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Office of Finance and Operations (OFO)
Employee Quick Updates
January 25, 2021

"There is no certainty; there is only adventure." – Roberto Assagioli

Awareness

- **Departmental Administration Transition Website:** Thanks to the collective effort of the connectED team and the OFO webmaster, the transition site is now live. You can access and review the site on connectED.

- On January 20, the President signed a **new Executive Order (EO) on Protecting the Federal Workforce and Requiring Mask-Wearing**. The EO provides ongoing guidance to heads of agencies on the operation of the Federal Government, the safety of its employees, and the continuity of Government functions during the COVID-19 pandemic.

- **Revocation of Executive Order 13950 on Combating Race and Sex Stereotyping. Resumption of Diversity and Inclusion related training at the Department.** On January 20, 2021, President Biden issued Executive Order Advancing Racial Equity and Support for Underserved Communities Through the Federal Government (Sec. 10). This Executive Order, among other things, revoked EO 13950. Diversity and Inclusion (D&I) related training at the Department will resume. For information concerning D&I related training, please contact Michael Chew at 202-401-0691 or Michael.Chew@ed.gov. For information on EO 13950 regarding federal contracting and grants administration, please contact Phillip Juengst, Deputy Assistant Secretary, Office of Acquisition and Grants Administration (OAGA), at 202-453-6396 or Phillip.Juengst@ed.gov

COVID-19 Latest Update

- The Department remains in **Phase 1** of our Workplace Reconstitution Transition Plan (WRTP). **Flexible Work and Telework** Schedules remain in effect. We will continue updating the WRTP and the companion COVID-19 FAQs (frequently asked questions) as we receive additional Centers for Disease Control guidance.

- **REMINDER: The Families First Coronavirus Response Act (FFCRA):** The FFCRA mandated paid leave provisions that went into effect on April 1, 2020, for

Federal employees expired on December 31, 2020. More information about the expired FFCRA provisions can be found here https://connected.ed.gov/Pages/Emergency-Paid-Sick-Leave-Guidance.aspx. If you have specific questions about the impact on your situation, please contact the Office of Human Resource's Workforce Relations Division at benefitsandwork/life@ed.gov.

Office of Equal Opportunity Services (Michael Chew)

- **Celebratory Event – Dr. Martin Luther King, Jr. Day**
  Virtual Panel Discussion will be held on Tuesday, **January 26, 2021, from 12:00 – 1:00 p.m.** The 2021 Dr. Martin Luther King, Jr. Day theme is "Keep Moving Forward." The panel will feature Missouri's 2021 Teacher of the year Mr. Darrion Cockrell and Georgia's 2019-2020 Pre-K Teacher of the Year, Mr. Johnathan Hines. Both were featured on NBC News, acknowledging their roles for breaking down barriers and igniting the fire of students in their individual states. To participate in this event online via Microsoft Teams on your computer or mobile app, click here Dr. Martin Luther King Jr. Day Event or call-in phone number (audio only) 1-202-991-0393, phone conference ID: 131 806-52#. For more information, see connectED at Dr. Martin Luther King Jr. Day or contact Jazmine Quintyne at Jazmine.Quintyne@ed.gov or 202-320-3393.

Budget Service (Larry Kean)
FY 2021 Budget Update:

- On December 27, 2020, the President signed the Consolidated Appropriations Act, 2021, into law.
- Budget Service submitted all apportionments for FY 2021 resources to the Office of Management and Budget (OMB), and has received approval back from OMB for most of them. Budget Service continues to issue funding allotments to Department principal offices accordingly.
- Budget Service is finalizing FY 2021 Salaries and Expenses (S&E) allocations for Department principal offices. The allocations will include resources for both pay (staff) and non-pay costs (contracts, travel, training, etc.). Budget Service will communicate office funding allocations via the Budget Formulation Database during the week of **January 25 – January 29.** Please direct any allocation questions you may have to Louis Mauney, Letha Trimmer, or Larry Kean.
- Budget Service distributed a detailed summary of the provisions pertinent to ED contained within the Consolidated Appropriations Act, 2021. The bill provides discretionary appropriations of $73.5 billion to fund the Department through September 30, 2021, supplemental appropriations of
  $82 billion for the Department to help respond to the coronavirus emergency, and additional legislation affecting student aid and other programs.

Acquisition and Grants Management (Phillip Juengst)

➢ **Contract actions**: Thank you to Contracting Officer's Representatives (CORs) for engaging the Contracts and Acquisition Management Division early in the planning process and for submitting packages on-time. The status of packages for each program office can be found on the CAM Dashboard for CORs.
➢ **Grants updates:**
   ○ **Crosswalk Available for Regulatory Revisions (2 CFR 200).** Office of Management and Budget, in partnership with representatives from the Federal awarding community, developed a crosswalk document to support Federal

awarding agencies and recipients in their implementation of the revisions to 2 CFR published on August 13, 2020, in 85 FR 49506. The crosswalk is available at the following link: 2 CFR Revisions (85 FR 49506) Crosswalk.

- The Risk Management Services Division has posted an **updated Lead State Contacts List** for Risk Management Specialists available to assist program staff. The list can be found on ConnectED at: RMSD-Lead State Contacts List or on SharePoint at: Risk Assessment.

- **Reminder: ED-Wide Risk Management State Briefings**
  - The Risk Management Services Division is hosting its next ED-Wide Risk Management Meeting on Thursday, **January 28**, via TEAMS, from 2:00 p.m. - 3:15 p.m. All ED staff are welcome to attend state briefings covering **Georgia, Oregon, and Virginia.**

> **Upcoming training events:**
- **Conversations with Contracting Officer's Representatives (CORs) Training Series - Post Award Basics** course offered **January 28** from 1:00 - 2:00 p.m. Please register via FedTalent.

- **Grants training reminders:**
  - Conducting A Risk Assessment/Evaluation: An Overview FY 2021 – **February 4**
  - Cost Analysis & Budget Review: New Award Focus – **February 9**
  - FY 2021 License Holder Annual Mandatory Training – **February 23**

Business Support Services (Andrew Sanzenbacher)

- **Hyperion System Implementation Status Update**: Upon adjudication and rejection of the vendor award protest, the Business Support Services team kicked off Phase 1 of the project with the contractor (CREOAL) on Friday, January 22.
  - The solution implementation will begin with a "lift and shift" of the current Performance Management (actual vs. planned) and Travel spend plan functionality to the Oracle Enterprise Performance Management Cloud environment. The migration will take six weeks with a planned completion date of **March 19,** followed by a transition to operations and maintenance by **March 31.**
  - The Salary and Expense Payroll Modeling project will begin in mid-March, with a planned implementation in January 2022.
- **Federal Government Organization/Vendor Identifier Change: DUNS to UEI:** GSA announced a new date for the transition from DUNS to new Unique Entity Identifier (UEI). By **April 2022**, the federal government will stop using the DUNS number to uniquely identify organization/vendor entities registered in the System for Award Management (SAM). At that point, entities doing business with the federal government will use a unique entity identifier created in SAM.gov. OBSS has already been preparing for this change and is renewing the development work to meet the new deadline.

Small and Disadvantaged Business Utilization (OSDBU) (Calvin Mitchell)

- **Departmentwide Small Business Goals for Fiscal Year 2021:** The FY2021 Departmentwide prime small business goal is 14%, and subcontracting goal is 39%. Monthly progress toward the

departmentwide small business goals and contracting totals can be viewed on the Small Business Dashboard.

- **First Quarter Small Business Goal Progress:** Small Business: 11.89%, Small Disadvantaged Business: 7.37%, Woman Owned Small Business: 7.65%, Service-Disabled Veteran Owned Small Business: 0.22%, Historically Underutilized Business Zone: 0.31%.

OFO Small Business Status Update

- **First Quarter Small Business Goal Progress:** Small Business: 11.89%, Small Disadvantaged Business: 7.37%, Woman Owned Small Business: 7.65%, Service-Disabled Veteran Owned Small Business: 0.22%, Historically Underutilized Business Zone: 0.31%.
- **Small Business Set-asides:** In general, if there are at least two small businesses that could meet contract needs at a fair price, the contract should be set aside exclusively for small businesses. If there are fewer than two, you may be authorized to create a sole-source contract or otherwise offer it for full and open competition. All acquisition packages over $250,000 are to be reviewed by OSDBU prior to the posting of solicitations. Small business specialists are available to assist you in conducting market research in addition to OSDBU's Small Business Customer Experience site.

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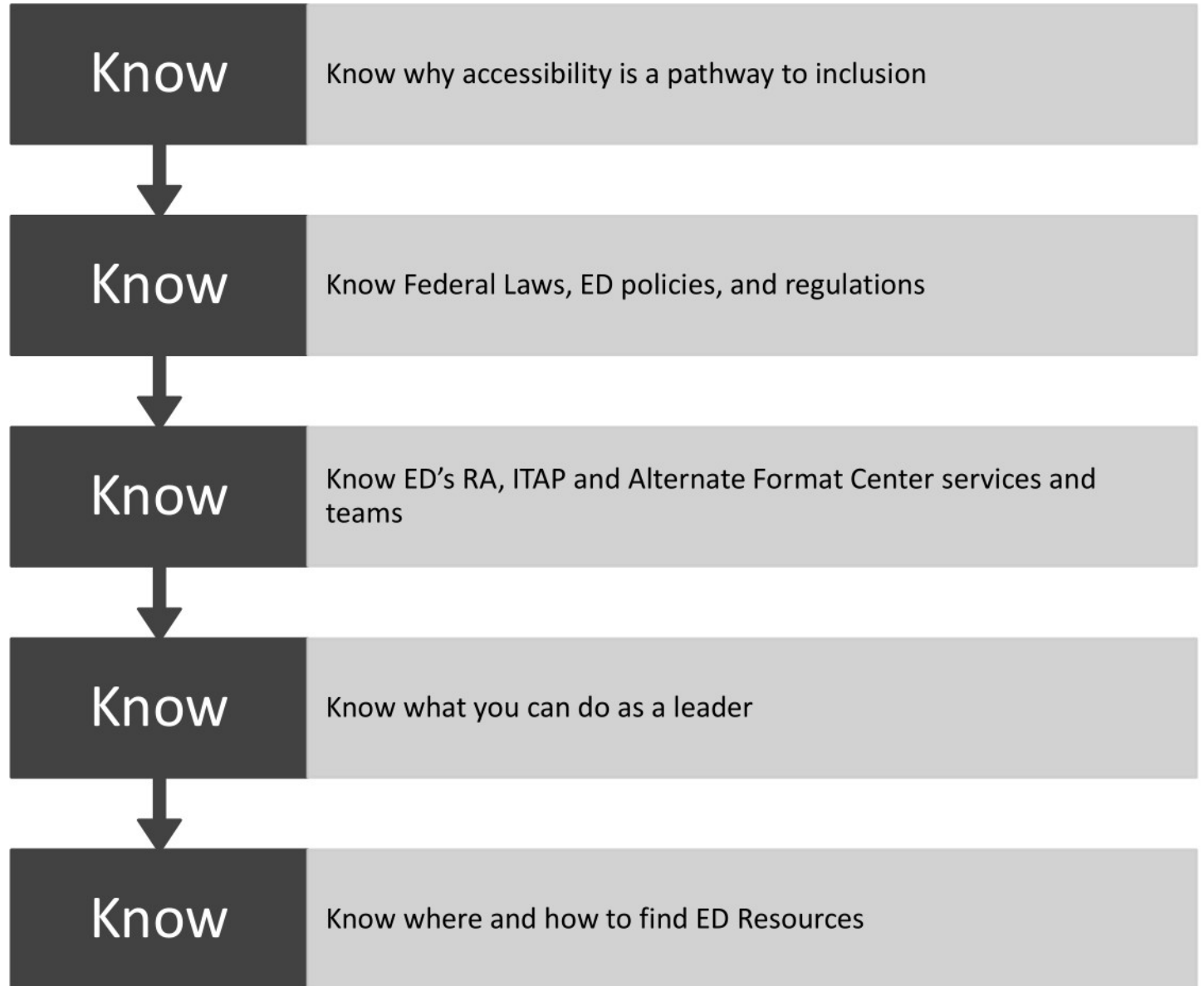## Human Resources (Antonia Harris)
HR Reminders:

- **February 1 – 12** – Office of Personnel Management will begin releasing agency Federal Employee Viewpoint Survey (FEVS) results
- **February 19** – Deadline for Q1 Special Act awards above $2,500 and Cross-POC awards.
- **February 24** – Federal Employees Retirement *System* (*FERS*) Retirement and Benefits Seminar:
    - **Part 1,** 11:00 a.m. -12:00 p.m. – FERS System. Register here
    - **Part 2,** 2:00-3:30 – Thrift Savings Plan. Register here
- **February 25** - FERS Retirement and Benefits Seminar:
    - **Part 3:** 1:00 a.m. -12:00 p.m. – Federal Employees' Group Life Insurance (*FEGLI*). Register here
    - **Part 4:** 2:00 - 3:30 p.m. – Social Security and Planning. Register here
- **March 17** – Civil Service Retirement System (*CSRS*) Retirement and Benefits Seminar. Register here

Why Accessibility Matters for a Culture of Inclusion

AUDIO AND VISUAL ARE PROVIDED THROUGH THE MS TEAMS
WEBINAR PLATFORM. SIGN LANGUAGE IS PROVIDED VIA VIDEO.
THIS PRESENTATION IS ACCESSIBLE (508C)

Presentation Overview

Know	Know why accessibility is a pathway to inclusion
Know	Know Federal Laws, ED policies, and regulations
Know	Know ED's RA, ITAP and Alternate Format Center services and teams
Know	Know what you can do as a leader
Know	Know where and how to find ED Resources

Which of these reasonate with you for an inclusive workplace?

- My ideas
- My viewpoints
- My background
- My personality
- My unique contributions
- My creativity
- My experiences
- My attributes

- Feeling Valued
- Respect for my abilities and experience
- I have access to equal opportunities
- Being accepted and appreciated
- A feeling of belongingness
- Feeling I can bring my whole self to work

3

Section 508 Compliance

All information presented within Federal Government websites must be accessible to persons with disabilities

- Section 508 technical standards must be followed to ensure compliance
- connectED Articles are easier to make compliant than Documents
- It is the responsibility of Contributors and Webmasters to ensure that all submitted/approved content is compliant
- Non-compliant content may be posted only if an accessible alternative is provided
- CMT may reject or remove any non-compliant content

Accessibility Policies and Guidance
- Please visit the Information Technology Accessibility Program (ITAP) site: https://connected.ed.gov/itap
- Includes guidelines, testing tools, and training resources

Accessibility Reviews and Document Remediation
- Use the email request form link available on the Using connectED page, which sends the request to AEIHelp@ed.gov

Pathways to fulfilling the ED Mission…

To promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.

DEIA Mission…

To strengthen and invest in our workforce through a sustained department-wide effort to integrate diversity, equity, inclusion, and accessibility into every aspect of our culture and how we do business.

Inclusion Is

- The recognition, appreciation and use of the talents and skills of employees of all backgrounds.

- A culture that connects each employee to the organization by creating an environment of mutual respect, trust, commitment and fostering a <u>sense of belonging.</u>

What is Accessibility?

Accessibility: is the design, construction, development, and maintenance of facilities, <u>information and communication technology</u>, <u>programs</u>, and <u>services</u> so that all people, including people with disabilities, can fully and independently use them.

DEIA: Addition of the "*A*" for *accessibility* recognizes that the concept of diversity, equity and inclusion must be broadened to address barriers to equitable *access*, both **<u>physical and virtual.</u>**

Key Definitions

What is a disability?

