THE CENTER FOR transformation and change

Using an Inclusion Lens in Crisis Management:
Creating Equitable and Inclusive Policies, Practices, and Procedures

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For complimentary access to Kathy's books and other resources:

Free Resources and Future Events
www.drkathyobear.com/events
www.drkathyobear.com/resources
(Group Identity Cards template)

…But I'm NOT Racist! Tools for Well-Meaning Whites
www.drkathyobear.com/imnotracist
www.drkathyobear.com/racebook
(Supplemental resources, including Book Club Guide)

In It For The Long Haul: Overcoming Burnout
and Passion Fatigue as Social Justice Change Agents
www.drkathyobear.com/selfcarebook   *www.drkathyobear.com/selfcare*

Turn the Tide: Rise Above Toxic, Difficult Situations in the Workplace:
https://drkathyobear.com/wp-content/uploads/2016/01/Turn-the-Tide-Kathy-Obear.pdf
www.drkathyobear.com/book-worksheets
www.drkathyobear.com/book-gift
(Animated video and outline for a Lunch & Learn)

Engagement Guidelines

1. OPEN AND HONEST COMMUNICATION

2. ANTICIPATE YOUR IMPACT ON OTHERS BEFORE YOU SPEAK

3. PARTICIPATE FULLY (COMFORT ZONE +1); EXPECT DISCOMFORT IF LEARNING

4. SPEAK FROM PERSONAL EXPERIENCE

5. LISTEN RESPECTFULLY; LISTEN TO LEARN

6. SEEK TO UNDERSTAND; EXPECT DISAGREEMENT & LISTEN HARDER

7. SHARE AIR TIME: MOVE IN, MOVE OUT

8. BE FULLY PRESENT

9. BE OPEN TO NEW PERSPECTIVES

10. EXPLORE IMPACT; ACKNOWLEDGE INTENT

11. EXPECT PEOPLE TO LEARN AND GROW; DON'T FREEZE-FRAME OTHERS

12. TAKE RISKS; LEAN INTO DISCOMFORT; BE BRAVE; ENGAGE

13. RESPECT AND MAINTAIN CONFIDENTIALITY

14. NOTICE/DESCRIBE WHAT YOU SEE HAPPENING IN THE GROUP, IN YOU

15. RECOGNIZE YOUR TRIGGERS; SHARE IF YOU FEEL TRIGGERED

16. TRUST THAT DIALOGUE WILL TAKE US TO DEEPER LEVELS OF UNDERSTANDING AND ACCEPTANCE

17. ENGAGE & EMBRACE THIS OPPORTUNITY; WE WON'T BE FINISHED

Meeting & Classroom Guidelines ~ Your Intentions & Guidelines

➢ To create environments where everyone feels heard, involved, supported, and respected

➢ To create productive and engaging environments for the open and respectful exchange of ideas, perspectives, and opinions

➢ To promote respectful dialogue, fair discussion of issues, and mutually respectful conversations

➢ Engage in respectful discourse

➢ Create a positive, collegial atmosphere

➢ Demonstrate mutual respect for the comments and views of all

➢ Speak and act in ways that do not disrupt or interfere with the learning or work of others.

➢ Explore controversial issues through open dialogue and respectful deliberation.

➢ Consider and explore new ideas and perspectives

➢ Express opposing ideas in a respectful manner

➢ Consider the potential impact of your comments and actions

➢ Accept responsibility for the overall welfare of the entire group

➢ Engage in respectful disagreement: Disagree with a person's ideas without attacking their humanity

➢ Respectfully address unproductive and exclusionary behaviors from other students

Panning/Observing Group Dynamics with an Inclusion Lens

Use the following prompts as you use an Inclusion Lens to observe and observe/pan group dynamics. Identify "just the facts" and the actual details of the situation without any assumptions, interpretations, judgments, or conclusions.

