities to participate for all.
10. Most people like engaging, creative teaching techniques.
11. People generally appreciate the chance to get to know others and share with them on a more personal level.
12. Use strength-based approaches: Start with sharing strengths, successes, productive skills; then explore then explore gaps in skills, unproductive past behaviors, etc.
13. In skill practice activities, minimize/avoid any possibility of failure or unproductive frustration unless it is a deliberate aspect of the learning experience.
14. Participants generally appreciate the chance to reflect/journal and get to know themselves better, and then share their new awareness with others.
15. Most people enjoy the opportunity to talk with others, though some will need to feel comfortable and connected before they may take the risk to participate.
16. Vary learning activities & offer options for participation to meet the needs of both introverts and extroverts.

17. Provide refreshments that are nutritious and high energy foods. Provide alternatives that don't contain sugar, chemicals, caffeine, etc. If providing a meal, assess the needs for food allergies; it is good practice to offer vegan, vegetarian, gluten-free, and dairy free options. Be aware of when Ramadan is as well as any other day that involves fasting.
18. Consult a comprehensive calendar of holidays and religious holy days before scheduling workshops.
19. Avoid doing a visualization/relaxation activity after a meal or in the late afternoon.
20. Always do an energizing activity after major breaks or meals.
21. Participants will generally have a shorter attention span towards the end of the seminar.
22. Develop a list of resources to include in the handout packet(videos, books, articles, blogs, pod casts, conferences).
23. Avoid jargon/slang/acronyms/buzzwords. Use a very simple layperson's vocabulary. Explain every unclear word or concept used by participant.
24. Before you develop a workshop, research the topic thoroughly. Read books/articles, interview experts, do a survey, etc., UNTIL you find that any additional information seems repetitious.
25. ALWAYS keep in mind that the purpose of ANY workshop is to EMPOWER others with the necessary skills, self-awareness, knowledge, attitudes, and courage to create greater equity, inclusion and social justice in their spheres of influence
26. Refer to current events and relevant work-related topics as examples. Avoid sharing your personal politics.
27. Be authentic as you share personal stories/information. Moderate how often you share about yourself in balance with time for group sharing. Share stories and examples you have told before or have worked through emotionally. It is not our role to work our issues on the group.
28. Use analogies, metaphors and examples to make key points.
29. Build in time for action-planning and evaluations.
30. Make sure all jokes, stories and analogies are relevant and in good taste and free of bias and stereotypes.
31. Never read lengthy passages or definitions to audience.
32. Put all directions in writing on slides, in handouts, on carts, etc.

33. Put together a TRAINER'S MAGIC BOX of extra materials and supplies: pens, pencils, tacks, chemical-free markers, name tags, extension cord, tape, chalk, white-board eraser, scissors, glue, safety pins, straight pins, aspirin, ibuprofen, string, staples, stapler, post-it's, paper clips, highlighter, Kleenex, Band-aids, prizes for games/contests, objects for fiddlers, etc.
34. Arrive in time to test out the AV equipment, prepare all charts, and be ready to meet and engage participants as they arrive.
35. Plan to stay afterwards to engage participants as they leave.
36. In a pre-session email, gather information about learning needs for accessibility, food requirements, etc. Talk individually with participants with apparent disabilities to talk through any activities you think may need to be adjusted so you collaboratively explore possible ways to shift to increase learning and participation.
37. Research and be prepared to start the session with a Land Acknowledgment of the original custodians of the location of the session.
38. Put your pronouns on your name tag, share them as you introduce yourself, and invite others to do the same.
39. Consider addressing these in the workshop set-up:
  - Leave your titles at the door
  - Ask if anyone is in a direct supervisory relationship with another participant; if so, ask them to negotiate how they can both be authentic and participate
40. If a senior leader is welcoming participants and framing the session, coach them to speak from personal experience, share their commitment to equity and inclusion, connect the session to the organization's mission, and thank the participants.
41. If leaders are attending the session with other members of the organization, coach them to model the vulnerability, authenticity, and skills they want from other participants.

## Learning is Progression: HOW TO TEACH SKILLS

1. **Advance organizer:** Give an overview; what to look for; purpose of skill; provide an outline of key topics/concepts to follow; move from general to specific.
  - **How does this apply to your work?** Mission of the organization?
  - How this will **help you be successful** in your work?
2. **Building blocks:** Break down the skill into smaller/manageable parts; go over in detail; build on earlier information; compare/contrast; give examples of each part using examples that are relevant to participants.
3. **Show the whole picture:** Slowly model/demonstrate the entire skill; have participants identify each part of the skill; show inter-relatedness of all parts.
4. **Apply information/practice skills:** Participants practice the skill in low-risk environment with observer; receive peer feedback; facilitator wanders among participants and coaches as needed; best if participants first practice a situation already modeled by facilitator; use "successive approximation" strategies.
5. **Process reactions, feelings and results of practice:** Participants discuss feelings and reactions to taking the risk of practicing a new skill; facilitator needs to relate in and acknowledge honest comments about difficulty of task.
6. **More practice:** Facilitator emphasizes the need for patience, persistence and practice; bike riding analogy. Practice more in the session and receive peer feedback.
7. **Facilitator holds space** for questions and reflections.
8. **Homework:** Facilitator suggests/solicits a variety of ways participants can keep learning and applying new information/skill after the workshop.



## Steps for Training Employees: One-on-One

1. Ask the employee how they learn best?
  - by observing you do it?
  - by reading about how to do it?
  - by listening to you describe how to do it?
  - by trying to do it themselves?
2. Explain your role as the trainer:
  - To teach you the process/task so you can be successful, and
  - Coach you as you try it out the first few times
  - To be a resource as you have questions or have problems
3. Explain the task/process; have them read through the directions, if applicable
4. Show employee how to do the task as you explain it again
5. Have the employee talk you through how to do the task; you complete each step as they tell it to you
6. Set the employee up to complete the task as you coach them through each step
  - Coach them if they begin to do it incorrectly
  - Give positive feedback as they successfully complete small steps
7. Observe as you have the employee complete the task again
  - Instead of telling the employee how to do it again, ask them questions to help them think through the next steps in the process
8. Ask the employee for other questions they have
9. Give the employee clear instructions for what you want them to accomplish next
10. Let them know that you will stop back in a few moments to check on them to see if they have any more questions
11. When you stop back to check in on the employee, explore their questions and offer encouragement and positive feedback. Let them know they can contact you if they have any more questions or concerns.