According to the ADA, an individual is disabled if:

- Has a physical or mental impairment that substantially limits one or more major life activities
- Has a record of such an impairment
- Is regarded as having a disability

ADAAA expands the definition to include:

- Bodily functions as a major life activity
- Health conditions that are episodic or in remission

Perception Differences

The perception of people with disabilities is vital for full inclusion.

Some differences are apparent across disability categories and can include:

- Veterans who sustained disabling conditions in combat and view themselves as wounded warriors

- Individuals with ADA covered impairments who are often unaware that their medical conditions may rise to the level of ADA defined disability

- Those with non-visible disabilities that are reluctant to disclose their impairments for privacy reasons, concerns about not getting hired, or due to possible stigma

Source: The National Institutes of Health

What We Know (The Why)

- In the U.S. population, an estimated one in four Americans has a disability (seen or unseen) DOL

- According to DOL, the current labor force participation rate for people with disabilities is 22.6% compared to those without disabilities at 67.6%

- People with disabilities represent all ages, races, ethnic backgrounds, educational, socio-economic levels and identity factors

- The employment rate of individuals with *targeted disabilities* has the lowest participation rates

Know our Federal laws, and ED policies and regulations that can influence a culture of inclusion

Know: The Laws and Policies

Americans with Disabilities Act

Prohibits discrimination and protects the rights of people with disabilities in public accommodations, jobs, transportation, government services, and telecommunications.

Rehabilitation Act of 1973

The Rehabilitation Act of 1973 protects people with disabilities in America. The most well known is Section 504 (no federal agency can discriminate against a disabled person).

Know: The Laws and Policies *(continued)*

USERRA

The Uniformed Services Employment and Reemployment Rights Act of 1994, provides protections for disabled veterans, requiring employers to make reasonable efforts to accommodate their disability.

Disability Policy in the Federal Government

As the Nation's largest employer, the Federal Government has a singular responsibility to lead in supporting diversity, equity, inclusion and accessibility for individuals with disabilities in the workforce.

Federal Laws and Regulations

Section 504 of the Rehabilitation Act of 1973

Section 501 of the Rehabilitation Act of 1973, as amended, and Implementing Rule
- EEOC Management Directive 715 (MD-715)

Section 508 of the Rehabilitation Act of 1973, as amended

Architectural Barriers Act of 1968

Section 504 of the Rehabilitation Act of 1973

Section 504 of the Rehabilitation Act of 1973

- Prohibits discrimination of qualified individuals with disabilities

- Requires qualified individuals with disabilities be provided accommodations

- Supervisors, employees engage in an interactive process to determine effective accommodation

Section 501 of the Rehabilitation Act of 1973

- Places several distinct obligations on federal agencies:

Section 501 of the Rehabilitation Act of 1973, as amended, and Implementing Rule

- EEOC Management Directive 715 (MD-715)

- Prohibits discrimination against qualified individuals with disabilities, using same standards as Title I of the ADA

- Oversight: Requires each agency to submit to the EEOC an annual plan for the **hiring, placement, and advancement** of individuals with disabilities

- Reasonable accommodation: Comprehensive written procedures with right of appeal

- Accessibility: Informing applicants and employees of rights under Section 508 and Architectural Barriers Act

- Personal Assistance Services (PAS): Provision of PAS to employees who need them because of a targeted disability

A Reasonable Accommodation is

- Any modification to the job, the work environment, or the way things are usually done that allows a qualified individual with a disability to apply for a job, perform job functions, or enjoy **equal access** to benefits and privileges of employment.

- Any adjustments a manager makes to the way an employee accesses or performs work functions based on knowledge of medical limitations is a reasonable accommodation.

- A person with a disability is someone who has a medical condition that substantially limits a major life activity.

Resource: ED Handbook for Reasonable Accommodations

Section 508 of the Rehabilitation Act of 1973 Accessibility

Section 508 of the Rehabilitation Act of 1973, as amended

- Requires all electronic and information technology (also referred to as information and communication technology, or ICT) that is developed, procured, maintained or used by a federal agency to be accessible to people with disabilities.

- Includes developing, procuring, maintaining, or using electronic and information technology.

- Ensure comparable access.

Architectural Barriers Act of 1968

Architectural Barriers Act of 1968

- Requires access for people with disabilities to facilities that are designed, built, altered or leased with federal funds.

Executive Orders

| 1998	2000	2010	2011	January 20, 2021	June 25, 2021
Executive Order 13708, Increasing Employment of Adults with Disabilities [March 13, 1998]	**Executive Order 13163,** Increasing the Opportunity of Individuals With Disabilities to be Employed in the Federal Government [July 26, 2000]	**Executive Order 13548,** Increasing Federal Employment of Individuals with Disabilities [July 26, 2010]	**Executive Order 13583,** Establishing Coordinated Government-Wide Initiative to Promote Diversity and Inclusion in the Federal Workforce [August 18, 2011]	**Executive Order 13985** Advancing Racial Equity for Underserved Communities Through the Federal Government	**Executive Order 14035** Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce

Executive Order 14035

Advancing Equity for Individuals with Disabilities

- The Federal Government must become a model for the employment of people with disabilities.

- A workforce that includes people with disabilities is a stronger and more effective workforce.

- Provide an equitable, accessible, and inclusive environment for employees with disabilities.

- Accessible information and technologies must be provided.

- Reasonable accommodations must be available that will allow qualified individuals with disabilities to perform the essential functions of their positions and have access.

GOVERNMENT-WIDE STRATEGIC PLAN TO ADVANCE DIVERSITY, EQUITY, INCLUSION, AND ACCESSIBILITY IN THE FEDERAL WORKFORCE

NOVEMBER 2021
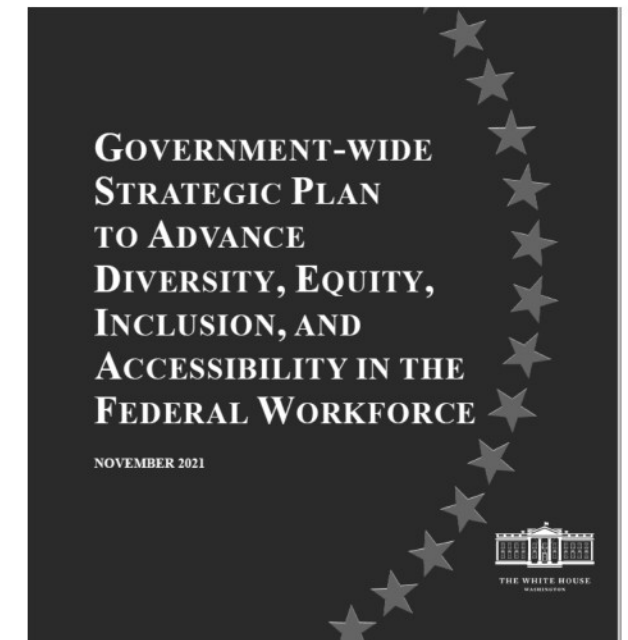
Know ED's Alternate Format Center, Reasonable Accommodation, and Information Technology and Assistance Program (ITAP) Services, Leaders, and Teams

# Introduction to Tena Witherspoon, Director
Alternate Format Center
Tena.Witherspoon@ed.gov

- Tena started in ED in 2005 and received training on preparing large print and electronic documents in accessible form and progressed to learn to read and write Braille Materials

- Supported Frank (former Director of the AFC) and lead change in 2018

- Learned how to convert Word documents into Braille documents for use by blind staff and customers

- Received technology training from the Assistive Technology Group in the OCIO

- Training allowed me to assume te leadership position and work with Tracey

What the Alternate Format Center Provides

- Accessible Braille, large print, and accessible electronic documents to accommodate internal and external customers

- Delivery time for services depends on length and complexity of documents needing accessibility

- Send documents in Word or text format as soon as they become available to you

- Send documents at least 10 business days in advance for long or complex documents
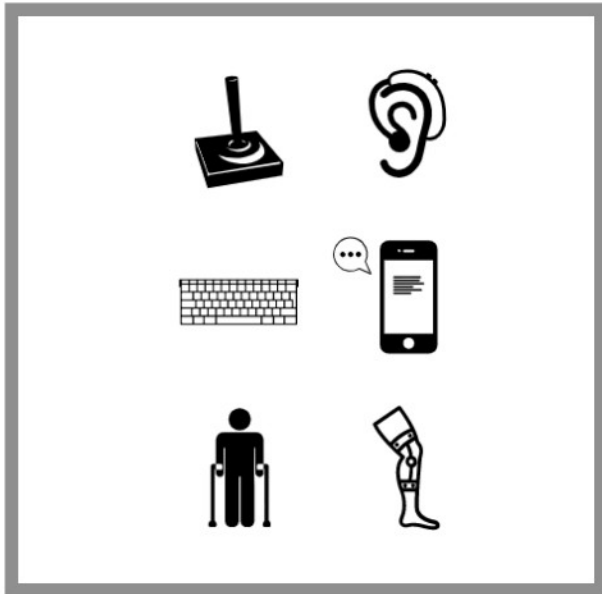
What is Assistive Technology?

Some employees with disabilities may use assistive technology (AT) to access technology or perform tasks. AT is any item, piece of equipment, software program, or product that is used to increase, maintain, or improve the functional capabilities of people with disabilities. There is a wide variety of AT products and applications that enable ED employees to improve their ability to access technology.
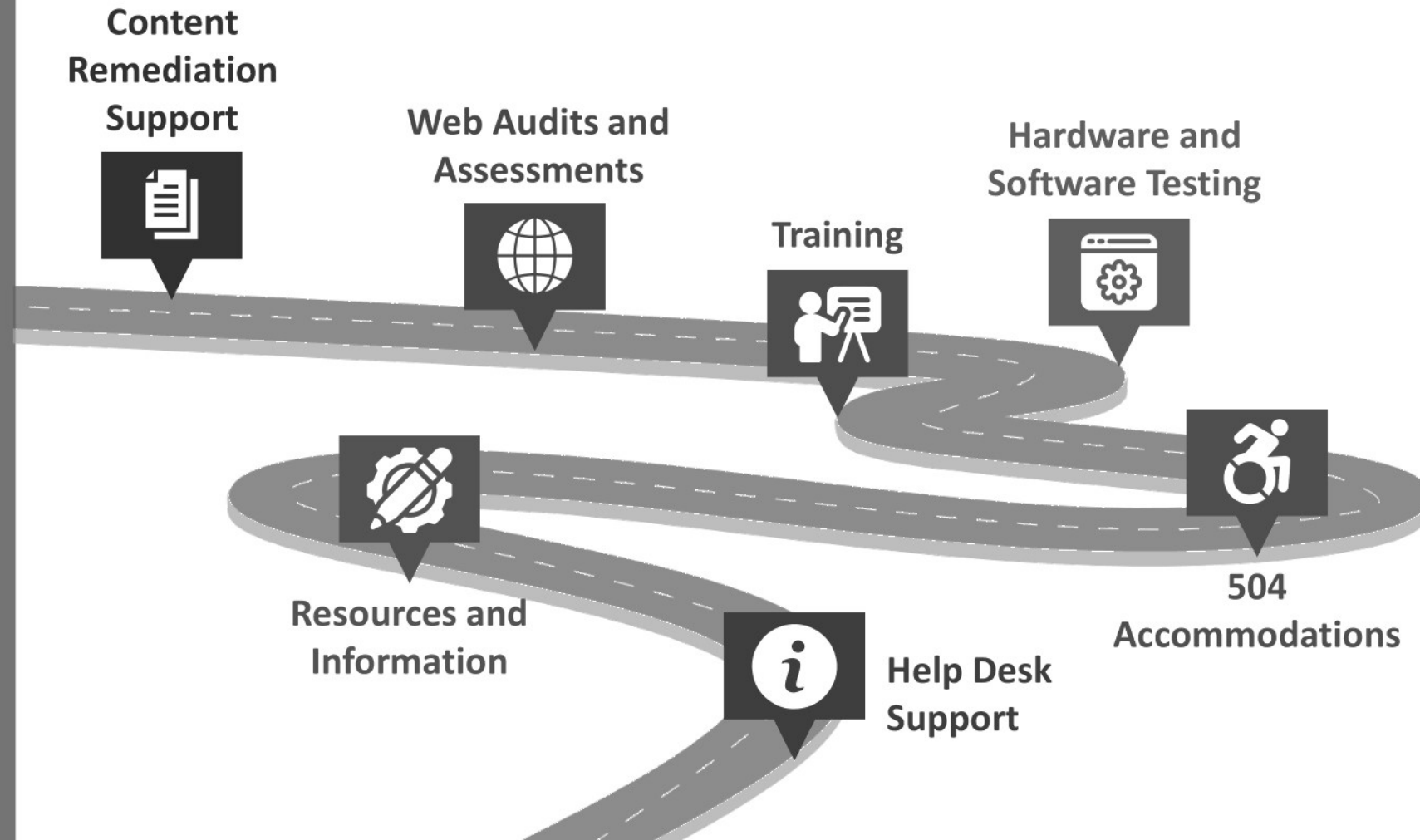
ITAP: Who We Are

Removing Roadblocks Between People and Information

INFORMATION
TECHNOLOGY
ACCESSIBILITY
PROGRAM
ITAP

- Who We Are

- Benefits of Accessibility

- How Can You Champion Accessibility

- Accessibility Resources

Content Remediation Support

Web Audits and Assessments

Training

Hardware and Software Testing

Resources and Information

Help Desk Support

504 Accommodations

Benefits of Building Accessibility into Your Workflow

The Shape of Your Source Content Directly Impacts the Time and Effort Required to Make it Compliant

Ensures everyone has access to your content

Avoids rework at the end of a project and resulting delays to posting

Increases efficiency in content creation and iteration

saves time and money

Accessibility is Everyone's Responsibility:

How Can You Champion Accessibility?

Appoint "accessibility ambassadors" within your POC

Collaborate with ITAP early and often

Change your workflow to incorporate accessibility from the beginning

Enforce your contractors to create and submit accessible content

Supply your staff with the right resources (i.e., Adobe Acrobat)

Stop assuming 508 is a quick "check the box" – remediation takes time and planning

How ITAP Can Help You:
Accessibility Resources

1 **Visit ITAP's connectED site:**
https://connected.ed.gov/itap/SitePages/default.aspx

2 **Reach out to our Help Desk:**
ITAPSupport@ed.gov

3 **Check out self-paced resources**:
- 508.gov Training Videos
- HHS's Section 508 Guide: Tagging PDFs in Adobe Acrobat Pro

4 Lookout for **future ITAP-sponsored trainings**

Know what you <u>should</u> and <u>can</u> do as a leader

What Managers Can Do About Disability Employment Tip #1

Know ED's Selective Placement Program & Policy

The purpose of the Selective Placement Program (SPP) is to facilitate the recruitment and hiring of individuals with disabilities under the Schedule A hiring authority in accordance with OPM guidance.

It is the **policy** of the U.S. Department of Education (ED) to support the goals and objectives of the SPP by providing equal opportunity in the hiring, placement, and advancement of qualified individuals with disabilities, including disabled veterans. Follow the law.

ED has a **Selective Placement Coordinator** in the Office of Human Resources who provide advice to managers about candidates available for placement in jobs under special hiring authorities. Point of Contact is Wayne Wright at Wayne.Wright@ed.gov

What Managers Can Do: **Tip #2**

Be aware and understand what is <u>Schedule A Hiring Authority</u>

- A critical tool for increasing employment opportunities for people with disabilities in the Federal Government.