1. What differences are present in the group? Which group memberships? And how many from various groups?
2. Who is talking?
3. Who is quiet? Who doesn't speak as often as others?
4. How are people reacting nonverbally?
5. Who initiates the topics?
6. What ideas are brought up? By whom?
7. Whose ideas get considered? Whose ideas don't get much discussion?
8. Whose ideas are discounted, or "plop" without comment?
9. How do decisions get made?
10. Who interrupts others? Who gets interrupted? Who is never interrupted?
11. How and when does the tone and energy of the conversation shift and change?
12. How much airtime do people take?
13. Who has changed their way of engaging recently?
14. Who do people look at when they are talking?
15. Who has eye contact with whom while others are talking?
16. Who engages in side conversations?
17. Who brings up issues of respect and inclusion?
18. How do people respond when different issues of inclusion are raised?
19. What issues of inclusion and respect are not being brought up or discussed?
20. As you notice interpersonal dynamics that are not inclusive, who intervenes to shift the dynamics? Who doesn't?
21. As you observe exclusionary comments and actions, wonder: Is this an isolated incident or a possible common pattern of experience?

Adapted from materials developed by Elsie Y. Cross Associates, Inc. 1994 Delyte Frost, et al. "Tracking™"

Analyze and revise all policies, practices, products, programs, and services with an Equity & Inclusion Lens

1. **Start by gathering a group of people to create a long list** of current policies, programs, services, and practices…

   - That <u>MIGHT</u> be improved by analyzing & revising with an Equity & Inclusion Lens to meet the needs of the full breadth of those you serve.

   - Continue to share the list with an expanding group of people to collect additional ideas.

2. **Choose one policy, protocol, practice, or service to analyze.**

3. **Get clarity on the PROCESS for policy revision, WHO can make this decision and WHAT information may help them decide.**

4. **Gather a demographically diverse group with some stake in the process and who has knowledge about it.**

5. **Use this question to get an initial analysis from group members:**

   - How Equitable & Inclusive is this Policy, Program, Protocol, Practice or Service?

     Scale 0-10:
     0 = not at all   -------------   10 = completely

   - <u>Then ask them to reflect and share</u>:
     - What group identity lenses were you using as you answered?
     - How might staff and clients from various other identity groups possibly answer this question?

6. **Use the Group Identity Cards to identify:**
   a. What were possible productive intentions when this practice, policy, etc., was created?
   b. By group membership, who probably had their needs met <u>back then</u>?
   c. <u>Today</u>, by group membership, who probably gets their needs met?
   d. What groups may not have their needs met?
   e. What groups may face extra barriers, hurdles, and obstacles?
   f. What groups might be <u>unintentionally, negatively impacted</u> by this policy, practice, or service? This decision?

7. **Consider each of the Group Identity Cards as the group explores:**

   o How Equitable & Inclusive is this Policy, Program, Protocol, Practice or Service?

   Scale 0-10:
   0 = not at all   --------------   10 = completely

   o Make different columns of group identities to reflect the group's current perspectives, by group membership:

   • Definitely get their needs met

   • Some needs are probably met

   • May face many barriers and obstacles

   • May experience negative impact

8. **Notice which groups most individuals do not know enough about to place in a column.**

9. **Gather more data and new perspectives** from those who have knowledge, experience, and competence in these areas of diversity.

10. **Research practices and policies** at peer and aspiring organizations.

11. **Ask the Analyzing Group to identify a wide range of possible revisions.**

12. **Take this data and more broadly to gather additional insights of possible gaps and negative impact as well as recommended revisions:**

    a. Meet with other constituency groups

    b. Invite people who see possibilities, are innovative and systemic thinkers

13. **Develop a proposal of recommendations for the person(s) who has the power to make revisions.**