## Strategies for Giving Instructions & Debriefing Activities

### Giving instructions ~ Key elements:

- Tell participants that you will be giving them detailed instructions.
- Ask them to wait to begin until you are finished.
- Give an overview of the task/activity: Purpose; how it relates to other information; what they will get out of participating; etc.
- Cover the following details (put these in writing either on chart paper or in a handout): Format (individual work, small group discussion, etc.), how they will be divided into smaller groups, time frame, location, materials needed, level of expected participation, what they will need to do at the end of the task, etc.
- Assign a small group leader, if needed
- Model the activity or give an example, as needed
- Invite questions for clarity
- Begin activity

### Processing Questions to Debrief Activities

**Processing questions for each level of "SAGA" or *Share, Analyze, Generalize, Apply*** (Materials adapted from a presentation by members of The Ohio State University Counseling Center, Columbus, Ohio, 1979.)

- a. **Share:** Share reactions, feelings, and impacts from the experience
  - What were your reactions to this activity?
  - How are you feeling right now?
  - What are your thoughts about all of this?
  - What overall thoughts or comments do you have?
  - Take a moment and write down your reactions and feelings about this activity.
- b. **Analyze:** Reflect on the various aspects of the experience
  - What happened during this activity?
  - What were your responses when....?
  - How did the time factor affect you?
  - How did you feel when \_\_\_\_ happened?
  - What did you do when \_\_\_\_ happened?
  - What happened when...
  - What kinds of conflict existed and why?
  - How many felt \_\_\_\_? Why? What did you do?

c. **Generalize**

- What principles came out of this activity?
- So what does all this mean about effective \_\_\_\_\_?
- So, who can make sense out of all of this?
- What can we conclude about effective \_\_\_\_\_?
- So what are the elements of effective \_\_\_\_\_?

d. **Apply**

- What does all of this mean for you in your roles and responsibilities?
- What are the things that you want to do differently?
- What are 3 things that you will "take home" from this experience?
- Take a few minutes and write down 5 things you want to remember.
- How could we do \_\_\_\_\_ differently?
- What do you want to talk with your supervisor about \_\_\_\_\_?
- If a similar situation occurs in the future, how do you want to handle it?
- What do you plan to do as "homework" to prepare yourself to better handle these situations?

**Closed-ended Questions:** Closed-ended questions are asked in a way that they elicit a ONE WORD response, usually yes or no. Examples:

- Do you feel angry?
- Don't you think this would be a good idea?
- Is it really bothering you that much?
- Was he really devastated?
- You're not going to do that, are you?
- Are you thinking about confronting her?

Closed-ended questions often "lead" a person to an answer or response. They can be helpful when trying to suggest or test out a feeling or idea. They often are less effective techniques because they narrow the person's focus and limit possible responses.

Words that often begin a closed-ended question can include: Are, Do, Did, Is, Have, Has, Don't, Were, Where, Was, You're, Can, Could, Would, Should, Will, When, Who, What is + a qualifier (ex: The best or the worst).

## Open-ended Questions

Open-ended questions leave the other person a lot of room to answer the question in their own way. They often make people think about their answers. These questions put the responsibility for forming the focus of the discussion on the other person. EXAMPLES:

- How are you feeling about this?
- What are your reactions? Thoughts?
- What do you want to do?
- How are you affected by this?
- How did they react? Feel?
- What are you going to do?
- What have you thought about doing?
- Help me understand what you mean by \_\_\_\_\_.
- Tell me more about what you mean.

Words that often begin an open-ended question can include: What, How, Why, Tell me more, Help me understand. If you use WHY questions, some people may feel that you are criticizing them. EXAMPLES:

- Why did you do that? (Help me understand what your thoughts were when you did ...)
- Why do you feel that way? (Tell me more about how you feel \_\_\_\_\_.)

**Pauses** ~ While it may feel challenging to pause and let the group be in silence, there are many advantages to using pauses effectively:

- shows a transition
- gives participants a break, time to reflect, catch-up
- adds pressure to participate
- captures attention
- diminishes distracting behaviors
- emphasizes a point
- creates anticipation
- keeps facilitator from dominating
- gives you time to think
- slows down the pace

When designing a workshop, indicate where pausing may be particularly useful to learning.

## Processing Questions to Debrief Case Studies, Role Plays, Demonstrations, etc.

- Use the following questions to reflect on the situation:
  - What might be **your range of feelings** as you pan/experience this situation
  - What are the **central group memberships** involved? The key privileged and marginalized groups? (There are usually more than a few...)
  - How might different **people** be **feeling**? What are their possible **unmet needs**?
  - What **attitudes, assumptions, and behaviors** do you hope to explore in the follow-up conversation? (i.e., What was said or done that you feel needs further attention?)
  - What do you **hope to accomplish** in this follow-up discussion? Your hoped for destination? (i.e., Interrupt disrespectful/exclusionary comments/behaviors, invite others to increase their awareness of the impact of their comments/actions, build relationships for future dialogues, leave them feeling whole, do no harm, support those impacted by the actions/comments...)
- How could you start the dialogue by first sharing what you **PANNED** what you observed and noticed in yourself or the situation? (Just the facts, no assumptions, judgments or conclusions)
- How could you begin the dialogue by **ASKING** a question or two?
- How could you effectively **INTERRUPT** the unproductive dynamics?
- How could you respond by **RELATING IN** to begin the dialogue?
- How could you engage others and begin the conversation by **SHARING** about yourself: An experience or story, your feelings, the impact you're experiencing in the moment...
- What additional approaches might be useful in this situation?
- What could be done to minimize the chances that similar situations occur in the future?

## References

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## Appendix A: Sample Questionnaire for Designing a New Workshop

**Directions:** Choose one specific training session you want to design and facilitate. Complete this worksheet on a computer so you can more easily make changes and edits.

**A. Title or focus of the training session**

**B. Purpose of the session:** Why is this an important topic for these participants? How will participants benefit from this session? How will the organization benefit from this session?

**C. Potential participants attending the session**

- Role/function in the organization?
- How many?