- Excepted appointing authority used by the Federal Government

  - A non-competitive process for people with disabilities for employment in the Federal Government

- Eligibility via a Schedule A Letter

  - Licensed medical professional or other entity (i.e., an applicant's doctor)

  - Licensed vocational rehabilitation specialist

What Everyone <u>Should</u> Know:
Tip #3 Best Practices for Interaction

1

Introduce yourself: When meeting a person with a disability, act in the same manner as you would a person without a disability.

2

Speak directly to the person: Some people with disabilities may use an interpreter, attendant or other support professional.

3

Avoid Intrusive Questions: Do not ask questions about a person's disability unless it is bought up by the person.

4

Question your assumptions: Avoid assumptions about the abilities of candidates or employees with disabilities.

5

Consider open-door policy: By giving employees a small nudge that your door is open by scheduling one-on-ones with them

Know where and how to find ED resources

Easy Access to Resources ED-Wide

Reasonable Accommodation:
reasonableaccommodation@ed.gov

Alternate Format Center:
Tena.Witherspoon@ed.gov
Tracey.Flythe@ed.gov

Needs Assessments:
Stephanie.Woerner@ed.gov

508 Program Manager
Denise.McGland@ed.gov

Web Accessibility:
Denise.McGland@ed.gov

Sign Language Interpreting and Captioning Services (CART):
interpretingservices@ed.gov

Document Accessibility:
Denise.McGland@ed.gov

Disability Resource Group:
DRG@ed.gov

Resources Federal Agencies
Communication Tips for Disability Inclusion (Center for Disease Control) CDC

Department of Education Disabilities Resource Group

Easy Access to Disability Inclusion

The **ED Disabilities Resource Group (DRG)** was established to better support inclusion of individuals with disabilities in the Department's workforce. The DRG is a valuable resource in ED.

The DRG team are ED colleagues who strive to:

- Help to create a culture that promotes inclusion, equity, and accessibility.
- Enable individuals with disabilities to participate fully and successfully in ED's workforce.
- Increase awareness of disability-related issues, concerns and related policies for employees and supervisors.

Contact: Vanessa Tesoriero (Office of Finance and Operations) Vanessa.Tesoriero@ed.gov.

External Resources on Disability Awareness and Tools

JOB ACCOMODATION NETWORK

Partnership on Employment & Accessible Technology

EMPLOER ASSISTANCE AND RESOURCE NETWORK ON DISABILITY INCLUSION

PEAT

The Future of Work   Employer Toolkits   Collaboration & Action   Q

Digital Accessibility Toolkits

Digital devices, platforms, and documents are increasingly becoming the primary methods used by individuals to execute work and engage in daily life. The following resources help equip employers with the information needed to ensure the digital workplace is accessible to everyone, including people with disabilities.

Questions?

- Know why accessibility matters for a culture of inclusion
- Know the Federal Laws, ED Policies, and Regulations
- Know ED's RA, ITAP and Alternate Format Center services and teams
- Know what you can do as a leader
- Know where and how to find ED Resources

Thank You!

Creating an Inclusive & Accessible Workplace for All

Welcome

Disability Resource Group

Accessible Design

LAB°OPM

Disclaimer

These presentations contain resources that are provided for the user's convenience. The inclusion of these materials is not intended to reflect its importance, nor is it intended to endorse any views expressed, or products or services offered. These materials may contain the views and recommendations of various subject matter experts as well as hypertext links, contact addresses and websites to information created and maintained by other public and private organizations.

The opinions expressed in any of these materials do not necessarily reflect the positions or policies of the U.S. Department of Education. The U.S. Department of Education does not control or guarantee the accuracy, relevance, timeliness, or completeness of any outside information included in these materials.

LAB°OPM

LAB°OPM

Accessible Design

U.S. Department of Education DEIA
Inclusion Forum

July 13, 2021

LAB°OPM

We foster innovation through human-centered design (HCD).

We work to:

- teach HCD across the federal government

- help deliver innovative solutions to address complex public-sector challenges

Accessible Design

Lab at OPM

How We're Making Change

We're driving towards impact in four reinforcing ways.

We're growing design skills.

Through classes, custom workshops, and project-based learning, we're growing design skills within the federal workforce—both practical abilities and critical understanding of human-centered design methods and mindsets.
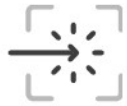
We're bringing design into new domains.

Through partnerships, we are expanding the contexts in which design is used to address public challenges. We are bringing design into public health, healthcare, science, human resources, and other fields where it isn't widely adopted and making unlikely pairings.
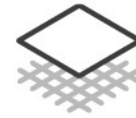
We're fostering conditions for design.

We're helping our long-term partners understand how to hire designers, what resources enable designers to do their work, and what conditions are needed to sustain a successful design practice in government.

We're leveraging community around design.

By connecting, developing, modeling, and supporting the growth of design communities, we're sustaining and socializing the practice of design beyond our direct reach.

What We Offer

We build HCD capacity in the following ways.

Classes

Open-enrollment classes build critical skillsets for public sector innovation. They provide foundational knowledge of approaches and mindsets to broaden interest in and comfort with practicing HCD in government. Participants benefit from the cross-agency perspectives and connections they form in these open, collaborative sessions.

Custom learning programs

Teams or programs can request customized classes and workshops, enabling them to interpret the value of HCD in their work and imagine integrating it into existing processes and plans. Customized classes often lead to additional engagements with the Lab.

Project-based partnerships

The Lab builds partnerships to tackle process, program, and delivery challenges with applied HCD. Projects last months to years and help develop capacity for HCD. Partners gain new perspectives, fresh approaches, and support to solve pressing challenges.

Program development

A recognized leader in expanding the domain of design in government, the Lab advises organizations developing programs across government. Through these partnerships, the Lab grows and integrates design in new ways and in new contexts and sustains civic design practice.
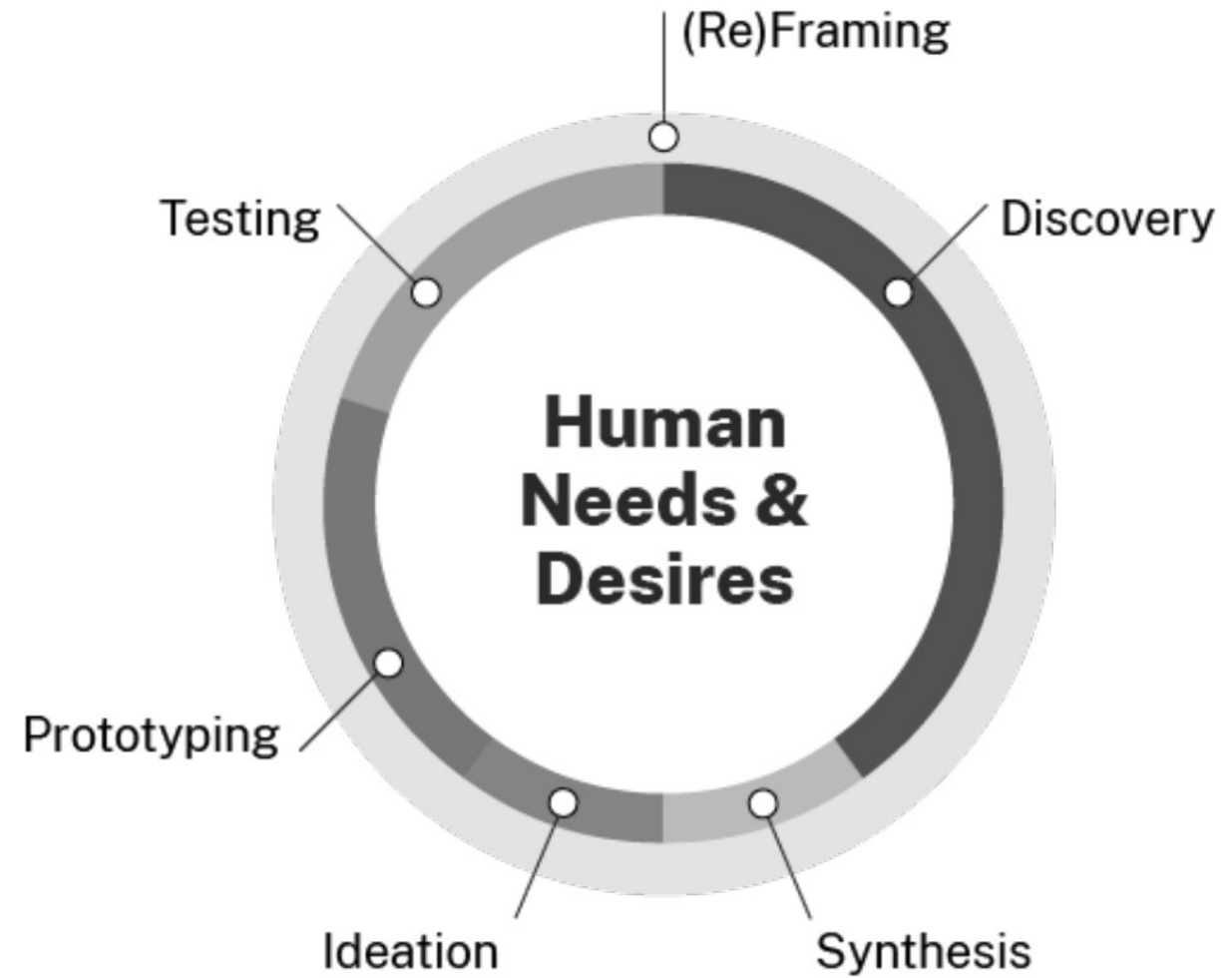
Human-Centered Design and Accessibility

What is HCD and how does it relate to accessibility?

What is Human-Centered Design (HCD)?

An approach to navigating complex problems and creatively designing effective solutions to meet people's real needs.

Accessible Design

HCD Process

"Everyone designs who devises courses of action aimed at changing existing situations into preferred ones."

- Herbert Simon

Human-centered design

Accessible Design

Human-centered design

What is Accessibility?

Design of products, devices, services, or environments so people with disabilities can use them unassisted or in a way that's compatible with their preferred assistive technologies.

Section 508 of the Rehabilitation Act of 1973

- Applies to developing, procuring, maintaining, or using electronic and information technology

- Must give people with disabilities comparable access

Accessible Design   Lab at OPM

Section 508 Functional Criteria

Must be accessible to people

- Without vision, with limited vision, without perception of color

- Without hearing, with limited hearing, without speech

- With limited manipulation, with limited reach and strength

- With limited language, cognitive, or learning abilities

# W3C Web Content Accessibility Guidelines (WCAG)

- Globally recognized, voluntary standard

- Testable statements that are not technology-specific

Americans with Disabilities Act

Prohibits discrimination and protects the rights of people with disabilities in public accommodations, jobs, transportation, government services, and telecommunications

What is Assistive Technology?

Anything that increases,
maintains, or improves
the functional capabilities
of persons with
disabilities
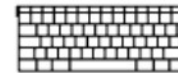
Accessible Design

Accessibility is more than compliance with standards.

Accessible Design

Inclusive design and universal design

Accessible Design

Photo:
National Park
Service

Photo: U.S. Air
Force

Photo: U.S. Air
Force

Challenges to Accessible Design

What gets in the way of accessibility?

- **Lack of awareness**

- **It's too expensive or not enough time**

- **It's someone else's responsibility or specialized job**

- **Users with disabilities are "just edge-cases"**

- **It's hard to know where to start**

Accessible Design

- **Lack of awareness**

- It's too expensive or not enough time

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Accessible Design

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Accessible Design

	Permanent	**Temporary**	**Situational**
Touch	One arm	Arm injury	New parent
See	Blind	Cataract	Distracted driver
Hear	Deaf	Ear infection	Bartender
Speak	Uses a communication device	Laryngitis	Heavy accent

Source:
Microsoft
Inclusive
Design

Permanent 26,000
per year

Temporary
13 million per year

Situational
8 million per year

21 million +

- **Lack of awareness**

- **It's too expensive**

- **It's someone else's responsibility or specialized job**

- **Users with disabilities are "just edge-cases"**

- **It's hard to know where to start**

LAB°OPM

Questions?

Additional Resources

- ## Section508.gov

  - ### Create Accessible Digital Products

  - ### IT Accessibility Laws and Policies

- ## Digital.gov Accessibility Resources

- ## Lab at OPM

  - ### Designing Accessible Communications

  - ### Fundamentals of Human-Centered Design

Resources at ED

Reasonable Accommodation:
reasonableaccommodation@ed.gov

Alternate Format Center:
Tena.Witherspoon@ed.gov
Tracey.Flythe@ed.gov

Needs Assessments:
Stephanie.Woerner@ed.gov

508 Program Manager
Denise.McGland@ed.gov

Web Accessibility:
Terri.Youngblood@ed.gov

Sign Language Interpreting and Captioning Services (CART):
interpretingservices@ed.gov

Document Accessibility:
Denise.McGland@ed.gov

Disability Resource Group:
DRG@ed.gov

The Art of Building an Inclusive Mutigenerational Organization

UNITED STATES DEPARTMENT OF EDUCATION

DIVERSITY FORUM

JULY 13, 2021

Jeffrey Vargas, President/CEO Generationology LLC

Thank
You...

Fulfilling the ED Mission...

To promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.

Dedicated to:

- Establishing policies on federal financial aid for education and distributing as well as monitoring those funds.

- Collecting data on America's schools and disseminating research.

- Focusing national attention on key educational issues.

- Prohibiting discrimination and ensuring equal access to education.

The Work You Do Matters...

Past Work Stuff....

- Federal Intrapreneur, Strategist
- Federal Human Capital Leader – 22 years.
- Chief Learning Officer, nuclear weapons complex (NNSA).
- Chief Learning Officer, financial oversight (CFTC).
- Federal recruiter, human capital strategist, employee engagement, diversity and inclusion (DOE)
- Mentor, youth advocate, leader.
- Fourteen Years – Federal Generations Expert.

Caveats – Today's Discussion

There will be generalizations made during the presentation.

Generalizations by definition, are not true of everyone but provide a useful framework for discussion.

Generalizations in this context allow us to understand what may be true about a generation and to work with, rather than reject the differences between generations.

Let's Begin...

Chat Box Answer…☺
Where are you right now?

*Home Virtual Presentation Studio – **Arvada, Colorado***

Agenda

Explore - Generational Biology

Outline - How to Build and Sustain an Inclusive Multigenerational Organization

Identify - Inclusive Intergenerational Traits, Behaviors, and Habits.