Group Identities: Differences That Make a Difference: a Partial List

1. Age

2. Care Giver Status

3. Criminal Background

4. Customer-facing/Back office

5. Disability Identity

6. Educational Background

7. Ethnicity/Culture

8. Family Make-up (of origin, current members)

9. Food Availability/Security

10. Gender Identity (cisgender, transgender)

11. Gender Presentation

12. Geographic Region

13. Health Status

14. Housing Status

15. Immigration Status

16. Language Proficiency/Use of English/ "Accents"

17. Mental Health Status

18. Nationality/Citizenship

19. Political Affiliation

20. Position & Level in the Organizational Hierarchy; Faculty/Staff/Administrators

21. Race/Racialized Identity, Settler/Indigenous Identity

22. Refugee Status

23. Relationship with Addiction

24. Relationship/Marital Status

25. Religion/Spirituality/Ways of Knowing

26. Revenue producing/not revenue producing

27. Sex assigned at birth (male, female, intersex)

28. Sexual Orientation/Sexuality

29. Size/Appearance/Athleticism

30. Skin Color

31. Socio-Economic Class (of origin; current)

32. Survivor Status

33. Transportation Status

34. Veteran/Military Status

35. Work Style (extroverts or introverts; results or process oriented)

36. Years of Experience (in the field, organization)

PRIVILEGED GROUP		MARGINALIZED GROUP
Late 30's to late 50's/early 60's	**1. Age**	Younger; Older
White	**2. Race**	Person of Color; People who identify as Biracial/Multiracial; Indigenous Peoples
Male	**3. Sex Assigned at Birth**	Female; Intersex
Cisgender	**4. Gender Identity**	Transgender; Gender Nonconforming; Gender Queer
President, Vice Presidents, Directors, Managers, Supervisors	**5. Hierarchical Level**	Direct service staff
Heterosexual	**6. Sexual Orientation**	Gay; Lesbian; Bisexual; Queer; Questioning
Upper class; Upper middle class; Middle class	**7. Social Class**	Working class; Living in poverty
Graduate or 4-year degree; highly valued school; private school	**8. Educational Level; Credential; Certificate**	High school degree; 1st generation to college; less valued school; public school
Christian (Protestant; Catholic)	**9. Religion/Spirituality**	Muslim, Jewish, Agnostic, Hindu, Atheist, Buddhist, Spiritual, LDS, Jehovah Witness, Pagan …
U.S. born	**10. National Origin**	"Foreign born;" Born in a country other than the U.S.
Not disabled	**11. Disability Status**	People with a physical, mental, emotional and/or learning disability; People living with AIDS/HIV+
"American;" Western European heritage	**12. Ethnicity/Culture**	Puerto Rican; Navajo; Mexican; Nigerian; Chinese; Iranian; Russian; Jewish…
Fit society's image of attractive, beautiful, handsome, athletic…	**13. Size, Appearance, Athleticism**	Perceived by others as too fat, tall, short, unattractive, not athletic…
Proficient in the use of "Standard" English	**14. English Proficiency**	Use of "non-standard" English dialects; have an "accent"
Legally married in a heterosexual relationship	**15. Relational Status**	Single; divorced; widowed; same sex partnership; unmarried heterosexual partnership…
Parent of children born within a 2-parent heterosexual marriage	**16. Parental Status**	Unmarried parent; do not have children; non-residential parent; LGBTQ parents…
More years in organization, field	**17. Years of experience**	New; little experience in organization, field
U.S. citizen	**18. Immigration Status**	People who do not have U.S. citizenship, are undocumented
Suburban; valued region of U.S.	**19. Geographic region**	Rural; some urban areas…less valued region
Light skin; European/Caucasian features	**20. Skin color; phenotype**	Darker skin; African, Asian, Aboriginal features…
Nuclear family with 2 parents in a heterosexual relationship	**21. Family Status**	Blended family; single-parent household; grandparents raising grandchildren; family with foster youth or adopted children…
Extrovert; task-oriented; analytical; linear thinker	**22. Work Style**	Introvert; process-oriented; creative; circular thinker

Group Identity Cards: Ways to Use Them with Team Members

How to create "sets" of Group Identity Cards:

1. Revise the suggested categories of difference to best reflect your organizational context (for access to current template: www.drkathyobear.com/resources).
2. Print off the pages with cards, single-sided.
3. On to bright-colored stock paper (I prefer yellow, orange, pink, blue).
4. Cut each 6+-pages, with all the different cards, into a "set" of 36+ different cards (keep any blank ones in each set).
5. Fasten with a rubber band or clip.
6. I recommend that each participant has their own set of Group Identity Cards to use in trainings, planning meetings, etc.