**D. Identify the demographics of the group** on key social group identities, such as: perceived and/or stated biological sex, gender identity, gender expression, race, national origin, sexual orientation, age, job function and hierarchical level in the organization, religion/spirituality, socio-economic class background, etc. Note: Use your best “guesstimate,” no need to survey the participants at this point.

**E. Learning outcomes:** What do you want participants to KNOW and be able to DO differently after the training session? How do you want them to engage and feel during the session?

**F. Anticipated Length of session**

**G. Current Skill/Knowledge of participants:** Identify the current level of knowledge and skill of participants with respect to the Learning Outcomes, e.g., do 1/3 of the participants have a moderate level of skill already? while the other 2/3's are at a very basic level? Or are there several participants with significant knowledge and skill, while most (80%) are new to the position or topic?

- H. Preferred Learning Styles** of participants, e.g., experiential/kinesthetic/applied, conceptual/abstract, auditory, visual, etc. What have been effective learning methods in the past with this group?
- I. Identify needs for accessibility of learning materials** and activities (for participants with disabilities who are visually impaired, hearing impaired, or have mobility dynamics, or learning disabilities; for participants who are English Language Learners; for participants who do not read or write English at a 12<sup>th</sup> grade level, etc.)
- J. Past sessions:** If trainings on similar topics have been offered in the past, what are the strengths of the content and design that you would want to build upon? Were there any concerns during or after past trainings?
- How, if at all, did the session(s) teach about issues of diversity, equity, and inclusion? and emphasize the participants' role/responsibility to help create and maintain an inclusive, respectful organization for all members and clients?
- K. Connection of this session to the overall training program:** How does this session fit into the rest of the training & development program? (e.g., where does it fit in the schedule? What knowledge and skills have been covered in previous sessions?)
- L. Current organizational culture and climate:** What recent organizational initiatives and strategic plans may be relevant to this workshop? What recent critical incidents in the organization or local community may be important to consider as you design and facilitate this training? What is the overall climate, culture, and morale with respect to diversity, equity, and inclusion? Are there any relevant team or group dynamics among anticipated participants that may be important to consider as you design and facilitate? How effectively do supervisors and managers set clear expectations for productive behavior and performance as well as hold people accountable to meet these expectations as well as transfer learning and skill from the workshop to their daily work activities?

## Appendix B: Sample Draft Training Session Outline

Title of Session:

Date of draft:

1. **“Creating the Container”** for the session
  - a. **Senior leader welcomes** participants to the session
  - b. **Facilitators welcome** participants, **introduce** themselves, and **share their pronouns**
  - c. Facilitators do a **Land Acknowledgement** and honor the original custodians of the land on which the session is occurring.
  - d. **Purpose of session:** Why this session is important; How participants and the organization will benefit from the session; How this session builds on earlier ones and how it fits into the overall training & development program; etc.
  - e. **Learning Outcomes:** Intended Content and Process Outcomes
  - f. **Flow/Agenda** of session, including anticipated time of each activity
  - g. **Learning Guidelines**
  - h. **Housekeeping information:** Location of All-Inclusive bathrooms, cell phones and computers, breaks, refreshments, etc.
2. **Warm-up/Community-building activity(s):** Activity that gets the participants engaging each other AND the content of the session)



3. **Content of session:** Skill/Knowledge to be learned. Use this chart to sketch out the order of activities and the learning outcomes for each. Note the anticipated time and materials/AV needed.

Activity	Learning Outcome(s) addressed	Anticipated time needed	Supplies, handouts, Audio-Visual needs

4. **Some components to consider as you select your activities and scaffold learning:**

- Activity to deepen feelings of bravery and trust ANS begin to discuss core concepts, such as: bias/prejudice, group memberships, privileged and marginalized groups, and common privileged and marginalized group dynamics
- Activity(s) to identify the breadth of “differences that make a difference”
- Activity(s) to explore common privileged and marginalized group dynamics
- Activity(s) to identify multiple privileged and marginalized group memberships
- Activity(s) to begin to recognize microaggressions in the organization
- Activity(s) to explore ways to interrupt and effectively respond to microaggressions
- Activity to practice analyzing policies, practices, programs, and services with an Inclusion Lens.
- Action Planning Activity(s)

In addition to the details in chart above, it will be helpful for you to think through the following items for each activity:

- Set-up tips
- Directions to give participants
- Suggested processing questions
- Options and variations to consider

## 5. Summary

- a. Key points to summarize content of session; Link back to Learning Objectives and Purpose of session
- b. Possibly, how this workshop provides the foundation for upcoming sessions

## 6. Action planning/Next steps: Time for participants to identify ~

- a. How they will apply their new knowledge and skills in their job responsibilities
- b. What additional “next steps” will help them keep learning, give them the support they need, etc.

## 7. Closure and evaluations

### Facilitator Notes

1. Review the draft of the design as you consider: How do the planned activities successfully provide **opportunities** for the participants to **deepen their capacity** on each of the intended **Learning Outcomes**?
2. What, if any, **pre-work** might you consider to help prepare participants to make the most of this session? What email message will accompany the pre-work? From whom should this be sent?
3. What, if any, **homework** will you encourage participants to complete to facilitate transfer of learning to the work environment?
4. What **room set-up** will best support learning?
5. What **audio-visual** equipment is required?
6. What **handouts** will you use in the session? Send out afterwards in a fuller packet of resources?
7. What **supplies** will you need in this session?

## Appendix C: Sample Content and Process Learning Outcomes

### Overall learning outcomes for the session: Content and Process Outcomes

***Note: While the CONTENT learning outcomes are key, the PROCESS outcomes, the means to the end of accomplishing the Content outcomes, are equally critical.***

#### **Examples of CONTENT learning outcomes ~ Deepen foundational capacity to:**

1. Understand the organization's commitment to diversity, equity, and inclusion.
2. Understand the organization's expectation that all members help create and maintain an inclusive organization.
3. Recognize the "leadership case" for creating inclusive organizations that effectively meet the needs of the increasing diverse populations we serve.
4. Recognize the full range of differences among the people we work with and serve.
5. Engage in authentic, productive dialogue about common privileged and marginalized group dynamics in the organization.
6. Explore common attitudes, stereotypes, and behaviors that perpetuate marginalization and exclusion in the organization.
7. Explore how the dynamics of privilege and marginalization impact the success of employees and those we serve.
8. Identify your own membership in various privileged and marginalized groups.
9. Recognize how you may get perceived and treated in the organization based on your various privileged and marginalized group memberships.
10. Identify examples of recent progress towards creating greater inclusion and equity in the organization.
11. Deepen capacity to recognize and effectively interrupt microaggressions and other exclusionary situations.
12. Use an *Inclusion Lens* to design and revise programs, policies, systems and procedures to create greater equity and inclusion.
13. Apply the tools, skills, and insights from the workshop in your daily work responsibilities.
14. Identify ways to continue to deepen your learning and capacity to create inclusive organizations.