Showcase - Tools and Tips

Generational Biology – Learn, Grow, Collaborate, Lead.
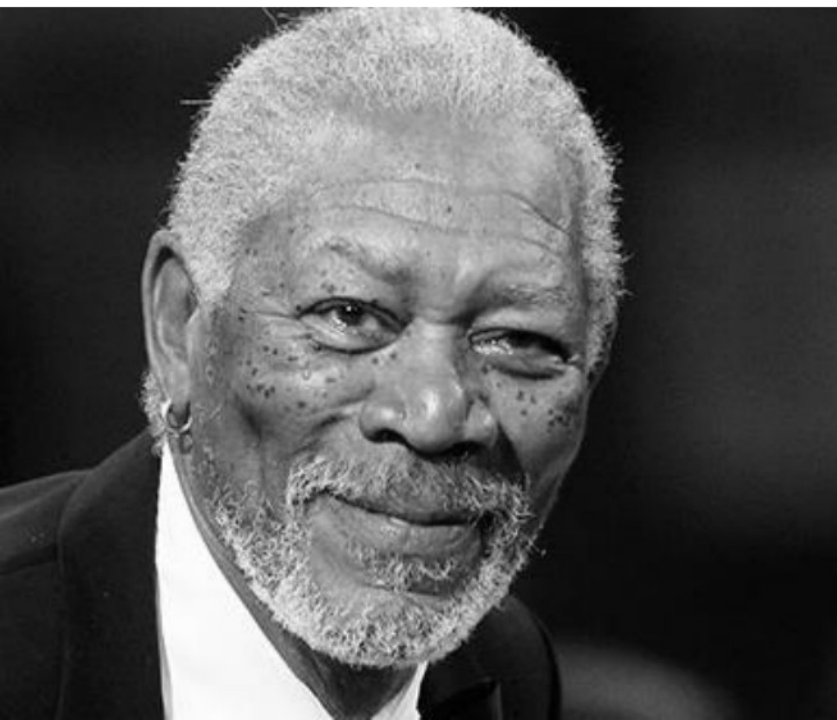
The Generations

Traditionalists — "Knowledge is my Currency"

Baby Boomers

Generation X

Millennials — "Hello! I am changing the world – can you keep up with me?"

Gen Z

Traditionalist

76-93 Years of Age

7% of the U.S. Population

Less than 1% of the Federal Workforce

Civic Minded

Loyal to their Employer

Thrifty

See Themselves as Innovators – Vaccines, Space Program, Civil Rights (MLK, Little Rock Nine)…

Have Fun at Work - After the Work is Done

Promotion and Advancement Linked to Tenure and Accomplishments

Deep Respect for Organizational Hierarch and Authority

Logical and Sequential Thinkers

Believers in Process – Seek Consistency

WYSIWYG's

Knowledge is my Currency

Baby Boomers

57-75 Years of Age

23% of the United States Population

Organizationally Influential - 31% of the Federal Workforce

Economically Influential - 70% of Disposable Income in the United States is Controlled by Boomers

See Themselves as Change Makers

Kings & Queens of Political Savvy

Lead by "Group Consensus"

Challenge Authority – Don't Like "Public Challenges"

Defined by Work Experience - Defined by Past Accomplishments

Competitive

Like Securing Perks

Generation X

41-56 Years of Age

22% of the United States Population

44% of the Federal Workforce

Independent Workers – Push Back on Group Think

Often Appear Distrustful of an Organization

Focus - Balancing Work & Life

Technologically Savvy

More Often Interested in Results over Process

Communication Skills Sometimes Lack Polish

Organizational Truth Tellers (self appointed)

"It's about work/life balance…"

"Trust but verify…"

For Gen X – There is Nothing New Under the Sun
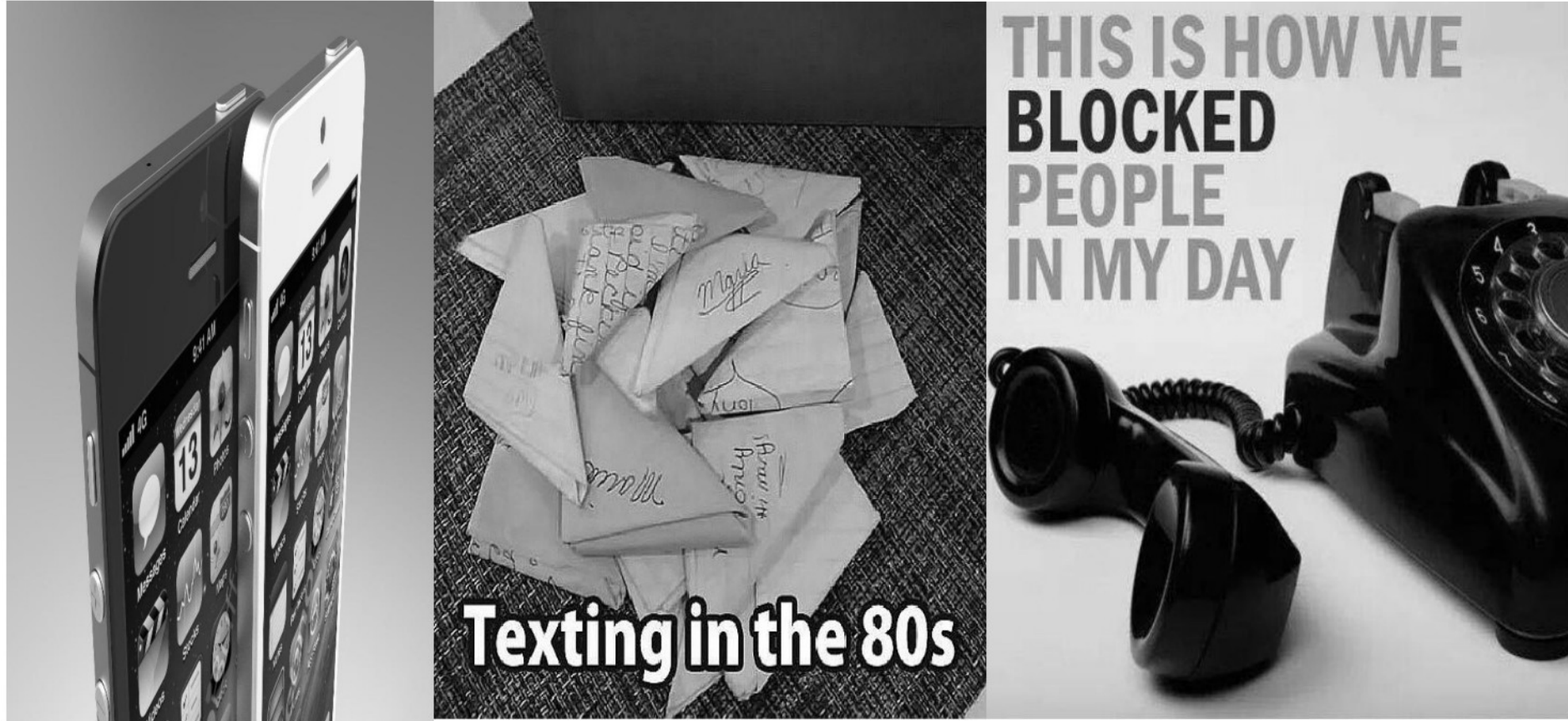
Millennials

- IB Graduate
- Undergrad in 3 yrs
- Pursuing Masters
- Business Owner
- World Traveler
- Great Daughter
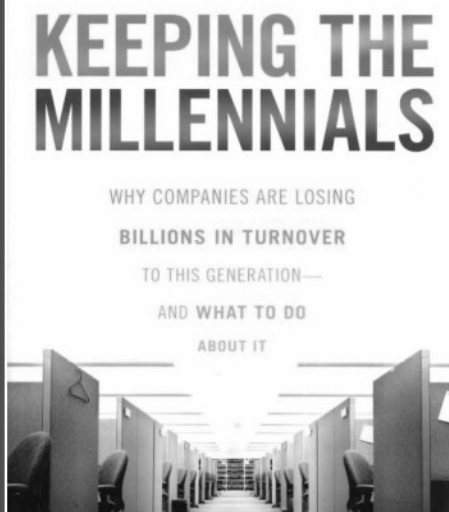
Millennial Fascination
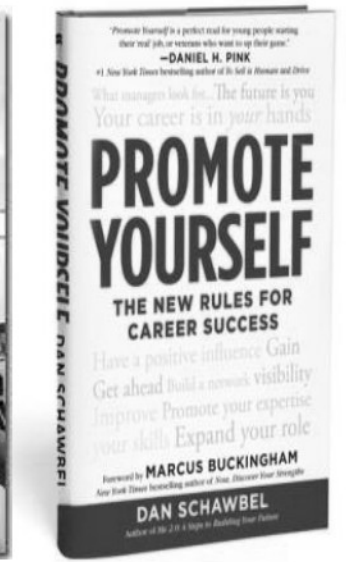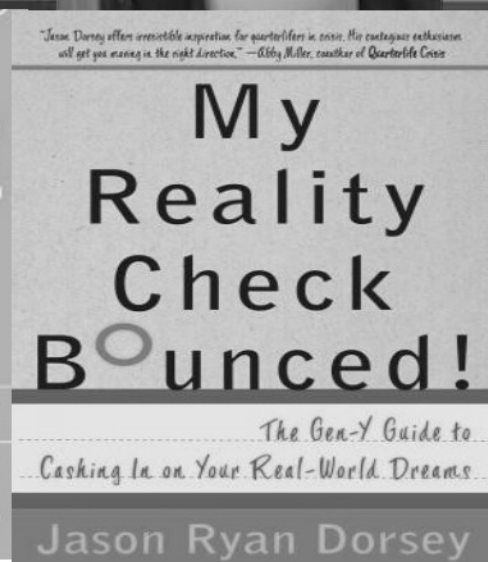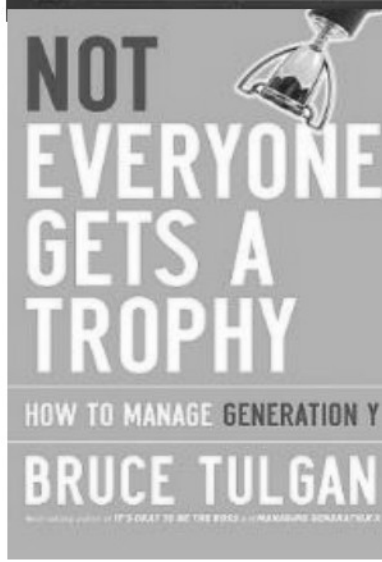
Millennials

- IB Graduate
- Undergrad in 3 yrs
- Pursuing Masters
- Business Owner
- World Traveler
- Great Daughter

25-40 Years of Age

24% of the United States Population

24% of the Federal Government

Driven, Entrepreneurial & Impatient

Most Educated Generation

Most Technologically Savvy Generation

Most Programmed Generation

Values Education Over Experience

Trouble Dealing with Prolonged Adversity

Generation Z

9-24 Years of Age

23% of the United States Population

Less than 1% of the Federal Government

More Racially and Ethnically Diverse

Particularly hard hit during the Pandemic – 50% have lost their jobs

See Government as a Problem Solver

Emphasize Individual Expression & Entrepreneurship – "Side Hustle"

Don't Remember/Didn't Experience 9-11

Highly Analytical and Pragmatic – Looking for Algorithms, Formulas – Sequential in Nature

Culture is Something You Create, Not Just Something You Experience – "Everyone is an Influencer"

The Workplace Must Be Diverse and Inclusive - Full Stop.

Experience Life Visually – Appreciates Storytelling

Communicate Preference - Video, Text and Emoji's over Email

Pandemic Huge Impact - Most Stressed-Out Generation in History

So, what can you do as an employee of the United States Department of Education to help **build and sustain** an Inclusive Multigenerational Workplace?

Focus on Trust

The Department of Education Inclusive Intergenerational Trust Building Process

```
                    ┌─────────────┐
                    │ Trust Self  │
                    └─────────────┘
                   ↙               ↘
        ┌──────────────┐         ┌──────────────┐
        │    Trust     │         │ Trust Others │
        │ Organization │         │              │
        └──────────────┘         └──────────────┘
                   ↘               ↙
                    ┌─────────────┐
                    │ Trust Team  │
                    └─────────────┘
```
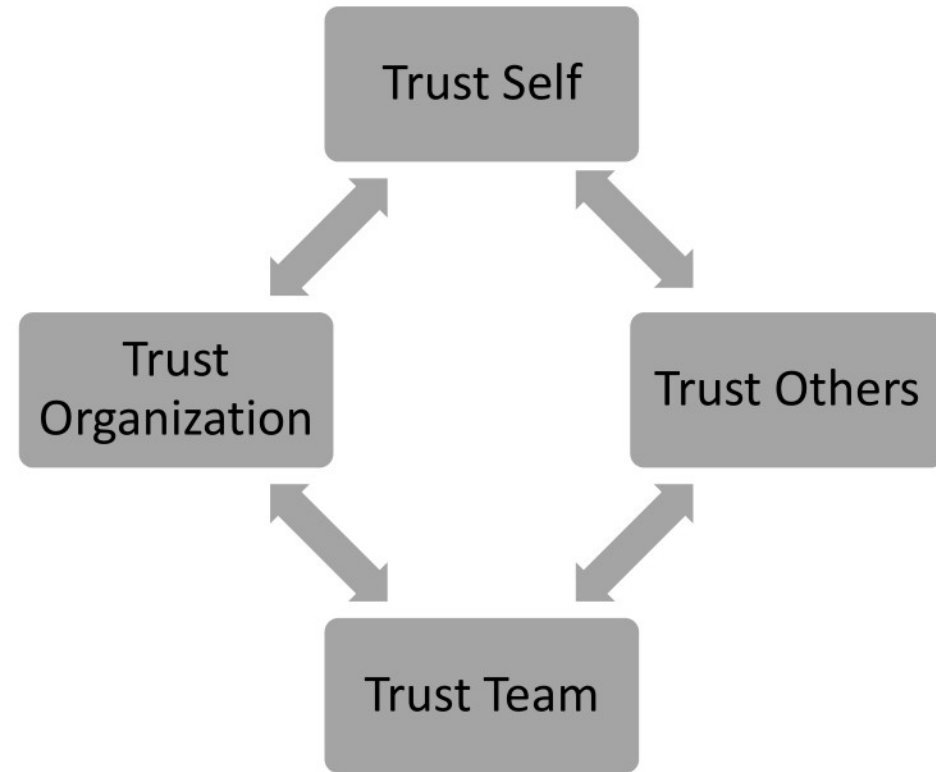
Trust Yourself

How do those who work alongside you know that you trust yourself?

How do you demonstrate "confident humility?"

"…a successful person never loses, they either **win or learn…**" - John Calipari Basketball Coach, University of Kentucky

Trust Others

External Influences

Trusting Others in Practice

Peers/Peer Networks

Online Network (LinkedIn)

Academic and Practitioner Partners

Establish a Personal Board of Directors

Relational
Vulnerability

Trust Your Team

"...Listen, stay
curious, be honest,
keep information
confidential..."

Connect   Contribute   Challenge

Build Intergenerational Inclusion Within Your Team

Practice Active Listening – Show Patience

Share Credit

"Eulogize Before You Criticize…"

Trust Your Organization

"People need to see that you trust your organization before they give you their trust…"

Moments of Crisis,
Change in Direction,
Time for Innovation….