Ways to Use Group Identity Cards

1. **Socialization experiences**
   a. Invite each person to: Choose 4-6+ group identities that seemed to have **had the most influence in shaping your experiences as you were growing up**.
   b. Have them share stories, reflections, and insights in groups of 3-4.

2. **Panning**
   a. Ask folks to choose the cards that reflect the group identities they tend to notice and pay attention to when they are scanning/panning group dynamics in meetings.

3. **What is on your "screen?"**
   a. Ask participants to make 3 piles or groupings of cards:
      i. Areas of diversity that you most often think about, are "on your screen".
      ii. Those that you sometimes consider and think about.
      iii. Those you most often do not consider or think about.
   b. Share in groups of 2-3
   c. Large group debrief

4. **Your privileged and marginalized group memberships**
   a. Ask participants to make several groupings ~ Categories of diversity where they are in:
      i. A privileged group
      ii. A marginalized group
      iii. A group where they receive both marginalization and some forms of privilege
   b. Share in 2-3's: share examples and stories, insights

5. <u>**Which playing card are you, generally?**</u>
   a. Ask folks (after completing the playing card activity) to think about which "card" they get treated as:
      i. In most situations
      ii. In varying contexts
   b. Note: They can use the group identity cards to talk about the intersections of varies cards that contribute to the various forms of treatment they receive in different settings.

6. <u>**Next steps in your professional development:**</u>
   a. Ask folks to make several piles/groupings to reflect what areas of diversity that they:
      i. Know a lot about; could coach others
      ii. Know some, but want to know more
      iii. Don't know much; need to learn quickly
   b. Share in groups of 2-3
   c. Large group debrief

7. <u>**Which types of microaggressions do you interrupt effectively in a consistent manner?**</u>
   a. Ask folks to make several piles/groupings to reflect what areas of diversity that they:
      i. Easily recognize the types of microaggressions that occur AND respond effectively
      ii. Generally, can recognize them in the moment, but struggle to respond effectively
      iii. Not very aware or respond very effectively
   b. Share in groups of 2-3
   c. Large group debrief

8. <u>**Stereotypes**</u>
   a. Ask folks to make several piles/groupings to reflect what areas of diversity that they:
      i. Recognize they still have stereotypes about privileged and/or marginalized groups
      ii. Intentionally have worked hard to interrupt and unlearn the socialized stereotypes about privileged and/or marginalized groups
   b. Share in groups of 2-3
   c. Large group debrief

9. **Beginning to analyze current policies, practices, services, and programs with an Inclusion Lens**
    a. Identify a practice, policy, program, or service to analyze
    b. Ask folks to use the group identity cards to identify all of the marginalized groups that MAY be negatively (unintentionally) impacted by the current state; And/or have extra hurdles and obstacles given the current state
    c. Could also make several groupings:
        i. Most likely negatively impacted
        ii. Not sure if this group would be
        iii. Probably would have needs met, advantaged, or at least not disadvantaged by the current state

10. **Scanning how we present to others**
    a. Ask people to "scan" you and your environment for a week or so
    b. Then use the cards to describe which topics of diversity you seem to talk about, champion, or care about based on what they observed about you:
        i. In meetings
        ii. In your office area
        iii. On Facebook, Pinterest, Instagram
        iv. As you interacted on campus

11. **Conducting an Environmental Scan**
    a. Divide up the 22 cards among team members
    b. People can work individually or in pairs
    c. Ask folks to use each card as a "lens" through which to observe, scan, and experience the unit to begin assessing how the environment sends messages about how welcomed, respected, and attended to members of various marginalized groups may feel
    d. Ask folks to pay attention to everything, including:
        i. Who is present in the office; how do they interact across group memberships?
        ii. Office decorations, paintings, posters, bulletin boards
        iii. Pamphlets, books, and other materials on display
        iv. Web site statements, pictures/graphics, descriptions of programs and services, marketing
        v. Office set-up
        vi. How accessible is the office space/web site for people with disabilities (mobility, visual, hearing, learning) and language differences?
        vii. Have people share their evidence and observations in staff meetings or at a retreat

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