## **Examples of PROCESS outcomes for a foundational DEI session:**

1. Feel connected to the other participants; valued, respected, a part of a learning community.
2. Have their ideas, comments and feelings heard and considered in the session – they have a voice.
3. Comfortable and connected enough to share their experiences, thoughts, and feelings (maybe even attitudes).
4. Effectively nudged and challenged to consider new and differing perspectives.
5. Energized to help create and maintain a respectful, inclusive organization.
6. Willing to do their part to create a more inclusive organization.

## **Sample Learning Outcomes for Workshops on Specific Areas of Diversity, Equity and Inclusion**

After participants have successfully completed a full day+ Foundational Training Workshop, it may be useful to provide ongoing opportunities to deepen their cultural competencies on a variety of individual and intersecting social identities, including race, culture, ethnicity, and skin color; sex assigned at birth; gender identity and expression; socio-economic class; formal schooling; hierarchical level; disability status; national origin, immigration status and citizenship; religion, spirituality and faith; sexual orientation; age; size and appearance; and other dynamics of inclusion and marginalization in the organization.

The following **outlines a set of common learning outcomes** for designing these 3.5-4+ hour sessions.

- Discuss their socialization experiences related to this topic (What they observed and “learned” about these identity groups, stereotypes and early messages, experiences of privilege and marginalization, and examples of inclusion.)
- Identify and discuss current terms and language, as well as key historical dynamics and current context.
- Discuss examples of marginalization, exclusion, and privilege in organizations and in local communities.
- Practice responding effectively to common microaggressions.
- Identify examples of practices, policies, services, and programs that are more inclusive and support the success of all clients and members of the organization.
- Set personal learning goals.
- Identify next steps to increase inclusion in their sphere of influence.

It is important to bring in other voices to add to these conversations. Powerful learning methodologies include: Inviting a panel of current staff and clients to share their experiences; using video clips that highlight examples of marginalization and inclusion in organizations; and reading anonymous, generic examples of exclusion gathered from employees and clients.

## **Appendix D:** **Sample Icebreakers / Team-Building Activities**

### **1. Why use icebreakers and team-builders?**

- to foster acquaintanceship: help people get to know each other better
- increase feelings of comfort
- develop feelings of connectedness with others
- develop a feeling of trust
- break down walls/masks/barriers/territoriality
- help participants to understand and appreciate the differences among people in the group
- foster energy and enthusiasm
- to "get the blood moving" again
- serve as a "clearing technique", helping participants to forget about other issues and focus on the session
- provide an "advance organizer", an overview of the next topic or the purpose of the session
- increase personal awareness of current skill/knowledge level and need to learn session material
- set the tone for the workshop: engagement; bravery; authenticity; etc.
- to "grab" the attention of participants (motivation grabber)

### **2. Principles for using team-builders/icebreakers**

- have activity somehow relate to topics of workshop
- use more physical activities at beginning and after any break
- start with lower risk activities and build up to higher risk ones
- always model/give an example before the activity
- model enthusiasm and energy
- avoid physical contact or always give an easy out to participate without contact
- encourage laughter
- vary the membership of groupings and the size of groups
- use dyads and triads for more authentic sharing
- always process key points of activity to show relevance to overall session

### **3. Examples of low risk activities**

- a. Introduce your partner: Dyads interview each other with several specific sentence stems and report back to the group.
- b. Change five(5) things: Partners turn back-to-back and alter their appearance in five ways. They turn to face each other and try to guess the changes.
- c. Mirrors: Partners take turns imitating/"mirroring" the nonverbal and verbal behavior of the other.
- d. Off-balance: Partners hold hands and try to form as many different balancing positions that are very "off-balance".
- e. Make a machine: small groups have to use their bodies to make a moving machine and demonstrate it for the group.
- f. Shield: Have participants draw an empty coat-of-arms or a box and fill in 4-6 segments with words or pictures as they respond to the facilitator's sentence stems.
- g. Mind-teasers: have participants say aloud 10 times: hop, then ask "What do you do at a green light?" then say white, and ask, "What do cows drink? Finally say roast 10 times, then ask, "What do you put in a toaster?"

## Appendix E: Inclusion 101 Training Guide BUILDING AN INCLUSIVE, RESPECTFUL CAMPUS COMMUNITY

Note: There are so many useful activities to teach about issues of inclusion and social justice. In this document, I have outlined many of the ones I have found to be especially effective with traditional aged college students, staff, and faculty. Many of these may be familiar to you ~ they have been used, adapted, and shared over the years. Unfortunately, I do not know the original creators of some of these activities. I am grateful to all those who have come before so that we may keep building on their creative work!

### HIGH-LEVEL OVERVIEW OF DESIGN

#### Overall learning outcomes for the session: Content and Process Outcomes

***Note: While the CONTENT learning outcomes are key, the PROCESS outcomes, the means to the end of accomplishing the Content outcomes, are equally critical***

#### **CONTENT learning outcomes, foundational capacity to:**

1. Recognize the breadth of differences on campus
2. Recognize that we all have many group memberships
3. Understand that privileged and marginalized groups exist
4. Recognize privileged and marginalized group dynamics
5. Engage in authentic dialogue about common privileged and marginalized group dynamics on campus
6. Identify their multiple privileged and marginalized group memberships
7. Engage in authentic dialogue about experiences of microaggressions and other exclusionary situations on campus
8. Interrupt disrespectful/exclusionary treatment on campus
9. Recognize opportunities to create greater inclusion proactively

#### **PROCESS outcomes for the session:**

1. Feel connected to the other participants; valued, respected, a part of a learning community
2. Have their ideas, comments and feelings heard and used in the session – they have a voice
3. Comfortable and connected enough to share their experiences, thoughts, and feelings (maybe even attitudes)
4. Slightly nudged and challenged to consider new and differing perspectives
5. Energized to help create and maintain a respectful, inclusive campus community
6. Willing to do their part to notice disrespectful treatment, speak up, support others...