Demonstrate Organization Trust

Give Your Organization a Level of Grace – no Rulebook on "Striving During a Pandemic"

Support and Encourage Team Dialogue on Issues/Bring Out Multiple Perspectives

Voluntarily Engage in and Promote Department of Education Programs and Initiatives – Be Overtly Present
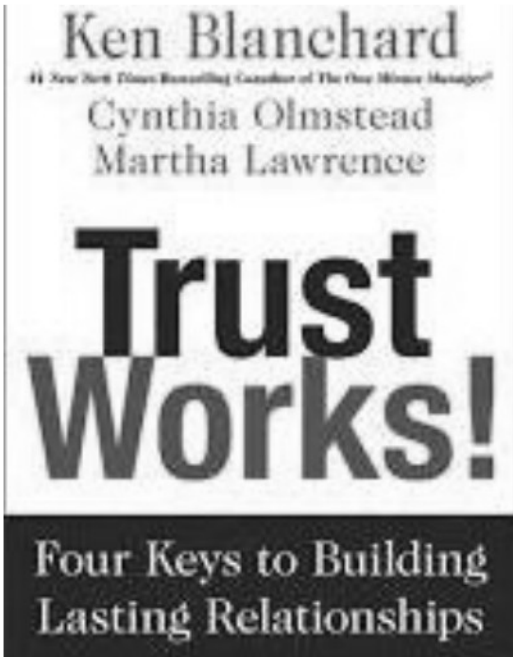
Adopt an Intergenerational "Trust Model"

Book Recommendation

"Trust Model" - ABCD Trust

Able	Believable	Connected	Dependable
Demonstrates competence	Acts with integrity	Demonstrates care and concern for other people	Reliable, follows through on what they say they will do
Gets things done	Creates and follows fair processes	Shares information about themselves	Accountable for themselves
Produces results	Treats people equally	Inquisitive about others	Organized
Has relevant knowledge regarding people, process, and resources	Acts consistently in a value-driven manner	Act as a "real person"	Predictable

Individual Behaviors, Practices, and Habits:
Building an Inclusive Intergenerational Workplace

Inclusive Intergenerational Behaviors to Practice and Master (Staff)…

Ask

- Ask Questions of Different Generations – Be genuinely Curious/Listen Deeply

Invite

- Invite Multigenerational Opinions/Engagement

Acknowledge and Address

- Acknowledge and Address Generational Tension – Own Your Perspective

Amplify

- Amplify the Ideas and Contributions of Individuals from Different Generations

Inclusive Intergenerational Behaviors of Effective Leaders

Intentionally Create Intergenerational Teams and Workgroups

Market and Promote the Value of Multigenerational Teams

Seek Multigenerational Perspectives on Programs, Projects, and Initiatives

Confront and Address Intergenerational Conflict and Tension

Design, Develop and Deploy a Multigenerational Approach to Providing Employees Praise, Acknowledgement, and Awards

Encourage the Building and Sharing of Generational Knowledge

Promote and Practice Courage and Vulnerability in the Multigenerational Workplace

Courage

Vulnerability
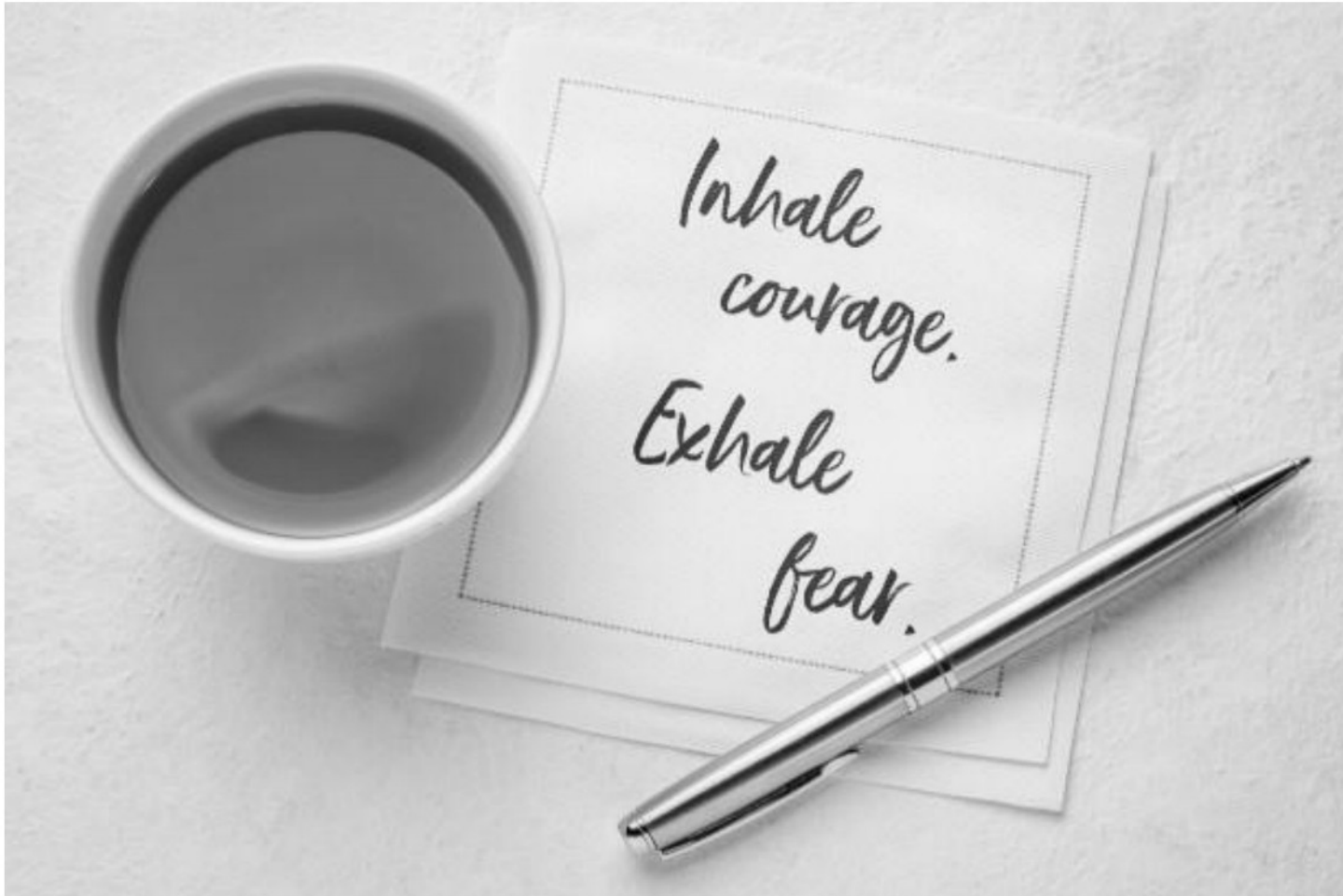
Promote and Practice Courage and Vulnerability in the Multigenerational Workplace

Courage

- Lean into generational tension
- Identify things you want to learn from another generation
- Seek and be a part of an intergenerational mentor/mentee engagement

Vulnerability

- Identify/Speak about a "learning moment" that you had on an intergenerational team
- Put yourself in a position where you are being led by someone outside of your own generation

Transcend Inclusive Intergenerational Behaviors and Practices to Inclusive Intergenerational Habits

Quick Primer - "Habit Loop"

Habits create neurological cravings (i.e. - desire for endorphins).

- **CUE**
  - Trigger can be anything (i.e. visual, time of day, company that you keep, etc.). that tells your brain to go into automatic mode and what habit should be summoned.

- **ROUTINE**
  - Things you do repeatedly – can be physical, mental or emotional, can be both simple and complex.

- **REWARDS**
  - Brain determines if it's worth it to continue to do the thing you are doing and do it the same way.
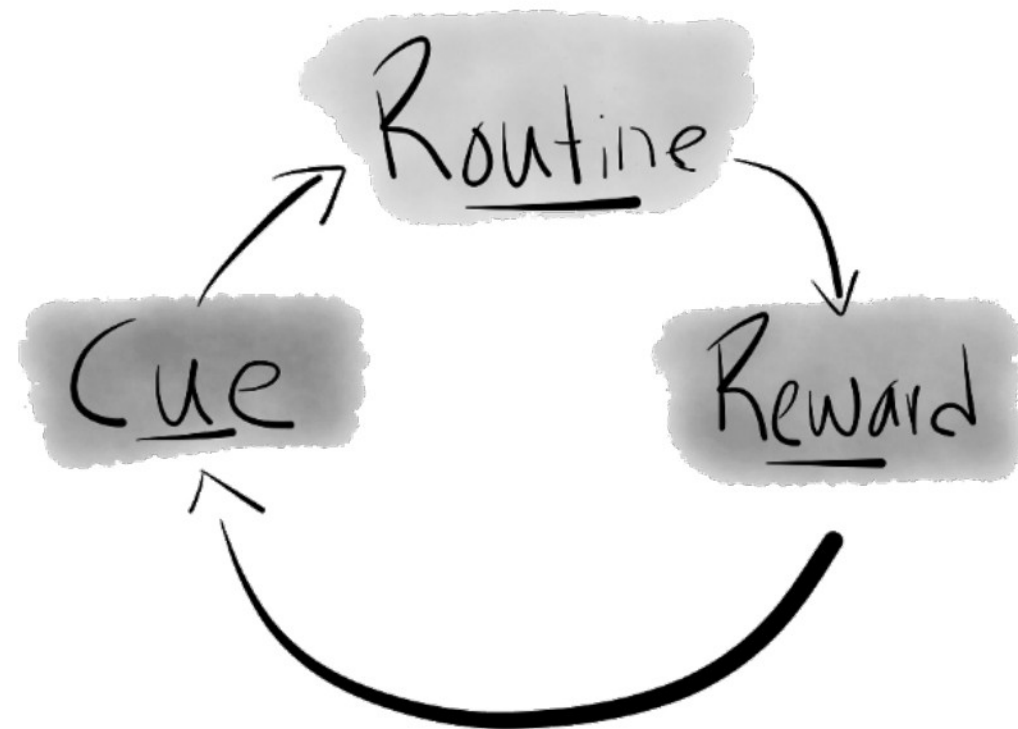
Example - Creating Inclusive Intergenerational Habits Through a "Habit Loop"

- **MULTIGENERATIONAL CUE**
  - Need for Multigenerational input/engagement

- **ROUTINE**
  - Volunteer/participate on multigenerational teams
  - Provide input/experience intergenerational collaboration

- **REWARDS**
  - Personal Satisfaction/External Recognition
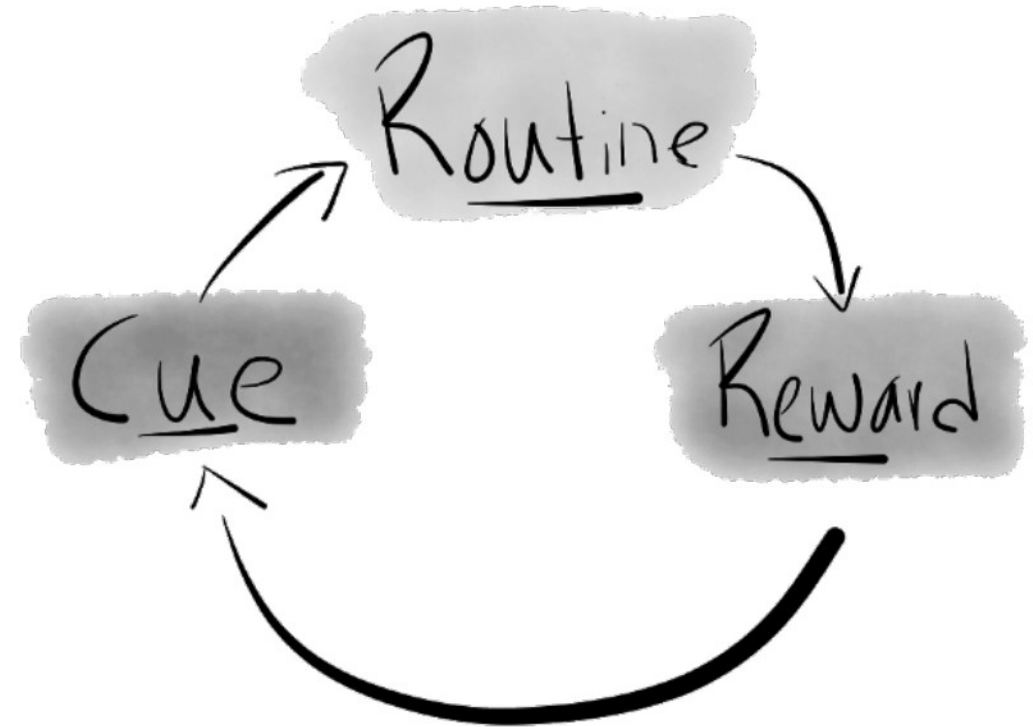
Truth:
Intergenerational Inclusion Encourages Diversity of Thought and Ideas

Inclusive Intergenerational Workplace Tools

Tool I - Chart

How to Build an Inclusive Intergenerational Awards Program

Building Tool: Inclusive Multigenerational Awards Program

Generations	Award Announcement, Programmatic Marketing	Nomination and Selection Process	Awards Program	Post Awards Activity
Traditionalist	Email, flyers, tabletop announcements, word of mouth.	Committee, senior leaders, individuals of influence in the workplace/industry, should include highest level of leadership.	Formal plaque provided - senior leader gets as much credit as the awardee. Formal award presentation expected, presentation of award should be done with great humility.	Chair of selection committee or senior leader sends handwritten thank you note to awardee.
Baby Boomers	Email emphasizes award prestige/sponsor, seek large number of applicants. Word of mouth preferred.	Committee, senior leaders. Seniority plays a role in "who gets to participate" in the selection process and whether votes should be equal or weighted. Committee anticipates some sort of recognition for the work they are going to do.	Formal plaque and includes the three P's: picture, plaque, pose with the highest-level leader in the organization and a speech given by the same leader where he/she provides some additional recognition.	Will look for a personal thank you note, call, or email from relevant award committee members and others. NOTE: Award should be able to be "displayed" in an office/virtual background.
Gen X	Short email, with a link to an online nomination form (fillable PDF). Announcement emphasizes awards criteria, process for selection and deadline(s).	Committee (should be small), mix of leaders and staff should be on the committee. Specific guidelines or SOP for committee would be expected. SOP would outline roles, responsibilities, and expectations of each member and the committee. Vetting can take place in person or online.	No formal plaque required - Limited number of awardees, limited number of program participants. Short service preferred; group award recognition preferred.	No expectations of a post award follow up – any contact between selection committee and awardee will be informal and casual/cordial. No need to display in the office.
Millennials & Gen Z	Announce on multiple social media platforms at the same time, encourage employees to forward announcement to coworkers. Appreciate announcement is made via video with links to the application.	Nomination and selection process should be done online. Role of the committee regarding the vetting process should have "room for change" (expanded or contracted) based on vision of the committee. Applicant tracking should be completed and reported out on a real-time basis. Committee is made up of employees at all levels, and would NOT be chaired by a senior leader.	Awards program should be shown on zoom/Facebook/YouTube and Instagram. Program should allow for non-traditional awards recognition and spontaneous participation. Individuals outside of the organization should be able to participate.	Will look for follow up thank you call/visit/text/email from selection official. NOTE: Award should be able to be "displayed" in an office/virtual background. Program recorded and access/link to awards program online.