### **Facilitating Notes:**

\* Lean much more towards facilitating the discussion and dialogue among the participants, and less towards lecturing, teaching, and presenting modes of learning...while the content outcomes are important in this session, the process of participants engaging each other and learning from each other is more important than their “getting” the concepts and tools perfectly. Setting a tone for how to live in an inclusive community and laying the conceptual groundwork will help them in the next part of their learning journey as they take courses, participate in meetings, attend workshops/programs, etc.

**\* Be prepared to shift the logistics of some activities if participants are living with a visual, hearing, or mobility disability.**

## **List of Activities**

### **1. Welcome**

### **2. Icebreaker/Warm-up activity**

- Categories
- and/or BINGO

### **3. Learning Guidelines**

### **4. Activity to deepen feelings of safety and trust AND begin to discuss core concepts, such as: bias/prejudice, group memberships, privileged and marginalized groups, and common privileged and marginalized group dynamics**

- Concentric Circles
- Or Core Group discussion

### **5. Activity to identify the breadth of “differences that make a difference”**

- Common Ground Activity

### **6. Activity to explore privileged and marginalized group dynamics**

- Card Activity
- Or Let Me In!
- Summarizing common privileged and marginalized group dynamics: Input or large group discussion



**7. Activity to identify multiple privileged and marginalized group memberships**

- Self-assessment Activity

**8. Activity to begin to recognize common privileged and marginalized dynamics**

- Gallery Activity

**9. Activity to explore ways to respond and intervene to create greater inclusion**

- Small group discussions and report outs
- Role plays

**10. Action Planning Activity**

- Individual reflections to identify next steps for continued learning and ways to create inclusion on campus

**11. Closure Activities**

- Button Grab Bag
- Closing Circle

## DETAILED LESSONPLAN

### 1. Welcome

**Time needed:** 3-5 minutes

**Welcome participants**

**Review learning outcomes, agenda/flow and logistics of session**

### 2. Icebreaker/Warm-up Activity(s)

#### Categories

#### **Purpose**

- An active icebreaker to warm up the participants
- A low-risk activity to begin to introduce the concept of group membership

**Time needed:** 15-20 minutes

#### **Instructions**

- Stand in the center of the circle of participants
- Call out a category you are a part of
- Invite anyone who also is a member of that group to move quickly across the circle and to find a new place in the circle (like musical chairs)
- The last person to find a space in the circle is “it” and stands in the center and continues the process by calling out another category
- Continue this process until about 20+ have been called out
- Call an end to the activity
- Suggested processing questions:
  - \* What did you notice during this activity? How is this like what you and others experience on campus? (invite 4-5 different responses)
  - \* How are people treated if they are considered to be a little too “different?” (invite several responses)
  - \* How does it feel to be in the center? When does this happen in people’s lives?
  - \* Imagine what life would be like if we were to move towards differences, if we valued and sought out people who were different from us...

## **BINGO**

### **Purpose**

- An active icebreaker to warm up the participants
- A low-risk activity to facilitate authentic dialogue among participants, to increase feelings of connection and comfort
- Introduce the key learning outcomes of the session

**Time needed:** 15-20 minutes

### **Preparation**

- Create a customized BINGO handout where each of the prompts/questions relates directly to the learning outcomes of the session (use 6 or 9 prompts, depending upon time available)
- Bring enough prizes so many of the participants can “win”
- Possible prompts/questions:
  1. How are you feeling about being here? What do you hope to discuss in this session?
  2. Who are you? And what are some of the ways you already work to create a respectful, inclusive campus community?
  3. Why do some people feel nervous when talking about issues of diversity and inclusion?
  4. Talk about your passion for creating an inclusive campus community. Where does it come from?
  5. What do you think it feels like to be considered a little “too different” on this campus? What comments and treatment might they experience?
  6. Describe a time you noticed someone being treated with disrespect and you spoke up to create greater inclusion.
  7. Describe a time you were treated with disrespect and someone else spoke up to create greater inclusion.
  8. What are some diversity issues that you know a lot about? What are some you don’t know as much about?
  9. Identify 10+ groups that get treated with disrespect on campus and in society.
  10. Identify 10+ groups that are given a high social status and treated with extra respect and privilege on campus and in society.
  11. Discuss 10 things that everyone on this campus deserves to experience and feel.
  12. Discuss 10 things that no one on this campus should ever have to experience or feel.
  13. Identify where you get stuck around issues of diversity and inclusion ~ what do you want to know more about? or know how to handle more effectively?

### Instructions:

- Post these directions on a chart or PPT slide: Find someone to talk with and choose a topic to discuss from one of the squares. Initial each other's sheet, then find a new person with whom to discuss a new topic. When you have ALL 6/9 of the boxes filled in, yell BINGO! And come get a prize! then go back and keep helping others win BINGO.
- Model how to begin the activity with a person.
- Ask for any questions.
- Start the activity.
- After 1/3 of the people have gotten prizes, give the group a 1-minute warning to complete their current conversation.

### Suggested processing questions

- How are you feeling now compared to when we started BINGO? and what do you think helped you shift? (others have the same issues or feelings I do; I'm not alone; I feel more connected to people; we had honest conversations; I realized everyone here wants to create an inclusive environment....)
- Note: You can take the time to discuss a few of the questions, like: Why are some people nervous to talk about issues of diversity? Or, you can transition to the next activity.)
- Transition: The prompts and questions in the BINGO are an overview of what we'll be discussing in this session. For the next activity...

## 3. Establish Learning Guidelines

### Learning Guidelines/Norms

#### Purpose

- Invite participants to discuss what Learning Guidelines will help them learn and engage in authentic dialogue
- Review key Learning Guidelines

**Time needed:** 5-10 minutes

#### Instructions

- State: As in most meetings or programs, this discussion will work best if we all follow some Learning Guidelines/Norms
- State: Please take a moment and individually review the list of Learning Guidelines, and  
\* Choose 2-3 that you think will be particularly useful in this discussion whether on the list or any others
- Share Pair: After about a minute, put people into pairs and ask them to share the 2-3 Guidelines they each felt would be useful in this session
- Large group: Ask for 5-6 people to talk about a learning guideline and why they feel it would be useful in the discussion

- Transition: Ask if there are any others that people want to highlight? And then ask if everyone will work to engage others within these guidelines.

### **Suggested List of Learning Guidelines**

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

## **4. Activity to deepen feelings of bravery and trust AND begin to discuss core concepts**

### **Concentric circles (or Share Pairs)**

#### **Purpose:**

- To engage in authentic dialogue
- To deepen feelings of trust, bravery, comfort, connection
- To share stories that illustrate core concepts: prejudice/bias, group memberships, privileged and marginalized groups, discrimination, unlearning prejudice/liberation, being an ally/speaking up for social justice

**Time needed:** 30+ minutes

#### **Set-up: Move the group into 2 concentric circles**

- We're going to do an activity where you'll talk with different people about diversity issues
- Please count off in 2's: 1,2,1,2.... all the ones come for a circle and then face outwards
- All the two's come stand in front of someone you may not know as well
- OR please find a partner and one of you stand/sit in an outer circle facing inward, and the other face them to form an inner circle

**Directions:**

- State: For the next 2 minutes have a two-way conversation with your partner about the following: (Note: Consider starting at #3 if you feel the group is ready; most groups begin to get restless after 4 share pairs)

**1. Talk about a time in your life when you felt that you mattered ~ when you were a part of a group or situation where you felt included; important; valued, connected to others; you were respected for who you are**

**NOTE: Give a brief example from your own experience**

- Debrief: Let's get a few "pop-outs" about what you talked about...Who will share a quick story of a time you felt valued/you mattered (3-5 is plenty). What happened that helped you feel you mattered? You were respected and valued?
- Next round: Will the inner circle move one person to your right to find a new partner?

**2. Talk about a time you felt you were treated less than, by someone or a group because of their attitudes towards some difference you had...or they perceived you had....**

**\*What happened...how did you feel?**

**\*What did you do?**

**\*What, if anything, did you or someone else do to intervene and create more inclusion, understanding, stop the disrespectful treatment?**

**NOTE: Give a brief example from your own experience**

- Debrief: Gather 4-5 stories; then ask the whole group to collect a few more brainstormed phrases for each of the following:
  - \* What were your feelings when you were treated less than?
  - \* What did you do?
  - \* Raise your hand if someone else spoke up to intervene?
  - \* What are some of the differences people have that tend to get treated as less than in society? on campus?
- Next round: Will the outer circle move one person to your right to find a new partner?

**3. Think about a time you used to feel uncomfortable, uneasy or biased about a certain group, but something happened and you SHIFTED to feel more accepting. What was the turning point in your awareness? What helped you to be more open minded and let go of your assumptions and discomfort a bit?**

**NOTE: Give a brief example from your own experience**

- Debrief: Gather a few stories, if possible; OR ask, “What helped you shift?”  
\* Transition: We all can tell stories of what helped us shift we can continue to create those opportunities for ourselves, as well as invite others to be open to shifting their perspectives and learned biases.

- Last round: Will the inner circle move one person to your right to find a new partner?

**4. A time you noticed something disrespectful and spoke up to create greater respect, inclusion...to try to educate...to stop the negative treatment.**

- Debrief: Ask for a show of hands of how many people spoke up. You can ask for a few examples and/or transition: It is critical that we all continue to broaden our ability to recognize disrespectful moments and to choose courage and speak up to create greater inclusion for our next activity....

**Core Group discussion**

- Instead of using the format of Concentric Circles, you can have participants discuss the same prompts in small groups
- Form “Core Groups” by asking participants to find 2-3 other people who they don’t know very well AND who are different from them in some way.
- NOTE: Plan to use these Core groups at least 1-2 more times during the session OR in follow-up activities.

**5. Activity to identify the breadth of “differences that make a difference” on campus**

**Common Ground activity**

**NOTE:** There are many versions of this activity. The facilitator can call out the group memberships, have the participants initiate which groups they call, or a hybrid version.

**Purpose:**

- Participants experience the breadth of differences that exist on campus
- Participants broaden the number of differences that they pay attention to
- Group development of comfort, connection and greater safety

**Time needed:** 30+ minutes

**Set-up:**

- Move the group into a large standing circle
- Transition: As we continue to get to know each other, we know that we are each unique individuals, AND, at the same time, we each are members of many different groups.

### Directions:

1. Anyone can call out a group, but ***you have to be a member of that group***
2. When someone calls one out, they take a big step into the center
3. Anyone else who also is a member of that group can join them in the center of the circle.
4. Notice who's in the inner circle, who's in the outer circle
5. Then the inner circle steps back to rejoin the full group
6. A couple of rules: Even if you are a member of a certain group that is called, you ***don't have to step in if you're not wanting to share*** that with this group. Please just pay attention to your thoughts and feelings about why you aren't sharing that with the group. **2<sup>nd</sup> rule: No outing!** If a group is called, and you notice that someone who you think belongs to that group didn't move in, you can't point that out or call them out. Everyone gets to decide if and when they move into the inner circle. NOTE: Give an example that is low risk: who didn't get enough sleep last night, who is a student...
7. As we do this activity, notice your thoughts, feelings, and reactions, as well as what groups get called.

### Demonstrate:

\*Here's an example ~ Anyone who grew up in a city... (suburb...a rural area...)

\*Any questions?

### Begin the activity

**NOTE:** Track how relevant the groups are to your purpose. *If they start to get too light or superficial*, model some that are some of the "differences that make a difference" to how people get seen and treated in society and on campus.

- You can even intervene half-way through and prompt: "Now let's focus on more of the "difference that make a difference" to how people get seen and treated in society, and on campus."
- Track which group identities have not been called, and find ways to introduce them if they group doesn't. Common ones that may not get called: educational background, sexual orientation, gender identity and expression, size/appearance, race...
- Give a "last call" when you sense the activity is winding down

### Debrief: Turn to a new partner and discuss; then discuss as a large group

1. What did you notice during this activity? About yourself? About us as a group?
2. Any differences that exist in society or on campus that we didn't name?
3. What, if any, impact did doing this activity as a group have on you?