Tool II – How to Build an Inclusive Intergenerational Development Plan

Guidelines - Building an Inclusive Intergenerational Development Plan

Involve
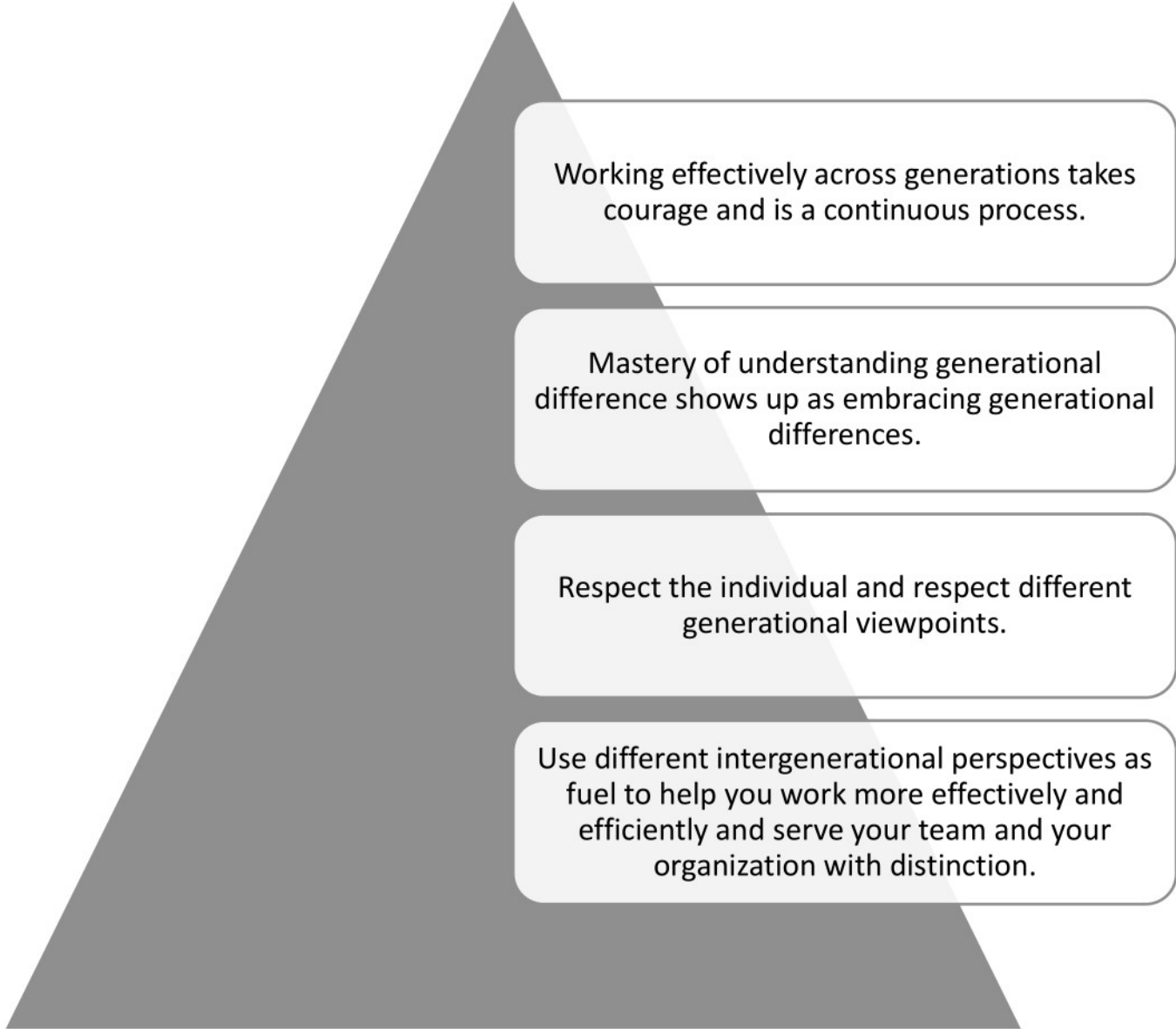
- Involve your "trusted team" in developing the plan.

Aware

- Be on the lookout for your own generational preferences in the development, execution, evaluation of the plan. Think beyond your own comfort zone.

In Closing…

Some Thoughts on Leading and Working Across Generations

Working effectively across generations takes courage and is a continuous process.

Mastery of understanding generational difference shows up as embracing generational differences.

Respect the individual and respect different generational viewpoints.

Use different intergenerational perspectives as fuel to help you work more effectively and efficiently and serve your team and your organization with distinction.

Share Your Insights...

In the chat box, identify one or two thoughts, ideas, or actions you plan to take as a result of this workshop.
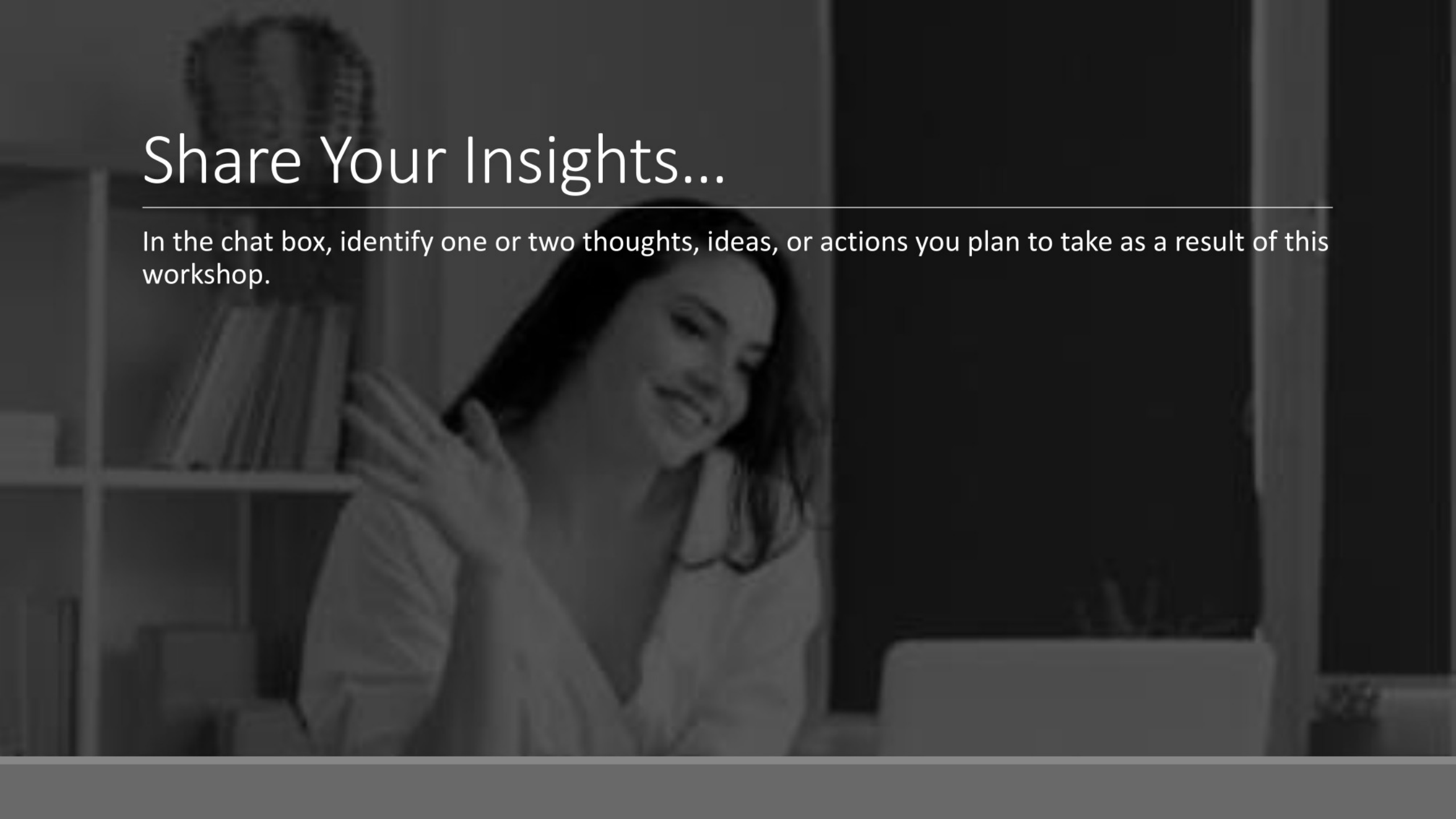
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Pictures - All Pictures are Creative Commons (CC) Licensed from canva.com

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Appendix

Exhibit the Five
Core Traits of a Trusted Intergenerational Leader

Honesty   Integrity   Focus   Vision   Humility

Enhance Inclusive Intergenerational Trust...

Demonstrate Your Belief in Other People	Seek Input from Others	Focus on Humility

Employees Naturally Trust Leaders Who Have These Powerful Habits (Inc. Magazine 2017)

Inclusive Multigenerational Engagement & Retention Techniques

Create & Support	Create & Support an Intergenerational Retention Team
Create and Deploy	Create and Deploy an Intergenerationally Aware Exit Survey
Create	Create a Video Testimonial Library of a "Day-In-the-Life" of Employees
Create	Create an Organization "Alumni" Network for individuals who are no longer employed with the company but could serve as mentors.

"…Trust is achieved by paying attention to others, listening to their ideas, and by giving gestures of genuine care and connection."

Brene Brown

An Inclusive Intergenerational Organization is Built with the Bricks of Authenticity and Vulnerability

Individual Keys to Building an Inclusive Intergenerational Organization

Awareness

Intention

Practice/Adjustments

Behaviors of an Inclusive Multigenerational Organization

Promotes	Promote Intergenerational Curiosity and Awareness
Addresses	Addresses Intergenerational Tension
Practices Refines and Adjusts	Practices, Refines, and then Adjusts its approach to Building and Sustaining an Inclusive Multigenerational Workplace

The Art of Inclusive Leadership

*Leveraging Your Role as a Leader to Develop and Sustain
an Empowered and Diverse Workforce*

OFFICE OF EQUAL EMPLOYMENT OPPORTUNITY AND DIVERSITY

DIVERSITY PROGRAM

UNITED STATES uspto

Welcome!

Interviewer : do you have any experience in a leadership role?

Me : well, I am the admin for a Whatsapp group

Level-setting: Definitions

➢ **Diversity** = Having a seat at the table

➢ **Inclusion** = Having a voice

➢ **Belonging** = Having that voice be heard

All three are equally important to have in an organization.

What *Is* Inclusion/Inclusivity?

What Makes an Inclusive Leader?

Prior Workshops Recap: Types of Leaders

Traditional

- Autocratic
- Laissez Faire

Transactional

- Transactional

Transformational

- Participative
- Democratic
- Situational

Q1: Which is your "default" style?

Q2: To which category does the inclusive leader belong?

The Goal: Inclusive Leadership

Inclusive Leadership model created by The Soul of Business.

Major Characteristics of Inclusive Leaders

➢ Committed

➢ Brave/Courageous

➢ Aware of Biases

➢ Curious

➢ Culturally Competent

➢ Collaborative

Inclusive leaders have a high Emotional Intelligence quotient (EQ)!

Emotional Intelligence and Inclusive Leadership

➤ **Emotional Intelligence** is a necessary key ingredient to effectively lead people, who then manage processes

➤ It is the level of your ability to understand yourself *and* others, what motivates you *and* them and how to work cooperatively with them to achieve results.

➤ **Your EQ is directly related to how well you are able to lead others.**

Emotional Intelligence and Inclusive Leadership (con't)

➢ **Do You have a high EQ?**

- **Self-awareness –** Awareness of your emotions and capabilities

- **Self-regulation –** Self control, conscientiousness, adaptability

- **Motivation –** Determining commitment, optimism and drive

- **Empathy –** Recognizing how others feel; anticipating needs

- **Social/Interpersonal Skills –** Soft skills (negotiating, influencing, collaboration, networking)

Inclusive Leadership: Commitment

➢ Inclusive leaders have a **deep sense of fairness**

➢ **Devote time, energy and resources** toward creating a culture of value and belonging; this aligns with their values

➢ **Able to combine *intellect*** (business case for D&I) **with *emotion*** (viewing people as more than resources)

Inclusive Leadership: Bravery/Courage

➤ Inclusive leaders:

- **Challenge** entrenched cultures and accepted thinking/practices
- **Act** on their convictions and principles (personal risk-taking)
- **Recognize** their limitations and seek feedback to overcome those limitations
- **Admit to and learn from** mistakes
- Hold themselves and others **accountable**

Inclusive Leadership: Aware of Biases

➢ **Inclusive leaders know:**

- Biases inhibit objective decision-making; and
- Promote self-cloning
- Not sharing authority, power or credit is discouraging and damages relationships

➢ **They make an effort to:**

- Set aside their personal interests and agendas
- ID their own biases to prevent them from influencing decision-making
- Develop and implement policies/processes to prevent organizational biases

Inclusive Leadership: Curious

➢ Inclusive leaders are **lifelong learners**

- Open-minded
- Like to be exposed to new/different things and ideas
- Get bored with the status quo
- Want to know about others
- Set stretch goals for themselves and others
- Seek to improve themselves (always evolving)

➢ Engage in respectful questioning

➢ Refrain from making fast judgments

Inclusive Leadership: Culturally Competent

➢ Inclusive leaders are culturally intelligent and **promote cultural competence** by:

- Demonstrating self awareness of their own culture and perceptions of it by others

- Learning about other cultures

- Practicing the ability to understand, communicate with and effectively interact with people of other cultures

➢ Are aware of how stereotypes can be a negative influence and seek to learn and share their knowledge with others

Inclusive Leadership: Collaborative

➢ Inclusive leaders are able to work through and with others to achieve goals by:

- **Communicating** clearly, often and in a timely manner
- **Empowering and developing** others
- **Unifying** individuals by creating a group identity and shared goals
- **Creating line-of-sight** to provide purpose and meaning
- **Understanding** how different thinkers respond to change and mitigating negative emotions
- **Devising intentional opportunities** for creativity/innovation

Transforming Into an Inclusive Leader

➤ Being placed in a position of leadership is often where individuals plateau and rely solely on their default styles

➤ **There is a difference between being in a position of leadership and being a leader!**

➤ A continual process of evolution—both personal and professional—is necessary

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Ways to Become an Inclusive Leader

➤ **Learn more about yourself and others** via assessments:

- Meyers-Briggs Personality Type Inventory® (MBTI)

- Dominance, Influence, Steadiness and Conscientiousness® (DiSC) Assessment

- Riso-Hudson Enneagram Type Indicator® (RHETI)

Ways to Become an Inclusive Leader (con't)

➢ *Intentionally* **connect with others**

- Invite coworkers out for coffee or lunch
- Offer to listen, without judgment, to a problem, situation or story
- Encourage someone with a compliment or affirmation
- Leave a thank you note
- Leverage humor
- Create opportunities for brainstorming and creativity

Ways to Become an Inclusive Leader (con't)

➢ **Learn about people, places, customs and cultures that differ from your own**

- Join an Employee Resource Group (ERG) or Affinity Group
- Participate in Special Emphasis Month observances
- Make an effort to understand about the challenges, successes and contributions of other communities
- Watch foreign-language television shows for films, or listen to music from around the world
- Study a new language (start with basic phrasing)

Remember: Respectful questioning is never a bad thing!

Ways to Become an Inclusive Leader (con't)

➢ **Reach up/across:** Work with a coach or mentor to help identify areas needing improvement or to solicit guidance

➢ **Reach back:** Become a coach or mentor to someone else

➢ **Become an Executive Advisor or Champion** for an ERG or other employee group

Ways to Become an Inclusive Leader (con't)

➤ **Keep enhancing your EQ**

- The higher your EQ, the better your overall leadership skills

➤ **Never stop learning or evolving**

- Continue assessing yourself and making adjustments
- Read as much as you can (e.g., books, articles, magazines, etc.)
- Research leadership styles, particularly inclusive leadership

Questions

Contact Info

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The findings and conclusions in this presentation are those of the author and do not necessarily represent the official position of the U.S. Patent and Trademark Office, an agency of the U.S. Department of Commerce.

Activity

Take the next 2-5 minutes to **write down five things** that make you uniquely you. You may include:

- Physical attributes
- Intellectual attributes
- Creative attributes
- Alma maters, degrees and/or certifications earned
- Breadth of expertise
- What you excel in
- What you do not excel in
- And so on...

There is ***no wrong way*** to create your list!

Be ready to share a little about yourself to the larger group.

What Is Diversity?

Diversity Iceberg Model

Level-setting: Definitions

➢ **Diversity** = Recognizing the individual differences within a person *(Having a seat at the table)*

➢ **Equity** = Fairness and access to equal opportunities in policies and programs

➢ **Inclusion** = Ensuring all people feel welcomed and appreciated for who they are *(Having a seat and a voice)*

➢ **Accessibility** = Practice of making information and facilities usable by as many people as possible

All are equally important to have in an organization.

Diversity Is Not …

➢ Compliance;

➢ Tolerance or sensitivity;

➢ Special treatment for certain groups;

➢ Charity;

➢ Solely about race, gender or ethnicity; or

➢ Ethnic/cultural celebrations.

Diversity Is ...

➢ **Discovering and appreciating where our differences and similarities exist** so we can tap into unique perspectives and gain greater access to a variety of solutions and ideas.

➢ **Fostering healthy, functional and effective relationships based on real information and experiences** shared by real people instead of relying on assumptions, labels, stereotypes, etc. to drive our thinking and interactions.

➢ **Making things better for *everyone*** by fully deploying tangible and intangible assets for better outcomes.

➢ **Taking personal responsibility for developing a culture** where everyone feels valued and included.

Emotional Intelligence: A Key Ingredient

➢ **Emotional Intelligence** is vital to creating a diverse, inclusive, equitable and accessible workplace:

- It is the level of your ability to understand yourself *and* others, what motivates you *and* them and how to work cooperatively with them to achieve results.

- It is also the clear understanding that employees bring their whole selves to work; what impacts them outside the organization will be brought into the organization

➢ Inclusive leaders know **emotional wellness** (to include work-life integration) and emotional **intelligence** are **integral components** to successful organizations

Emotional Intelligence: A Key Ingredient (cont.)

➢ **Do You have a high EQ?**

- **Self-awareness** – Awareness of your emotions and capabilities

- **Self-regulation** – Self control, conscientiousness, adaptability

- **Motivation** – Determining commitment, optimism and drive

- **Empathy** – Recognizing how others feel; anticipating needs

- **Social/Interpersonal Skills** – Soft skills (negotiating, influencing, collaboration, networking)

Incorporating DEIA into the Everyday

1. **Educate, educate, educate— yourself and others.** Dispel stereotypes through informative dialogues. Make the most of every opportunity.

2. **Be an example for others**. You are a brand ambassador of whatever you identify with. Be the kind of person others look up to, **not one with caveats added to their name.**

The world is changed by your example, not your opinion.

Paulo Coelho

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Incorporating DEIA into the Everyday (cont.)

3. *Intentionally* connect with others

- Invite coworkers for coffee or lunch
- Offer to listen, without judgment, to a problem, situation or story
- Encourage someone with a compliment or affirmation
- Send a thank you note
- Virtually check in on a sick coworker
- Leverage humor
- Create opportunities for brainstorming and creativity
- Take into account time zones when setting up meetings
- Send agendas and materials ahead of time
- Empower others to speak up

Incorporating DEIA into the Everyday (cont.)

4. Encourage creativity and innovation.

Sometimes the strangest ideas yield the greatest returns on investment. Give it a try; if it doesn't work, try something else. Try one or more creativity exercises found at UX Collective. Additionally, asking someone for their perspective on a project or problem helps others feel respected, valued and included— and will provide unique viewpoints and solutions.

Incorporating DEIA into the Everyday (cont.)

5. **Understand that if you have a brain, you have bias.** It's your brain's way of making sense of the world. Bias is not inherently "bad," but it can negatively impact decision-making by preventing you from being impartial. Learn and own your biases, then work daily to mitigate them.

6. **"Forgive" others for not being you. Great leaders develop others, they don't clone themselves.** Daily practice of self awareness and mindfulness will prevent you from inadvertently or purposefully judging and excluding others or operating in ignorance yourself.

Incorporating DEIA into the Everyday (cont.)

7. **Create a culture of belonging.** Work across invisible boundaries. Think of ways to collaborate, cross-train and encourage. Promote inclusion by:

- Using others' proper pronouns and by introducing yourself with your pronouns and graphic description in meetings.
- Add pronouns to your signature line
- Ensure all publications and meetings are 508-compliant and accessible (captioning, sign language interpreting, etc.)
- Take into account differing time zones; don't set meetings too early—remember your colleagues out West!
- Keep your introverted co-workers in mind; they need time to process information, so send agendas and read-aheads well before meetings start times, and skip the well-meaning but anxiety-inducing icebreakers.

Incorporating DEIA into the Everyday (cont.)

8. Learn about people, places, customs and cultures that differ from your own:

- Join and be active in an Employee Resource Group (ERG) or Affinity Group
- Celebrate and actively participate in heritage month observances or other special holidays and events
- Make an effort to understand about the challenges, successes and contributions of other communities
- Watch foreign-language television shows for films, or listen to music from around the world
- Study a new language (start with basic phrasing)

Remember: Respectful questioning is never a bad thing!

Incorporating DEIA into the Everyday (cont.)

9. Don't become frustrated or be intimidated. It's okay to have difficult conversations about sticky subjects when it's done with humility, respect and open-mindedness. Changing entrenched thinking and workplace cultures takes time. Be sure to celebrate the incremental successes.

10. Ensure your personal network has a lot of variety. Be sure to stay connected to individuals from different organizations, sectors, career levels, and professions to add a range of perspectives. Varying your connections enables you to tap into the many facets of your personality, range of interests, and variety of skillsets.

11. Make every effort to keep your hybrid teams as diverse, inclusive and engaged as possible. If you were already incorporating DEIA principles into your everyday work pre-pandemic, the new normal shouldn't present a huge challenge. Keep moving forward.

Incorporating DEIA into the Everyday (cont.)

12. Keep enhancing your EQ. The higher your EQ, the better your overall leadership skills.

13. Never stop learning or evolving:

- Continue assessing yourself and making adjustments
- Read as much as you can (e.g., books, articles, magazines, etc.)
- Research leadership styles, particularly inclusive leadership—because **you can lead at any level!**

Resources

Articles

- The Business Case for Diversity and Inclusion

- Fostering Diversity in the Workplace: How to Do It in 10 Ways

- Pronouns | Center for Inclusion and Social Change | University of Colorado Boulder

- How to Increase Workplace Diversity: 9 Steps

- What an Inclusive Workplace Actually Looks Like, and Seven Ways to Achieve It

- Understanding Biases and Their Impact on Our Perceptions

- NASA: Guidance for Developing Effective Employee Resource Groups (ERGs)

Resources (cont.)

Books

- Buster, Bobette. (2018). *Do Listen: Understand What's Really Being Said; Find a New Way Forward.* San Francisco: Chronicle Books.

- Kahnweiler, Jennifer B. (2020). *Creating Introvert-Friendly Workplaces: How to Unleash Everyone's Talent and Performance.* Oakland: Berrett-Koehler Publishers, Inc.

- Walton, David. (2012). *Emotional Intelligence: A Practical Guide.* New York: MFJ Books.

Websites

- 16 Personalities: https://www.16personalities.com/free-personality-test

- The Enneagram Institute: https://www.enneagraminstitute.com/

Resources (cont.)

DEIA-related Executive Orders & Legislation

- E.O. 13985 "Advancing Racial Equity and Support for Underserved Communities Through the Federal Government"
- E.O. 13988 "Preventing and Combating Discrimination on the Basis of Gender Identity or Sexual Orientation"
- E.O. 14031 "Advancing Equity, Justice, and Opportunity for Asian Americans, Native Hawaiians, and Pacific Islanders"
- E.O. 14035 "Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce"
- E.O. 14041 "White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity Through Historically Black Colleges and Universities"
- E.O.14045 "White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity for Hispanics"

Resources (cont.)

DEIA-related Executive Orders & Legislation (cont.)

- E.O. 14049 "White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity for Native Americans and Strengthening Tribal Colleges and Universities"
- E.O. 14050 "White House Initiative on Advancing Educational Equity, Excellence, and Economic Opportunity for Black Americans"
- E.O. 13171 "Hispanic Employment in the Federal Government"
- E.O. 13562 "Recruiting and Hiring Students and Recent Graduates"
- E.O. 13583 "Establishing a Coordinated Government-wide Initiative to Promote Diversity and Inclusion in the Federal Workforce"

Resources (cont.)

DEIA-related Executive Orders & Legislation (cont.)

- E.O. 13473 "To Authorize Certain Noncompetitive Appointment in the Civil Service for Spouses of Certain Members of the Armed Forces"
- E.O. 13518 "Employment of Veterans in the Federal Government"
- E.O. 13548 "Increasing Federal Employment of Individuals With Disabilities"
- Title VII of the Civil Rights Act of 1964
- The Age Discrimination in Employment Act of 1967
- The Americans With Disabilities Act of 1990 and Rehabilitation Act of 1973
- The Equal Pay Act of 1963

Resources (cont.)

DEIA-related Executive Orders & Legislation (cont.)

- The Immigration Reform and Control Act of 1986
- The Genetic Information Nondiscrimination Act of 2008

Questions?

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Championing Diversity™

A Proactive Approach to Workplace Diversity

Facilitator Guide
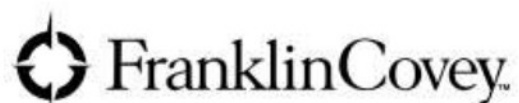
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GUARDIAN QUEST

Table of Contents

Preparation

OVERVIEW AND LEARNING PROCESS

Welcome to *Championing Diversity: A Proactive Approach to Workplace Diversity*. FranklinCovey has designed this workshop to be taught in 8 hours (6½ hours of instruction, plus breaks and lunch). You will be teaching participants with varied demographic, economic, and educational backgrounds. This section contains a few tips to help you facilitate this workshop effectively to the audience.

LEARNING PROCESS

The content presented in this workshop will profoundly impact people's lives. Your thorough understanding of the material is critical to taking the participants through this journey. Learning is a lifelong process of taking in information, implementing it, and turning the information into knowledge and life wisdom.

We suggest reminding participants several times throughout the workshop that turning the information they will explore into action plans, with measurable goals, will take patience and time. Make sure participants know this is a growing process.

TEACHING APPROACH

Traditionally, the world of teaching has been overwhelmingly dominated by a lecture approach. However, most of this content does not lend itself well to this teaching method. Instead, we recommend you use an interactive approach. To help participants, we have balanced written material with experiential, visual-spatial, and auditory learning experiences. In addition, we have included individual and small/large-group activities.

Avoid the traditional classroom or "school" feeling with this content. Instead, build safety and comfort into your workshop to encourage participation. One way to accomplish this is to allow participants to choose whether to answer questions, read, or participate if they feel awkward. Your presentation should be fun and nonthreatening. The more comfortable you help participants feel, the more they will open up and participate.

Develop your own style as you become familiar with the material, but don't deviate from the content in the facilitator guide or the participant guidebook, except where you are asked to provide a personal example.

Before each session begins and as participants arrive, walk around and introduce yourself to the participants. Get to know why they are attending the workshop, where in the organization they work, and what they do.

SET THE TONE

Your challenge, from the onset of the workshop, is to set the tone and create an atmosphere in which sharing is safe and exciting. The first few exercises help in setting a working level of trust and camaraderie. Guide group discussions with little personal comment, unconstructive criticism, or grandstanding. This time is intended for participants to experience life-changing concepts.

If someone raises an issue that is off the subject or would take too long to discuss, you may want to note it on chart paper on the wall. Tell participants you are "parking" it in the "parking lot" to address later if time allows. Then, when you have some extra time, go back to the issue or address it directly with the participant during one of the breaks.

HOW TO USE THIS FACILITATOR GUIDE

This facilitator guide is divided into three sections:

1. **Preparation.** This section contains an explanation of facilitator resources and a complete checklist to help you prepare to conduct a successful program.

2. **Facilitation content.** These sections provide a step-by-step guide for delivering the program, complete with PowerPoint® thumbnails, exercises, two videos, and useful background information.

3. **Appendix.** This section contains additional information for facilitating the workshop.

CONVENTIONS

The following table provides the conventions used in this guide to help you facilitate the program.

Convention	Example
Steps. What the facilitator does is numbered and in bold.	**Display Slide 2, "Other Diversity Categories."**
Facilitator statements and questions. What the facilitator says or asks is in a distinct font type.	Good morning, and welcome to *Championing Diversity: A Proactive Approach to Workplace Diversity.* My name is _____. I will be your facilitator for this workshop, and I am also a "champion" of diversity within the organization.
Facilitator instructions or notes. Instructions or notes to the facilitator are in italics.	*Allow 5 minutes for discussion.*

Convention	Example
PowerPoint® slide thumbnails. These are reduced replications of slides. They are numbered to help you keep them in proper sequence.	

WORKSHOP COMPONENTS

This workshop uses the following materials:

- Facilitator kit, which contains:
    - Facilitator guide
    - Participant guidebook
    - *Trim Tab* videos
    - *Finale* PowerPoint presentation
    - PowerPoint presentation on CD
    - Certification documents
- Participant kit. All participants receive:
    - Participant guidebook
    - Pocket card with the Cornerstones of Diversity
    - CD with a copy of the *Finale* PowerPoint presentation

PREPARATION CHECKLISTS

FACILITATOR PREPARATION CHECKLIST

Use this checklist to prepare for the workshop.

☐ Read through this facilitator guide thoroughly and carefully. Although this guide provides suggestions for what to say and do, use your own creativity to present ideas and generate discussion. Put your unique stamp on the workshop using your experiences and stories (where appropriate)—and your energy.

☐ Familiarize yourself with the workshop flow, objectives, and content of each section.

☐ Review the suggested statements and questions thoroughly. You may either read them from the facilitator guide as you facilitate the workshop, or you may paraphrase the content.

☐ Reserve a training room (with one blank wall), and schedule the date and time for the workshop.

☐ Schedule audio and video equipment. (See "Teaching Supplies" on page 8.)

☐ Mentally script and practice delivering personal examples of concepts both where this guide suggests using them and where you feel they would fit best.

☐ Prepare the following before conducting the workshop:

– "My reason for being here is..." story (in the "Diversity Categories" section)

– "Personal Comfort Zone" story (in the "Expectations and Change" section)

– Story to illustrate either Cornerstone 1 or Cornerstone 9 (in "The Cornerstones of Diversity" section)

– Optional: Business case for the organization (in the "Five Reasons" section)

LOGISTICS AND SEATING ARRANGEMENTS

When logistics are handled well, they go unnoticed. Make sure your learning area is comfortable. Explore options for the optimal seating arrangement, and ensure equipment and supplies are in place and in good working condition before participants arrive. Preparing supplies is critical to promote the feeling of a relaxed and inviting atmosphere.

Ideally, this workshop was designed for a group of at least 10 and no more than 40 participants. The seating for this workshop should be in table groups with no more than 6 at each table. Large tables can sometimes get in the way of learning because, consciously or unconsciously, people may avoid being attentive. Reconfiguring the room is often helpful. Circular arrangements are desirable as long as everyone can see the facilitator, slides, chart pads, etc. Sometimes just varying the seating arrangement from section to section creates more interest and better teamwork.

WORKSHOP SETUP

Before the workshop, prepare these charts:

- ☐ "Welcome" chart
- ☐ "Other Categories" page on a chart pad
- ☐ "Introductions" page on a chart pad
- ☐ "Zones" visual on a chart pad

SCHEDULING AND TIMING

This workshop includes approximately 6½ hours of instruction, as shown in the table below, plus lunch and one morning and one afternoon break. Keep track of the time. Monitor how long you spend on one section and maintain your pace or speed up if necessary.