**Transition:** It is critical to student success that we create a campus environment where people from all types of groups are a part of our community; and feel respected, valued, and appreciated for their differences, even if we might disagree with each other.



## 6. Activity to explore privileged and marginalized group dynamics

### Card Activity

#### **Purpose:**

- An interactive experience to feel what it's like to be an in-group or out-group; less physical than "LET ME IN!"

**Time needed:** 15+ minutes

#### **Set-up:**

1. Enough playing cards for 1/participant
2. A range of cards: Ace, K, Q, J, 10.....8....6.....5....3...2

#### **Directions:**

1. I'm going to give each of you a playing card
2. Now, without looking at your card, trade it 5 times with others. Make sure you do not know what card you have after your last trade
3. (When everyone has finished trading) Now hold the card out in front of you so others can see it, but you can't
4. Now, stand up and come into the center of the room
5. For the next 3-minutes we are going to talk to each other. You can talk about anything you'd like, and there's only one rule:  
\*You must treat each other based upon the value of their playing card: Ace is high, then K, Q, J, 10 = the higher cards get better treatment; 2, 3, 4, 5, 6 get not very good treatment; and the middle cards get so-so treatment
6. Any questions?
7. Begin the activity

NOTE: Facilitators participate. This activity will probably "make the point" after 2-3 minutes.

#### **Debrief** prompts (Can be discussed in pairs first, or as a large group)

1. What card do you think you have? Why?
2. What happened? What did you notice during this activity?
3. What were you feeling during the activity? Did your feelings change over time?
4. What were some of the subtle ways people were treated less than?
5. What were some of the ways people were given more attention and better treatment?

**Making Meaning, possible prompts:**

1. What about this activity felt familiar?
2. What feelings or moments do you relate to?
3. What has it been like when you were in an “in-group?” privileged group?
4. What has it been like when you were a member of an “out-group?” marginalized group?
5. What are some of the in/out groups that existed in your high school? on campus?
6. What could be some of the exclusionary dynamics that might occur on campus?
7. What can you do if you observe, experience, or hear about some exclusionary comments or actions?

**Optional small group share: Ask each person to share 3 stories with their partners ~**

1. One where they experienced being treated like a LOW CARD
2. One where they experienced being treated like a HIGH CARD
3. One where they experienced being treated like a MEDIUM CARD

**NOTE: Debrief in large group**

**LET ME IN!!!** (15+ minutes with the debrief)**Purpose:**

- A chance to physically experience being in the in-group or the out-group

**Time needed:** 15+ minutes

**Directions:**

1. I need 6-7 volunteers to come form a circle in the middle of the room. This activity could involve some physical movement.
2. Please hold hands
3. NOTE: Unobtrusively whisper to the circle of students to “Don’t let anyone join your group”
4. Now I need a volunteer to come up and join their group
5. NOTE: Monitor the level of physicalness to make sure no one gets in a position to be hurt
6. INVITE others to come and join the circle until 8+ people are participating
7. STOP the activity once enough has happened to discuss (3-4 minutes)

**Debrief, possible prompts**

1. What happened? What did you notice during this activity?
2. What strategies did you use to try and join the group?
3. How and why did you keep people out?
4. What were you feeling as you tried to join the group?
5. What were you feeling as a member of the in-group?

**NOTE:** Invite responses until some of the key points get made:

- In-groups tend to keep others out
- Groups get stronger, more group-identified, when “different others” try to join
- Individuals may want to let people in, but the group can put pressure to keep them out
- People may try many different, escalating strategies to join the group: asking permission, asking politely, gently trying to pull hands apart, trying to force their way in, breaking in by going into the center of the circle, etc.
- Some people give up
- Some don’t even try to join
- Some may try to form their own group, but are usually still focused on the original in-group
- Feelings of joiners: increasing frustration, powerless, anger, indifference
- Feelings of in-group: camaraderie, confusion, guilt at colluding, solidarity, discomfort, irritation at those that let others in, enjoying the in-groupness/power, etc.

## **Input/Large Group Discussion on Privileged and Marginalized Group Dynamics**

**Time needed:** (10+ to 30 minutes)

### **Purpose:**

- To summarize the key points of common Privileged and Marginalized Group Dynamics
- An opportunity for conceptual and reflective learners to make meaning of the experiential activity

### **Set-up:**

1. Engaging lecture: reference the handout and PPT slide

2. Large group discussion, suggested prompts:

- So, what do people who have a High Card/are in the Inside circle get just because of their privileged group identity? How do they get treated? What gets assumed about them? What privileges and types of access do they get?

- And people with a low card/not in the Inner Circle, how do they get seen and treated, just because of their marginalized group membership? What do they miss out on? Have to work extra hard to get?

- **NOTE:** As a summary, you can reference the handout/PPT slide as you transition to the next activity

## 7. Activity to Identify Multiple Privileged and Marginalized Group Memberships

### Self-assessment Activity: Identifying Your Multiple Privileged and Marginalized Group Memberships

#### **Purpose:**

- Participants reflect on their group memberships on 20+ different categories of difference
- Reflect on the impact of their combined privileged and marginalized group memberships

**Time needed:** 20-30+ minutes

#### **Directions:**

- Explain how the worksheet lists 20+ categories of difference and then the privileged group(s) and the corresponding marginalized group(s) within a U.S. societal context
- Ask participants to individually think about their own group memberships in each of the listed categories, and
- For each category of difference, CIRCLE their group membership
- For some they may circle something on both sides, give an example: private high school AND 1st generation college student
- Invite them to write-in their specific group membership, if it is not listed
- And to add more categories of difference that impact how people get seen and treated on campus
- Then count up their # of groups in each column
- And notice their feelings, reactions, insights
- As people are finished reflecting, ask them to make some notes individually about the following questions:
  1. Which of your group memberships do you:
    - \* Rarely think about? Why?
    - \* Sometimes or often think about? Why?
  2. Reactions as you look at full balance among your multiple group memberships?
  3. Which 2-3 group memberships seem to impact how you get seen or treated ~ more positively or more disrespectfully?
- Move people into groups of 2-3 to share their reflections to the above prompts
- Large group debrief

## 8. Activity to begin to recognize common privileged and marginalized group dynamics

### Gallery of Stories

#### **Purpose:**

- Participants read/hear examples of what people from marginalized groups have experienced on campus
- Broadens and deepens understanding of current privileged and marginalized group dynamics on campus
- Creates empathy, energy to create greater inclusion

**Time needed:** 40-60 minutes

#### **Set-up:**

- Materials needed: 2 pages of blank copy paper/participant; pens
- Distribute paper, pens as needed
- Give directions
- Give participants 5+ minutes to write their examples

#### **Directions** (post on chart/PPT slide):

Write about TWO actual situations or patterns of uninclusive and/or disrespectful treatment that marginalized group members experience on campus. Write one (1) example/piece of paper. May have happened to you, or you witnessed it, or heard the story about from a credible source:

- Recent situation or pattern of experience (within last 2-3 years)
- Occurred on campus or in the local community
- Anonymous/Generic: NO NAMES or key references
- You can share one or more of the following:

- \* What is/was the situation?
- \* By group membership ~ who were the main players and their central group memberships?
- \* How did you feel? Others feel?
- \* What was the impact of this situation on you? Others?
- \* What, if anything, did someone do to create greater inclusion?

#### **Create Small Groups**

- Ask each person to trade their examples with 5 different people
- Then ask them to form small groups of 6-8, mixed by group membership

**Directions for Small Groups**

- In a moment, people will read the stories aloud to the small group
- One person reads 1 story, then the next person in the circle, and so on
- Do not talk about the stories, just keep reading them
- Silently as you listen, begin to notice your feelings and reactions, and any patterns you notice
- One person collect up the stories as they are read, so a facilitator can come around and pick them up
- We will circulate these stories a couple of times so that each small group will read about 40+ stories before we talk about them
- Any questions?

**Debriefing in Small Groups**

- After 10-15 minutes, end the reading of the stories
- Ask group members to discuss the following prompts among themselves (post on chart/PPT slide)

\*In your small group share and discuss:

1. What are your feelings and reactions as you hear these stories?
2. What's 1 example that stood out to you and why?
3. What impact could this have?
4. What are other examples that these reminded you of?

Note: This activity is called the "Gallery" because we used to post the stories on the wall and have participants silently read them, and then discuss.

## 9. Activity to explore ways to respond and intervene to create greater inclusion

### Small group discussions and report outs

**Time needed:** 20+ minutes

**Directions:**

- Keep people in the same small group and invite them to choose a few stories and discuss the following:
  - What could someone do to create greater inclusion ~
    - \* in the moment
    - \* after the moment
    - \* proactively
  - Large group discussion

### Role plays

**Time needed:** 30-40+ minutes

**Directions:**

- Form mixed small groups of 5-6 people
- Have them choose 1 situation from the Gallery activity or another that they anticipate occurring on campus
- Give them 5 minutes to prepare a 2-minute demonstration/skit for the large group that shows how someone could effectively respond to the situation to create greater inclusion that would do one or more of the following:
  - \* Stop the uninclusive, disrespectful behavior
  - \* Help the participant(s) see a differing perspective
  - \* Support those impacted
  - \* Re-affirm the campus values of social justice and inclusion

## 10. Action Planning Activity

### Action Planning ~ Individual reflections

- Ask participants to individually think about/write down 3-5 specific actions they will take to help create greater inclusion on campus
- A variation: Have them write what they will STOP doing, START doing, and CONTINUE doing
- You can have them do a share-pair, small group, or the button grab bag to share their ideas

## 11. Closure Activities

### **Button Grab Bag**

#### **Purpose:**

- To share action steps with others, bring some closure, and have participants share motivational comments

#### **Set-up:**

- Need at least 1 button/participant (can order from Donnelly-Colt, Syracuse Cultural Workers)
- Quickly pass them out

#### **Directions**

- Ask participants to have a quick one-on-one conversation with several different partners, and to keep moving around until you bring them back together as a group
- Tell them that with each partner, please share 1-2 action steps they plan to take on campus to create greater inclusion, and also trade their button
- Then go talk to another person, and trade your button
- NOTE: Depending on the time available, people may have 3+ exchanges.
- Call the group back, and ask folks to reflect on the button they now have.
- You can then mention that everything happens for a reason, and messages come to us from all places...and so this button today may have a personal how message for you...
- Ask for 5+ people to quickly share in the large group about what message their button is bringing them at this moment...and also mention that for some, the message may not yet be clear, but in a few days, they might get some insight....

### **Closing Circle**

- Gather participants into a closing circle (standing or chairs)
- Invite their closing reflections, possible prompts:
  1. As I leave, I feel...
  2. What I have appreciated about this group...
  3. What I've appreciated about our session together is....
  4. As a member of this community I will...
  5. One learning I'm taking with me is...
- Share your closing reflections and appreciations



## **Appendix F: Guidelines for Selecting Quotes**

**When choosing which quotes to use in the design, ensure the following:**

- Quotes are audited for any stereotypic phrases/images or possible negative differential impact on different group identities, etc.
- There is a balanced representation of diversity within discreet sections of the course
- There is a balanced representation of diversity across the entire design

**Directions:**

**This is a list of quotes that are in a design you're reviewing. Apply the above guidelines. What, if any, suggestions would you make? And why?**

"Wisdom is everywhere. Uncommon wisdom is the ability to apply knowledge in unique ways. When we take all that you know and all that we've learned, we can achieve uncommon things." Ken Thompson, CEO Wachovia Bank.

A learning organization is one that allows people at all levels, individually and collectively, to continually increase their capacity to produce results they really care about. Peter Senge, The Fifth Discipline

"Learning something new every day means a better experience for customers, endless possibilities for employees, and incredible value for shareholders. The Wachovia's learning philosophy is founded on three key principles." – Ron Garrow

"Learning's importance to Wachovia resonates deeply in our values – showing how we respect and value the individual, support personal excellence and accountability and deliver on our core brand idea of uncommon wisdom." - Ron Garrow

"Talk about learning content with other learners and experts. When we take all that you know and all that we've learned, we can achieve uncommon things." Ken Thompson, CEO Wachovia.

"For every problem, there is one solution that is simple, neat, and wrong." H.L. Mencken

"Wisdom is the reward you get for a lifetime of listening when you have preferred to talk." – Doug Larsen

"Learning is directly proportional to the amount of fun you are having." - Bob Pike