Section	Timing
Introduction	
Welcome and Logistics	10 min.
Diversity Categories	20 min.
The Spirit of Ubuntu	15 min.
Lifelong Learning and Introductions	25 min.
Why Is Championing Diversity Important?	5 min.
Expectations and Change	15 min.
Your Challenge	5 min.
Maturity Continuum	5 min.
Break	
What Is Diversity?	
Defining Diversity	15 min.
Principles Govern	15 min.
The Cornerstones of Diversity	25 min.
Why Is Diversity Important?	
The Five Reasons	30 min.
Lunch Break	
Championing Diversity	**1 hour 15 min.**
Valuing Differences Model	20 min.
Video: *Trim Tab*	10 min.
Diversity-Champion Commitments	5 min.
Exercise: Organizational Accountability	25 min.

Section	Timing
Reentry Responsibilities	5 min.
Finale PowerPoint Presentation	10 min.

TEACHING SUPPLIES

You will need the following materials:

- ☐ Table tents (one for each participant)
- ☐ PowerPoint presentation, laptop, and projector
- ☐ Chart pads and easels
- ☐ Markers (one for each participant)
- ☐ *Trim Tab* video
- ☐ *Finale* PowerPoint presentation on CD

Introduction

WELCOME AND LOGISTICS   **10**
MINUTES

1.   **Display Slide 1, "Title Slide."**

Insert your name on the slide before the workshop. Greet participants as they come into the room. Create a welcoming environment and put people at ease.

2.   **State:**

Good morning, and welcome to *Championing Diversity: A Proactive Approach to Workplace Diversity*. My name is _____. I will be your facilitator for this workshop, and I am also a "champion" of diversity within the organization.

I am excited to be here to share this experience with you, but even more important, for all of us to understand how important this topic is to *[name of organization]*.

Be enthusiastic but not "over the top" about this diversity initiative. Here, share your story about why you are facilitating this program, as well as your personal experience from your certification workshop and the breakthroughs you made there.

Go over logistics or "housekeeping" issues if necessary, such as length of the workshop, location of restrooms, breaks, lunch, expectations for cell phones and pagers, etc.

If applicable, read any letters or quotes provided by the organization's executives to emphasize their commitment to diversity. (Include anything that might be part of your organization's business case.)

3.   **Ask:**

How many of you have attended a diversity training or initiative in your professional career within the past 10 years—whether a full-day or half-day workshop, a brown-bag luncheon, or a week-long program?

4.   **State:**

We will approach the topic of diversity a bit differently today than you might have experienced in any previous training. This topic of diversity has taken a different direction within the past 10 years, and today it continues to be a moving target of ongoing changes in dealing with people in our everyday lives.

DIVERSITY CATEGORIES   **20 MINUTES**

1.   **Display Slide 2, "Other Diversity Categories."**
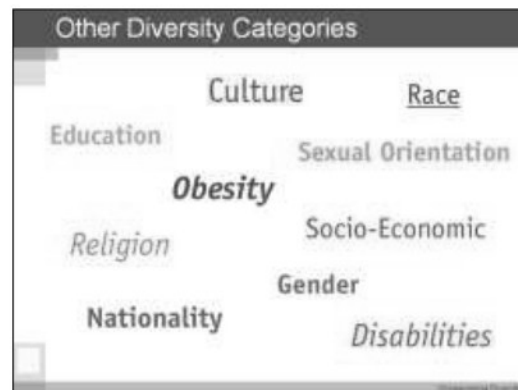
2.   **State:**

In the past, diversity programs often focused on two major categories.

3.   **Ask:**

- Can anyone tell us what those two categories were?

  Answer: Gender and race.

- Would you agree that today's world of diversity is no longer just about those two categories?

4.   **State:**

Gender and race are still key to diversity, but what other categories do we now have to be very aware of when we discuss diversity in our workplaces?

Write participant responses on the chart page labeled "Other Categories." Be sure you include gender and race. Other possible answers: Socioeconomic status, culture, religion, sexual orientation (not sexual preference), disabilities (not handicapped, because not all disabilities are visible—e.g., allergies, some eye conditions), generations/age, national origin, physical appearance (e.g., obesity, tattoos, piercings).

If you change a participant's term, be sure to say, "If I may, the diversity term for that is _____."

5.   **State:**

So as you can see, today's world of diversity has become more complex but exciting at the same time in knowing what we can learn from everyone in these categories.

6.   **Display Slide 3, "Introduction."**
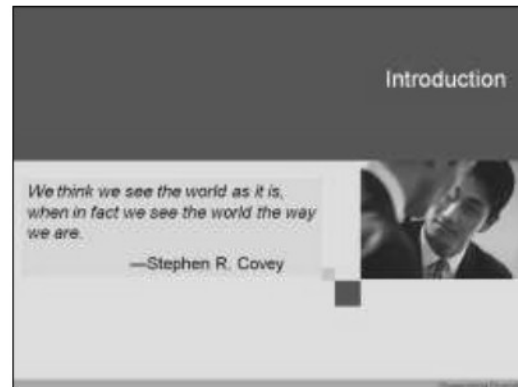
7.   **State:**

Turn to page 1 in the participant guidebook. You will use the guidebook throughout the workshop to reinforce what you learn. Please take notes in the guidebook and on the "Notes" pages at the end of most of the sections.

As you can see on page 1, we have an opening quote by Stephen R. Covey, author of *The 7 Habits of Highly Effective People*.

8.   **Ask:**

- Would someone please volunteer to read that quote to us?

  After the volunteer reads the quote, repeat it.

- What does that quote mean to you? Help me out with some responses—there are no right or wrong answers.

  Solicit responses.

9.   **State:**

As you just said, each of us looks at things through different viewpoints, different perspectives, and different windows.

Introduction

> *We think we see the world as it is, when in fact we see the world the way we are.*
>
> —Stephen R. Covey

1

17

10.   **Ask:**

- Where did our viewpoints, perspectives, and our "windows of the world" come from?

  Possible answers include: Upbringing, parents, religion, culture, work/life experiences, movies, the media, friends.

- What happens when we go through life looking at our experiences through our own window, and something hits that window that we do not know—that we have never experienced or have no knowledge of? How do we feel?

  Answers: Uncomfortable, uneasy, awkward.

- Immediately, when it hits our window, what do we say about it?

  Answers: That it is wrong, weird, different, odd.

11.   **State:**

It may not be any of those things. It may be that I have never experienced that thing in my life, but I may have formed an opinion from what I have heard.

Walk over to the "Other Categories" chart page.

12.   **Ask:**

Would you agree that many people could very easily say those things about any one of the categories on this chart?

13.   **State:**

So for today, I am going to ask you to allow me to expand your window just a bit and to be open to learning and understanding the impact of a workplace that embraces all diversity.

Share your story.

My reason for being here is...

THE SPIRIT OF UBUNTU   **15 MINUTES**

1.   **State:**

We did quite bit of research about what people ultimately want to understand about workplace diversity, and we came across a very intriguing concept that we've decided to use as the foundation for the *Championing Diversity* program.

2.   **Refer to page 2 in the guidebook.**

3.   **Display Slide 4, "The Spirit of Ubuntu."**
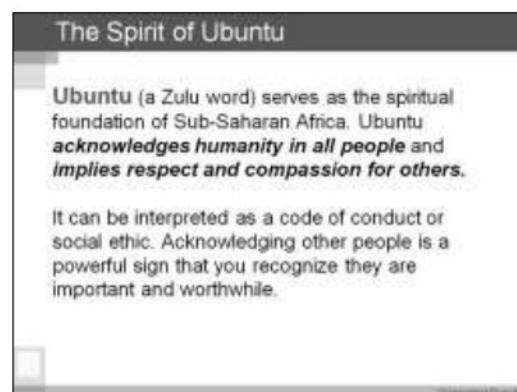
Read the definition to the group. Emphasize the phrases "acknowledges humanity in all people" and "implies respect and compassion for others."

4.   **Display Slide 5, "The Spirit of Ubuntu."**

This slide builds.

Introduction
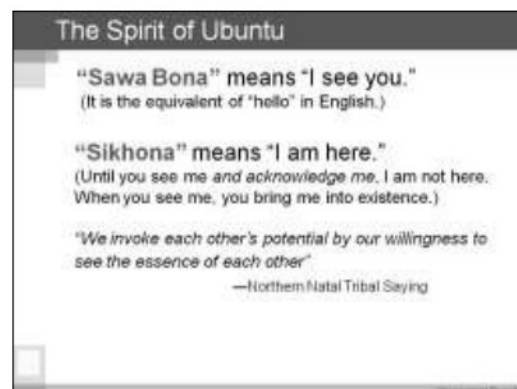
The Spirit of Ubuntu

The philosophy of Ubuntu serves as the spiritual foundation of Sub-Saharan Africa. Ubuntu *acknowledges humanity in all people* and *implies respect and compassion for others.* It is a code of conduct and a social ethic. Acknowledging other people is a powerful sign that you recognize they are important and worthwhile.

SALUTATIONS

"Sawa Bona"—I see you.
"Sikhona"—I am here. (Until you see me *and acknowledge me,* I am not here.)

We invoke each other's potential by our willingness to see the essence of each other.
—Northern Natal Tribal Saying

Define Your Value

How do you add value to your organization?

_____

_____

_____

_____

How do you add value to the lives of those you touch daily—personally and professionally?

_____

_____

_____

_____

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5.   **State:**

We understand that this "spirit" does exist in many other communities around the world, but this society was the one that gave it a name. There is a tremendous power in seeing humanity first rather than identifying labels. What makes the Zulu treatment of this concept so unique is how the Zulu people greet each other. They greet each other by saying, "Sawa Bona."

Have the group repeat "Sawa Bona" after you. This phrase is equivalent to our very simple English "Hello."

6.   **Ask:**

But how many times do we say, "Hello, how are you?" to each other but do not really mean it?

7.   **State:**

The response we usually get is, "I am fine." And that person may truly not be fine, but we sometimes just keep walking. The danger with that is when someone takes a "How are you?" literally and starts telling you. Sometimes we really do not want to know!

Build the slide to reveal the remaining text.

The difference in the Spirit of Ubuntu is the response "Sikhona."

Have the group repeat the word after you. Read the description under "Sikhona."

Until you see me and acknowledge me, I am not here. When you see me, you bring me into existence.

Emphasize the phrase "acknowledge me." Practice the greeting and response with the group several times. Reinforce the greeting by using it upon returning from breaks or lunch.

During the journey of life, we pass by all types of people every day. We do not make eye contact with them; we do not greet them; we do not acknowledge them.

8.   **Ask:**

- How many times do we pass by other people every day and we do not even give them the courtesy of a simple hello? Why does this happen? What message does it send to these people?

  Answers: We are too busy, we are distracted, we are on our way somewhere, we really don't care to do it, we don't like the person, we didn't see the person, there are too many people.

- If we continue to not acknowledge other people, after a while, what can they easily become to us when we don't see them?

  Answers: Nonexistent, invisible.

9. **State:**

    So let's bring that to real life in our work environments. In organizations, who are some people and what are some job categories that sometimes become invisible to us?

    Answers: Custodial staff, maintenance, secretaries, administrative staff, mail-room personnel.

10. **Ask:**

    And why do they sometimes become invisible to us? Let's consider the custodial staff—why?

    Answers: I don't see them, they work different shifts, they are in a lower category, they speak a different language.

11. **State:**

    But just because I don't see them doesn't mean they don't exist.

12. **Ask:**

    - When do the people in these job categories become "visible" to us?

      Answers: When something is wrong, when we need something, when we notice they didn't vacuum the night before or empty a wastepaper basket.

    - If that's the only time they become visible, how could they feel about coming into work every day?

      Answers: They do not feel valued, they do not care, they feel like they do not belong.

    - Now, let's take it into our communities. Who are some people in our communities who are invisible?

      Answers: Garbage collectors, mail carriers, grocery clerks, the homeless, toll-booth ticket takers, etc.

    - So why are these people invisible to us? Let's take homeless people. Why do they sometimes become invisible to us?

      Answers: We are embarrassed, we're concerned for our safety, we could become homeless ourselves someday.

13. **State:**

The key to all these individuals is that we don't know their story. What we may not know about any of these people is that every day, that custodial staff person, that secretary, and that mail carrier are doing their best in their jobs and delivering every day with **excellence.** But if they do not get acknowledged, we may not be getting their best every day.

Let me share with you a real incident that occurred during a *Championing Diversity* workshop.

Share the "Boston Homeless Executive" story in the Appendix.

**LIFELONG LEARNING AND INTRODUCTIONS   25
MINUTES**

1.   State:

      Learning is a lifelong process. Everyone in this room brings a wealth of
      wisdom from his or her own life and learning—a unique perspective that
      must be respected for this workshop to be productive. But to continue
      growing, each of us must also remain engaged and open to receiving new
      experiences.

      This workshop is an exploration of our hearts and minds to help us better
      understand why we say, think, and behave in a certain way.

EXERCISE: ADDING VALUE

1.   Display Slide 6, "Exercise: Define Your Value."
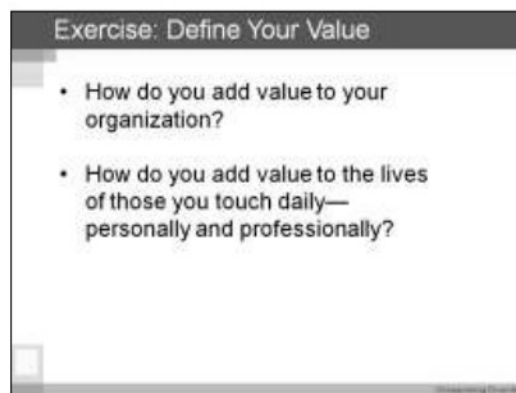
2.   State:

      We all have values that are near and dear to us—things we feel strongly
      about and that were instilled in us at an early age. In terms of what we
      each do in our organization, look at the questions on page 2 in the
      guidebook. We all have reasons for being in this organization and we all
      bring something of value to it. Answer these questions individually.

      *Emphasize that the first question does not ask what participants do at work; it
      asks, "How do you add value to your organization?"*

      *Allow about 2 minutes for participants to write their answers. If the group is large,
      have them answer only one question on page 2.*

29

3.   **State:**

In your table groups, introduce yourself to your tablemates and share your response to the question "How do you add value to your organization?" If you do not understand what someone means by his or her value, feel free to ask questions.

Allow about 3 to 4 minutes for this part of the exercise.

4.   **Ask:**

What did this exercise allow you to observe or identify?

Answers: We heard part of someone's story, someone's perception, someone's contribution.

5.   **State:**

To make everyone who is in today's workshop visible, I would like you to identify two words you would use to describe yourself—two of your attributes. Write those two words in the margin on page 2 in the guidebook.

Allow about 1 minute for writing.

EXERCISE: PARTICIPANT INTRODUCTIONS

1.   **State:**

I would like everyone to introduce yourself to the entire group. Share with us your name, where you work in the organization, and one of the two words you used to describe yourself that you wrote in the margin on page 2.

As participants share their words, record them on the "Introductions" chart page. Write the words randomly on the page. Use a different marker color for each table group.

2.   **Ask:**

*   Are the majority of these words positive or negative?

    Most will be positive.

*   But even though the majority of the words are positive, would you agree that someone could very easily turn that positive word into a negative about you?

3.   State:

Within one or two seconds of meeting someone, you identify 10 to 15 things about him or her that shape your opinion.

4.   Ask:

And would you agree that sometimes we never get past that first impression?

Give an example: "One of you said you were friendly—but I saw you the other day and you didn't seem very friendly. You didn't even say hello. Not too friendly!"

5.   State:

Let's take one more look at the essence of Ubuntu. I invite you to write the following statement in the margin of your guidebook.

6.   Display Slide 7, "The Essence of Ubuntu."
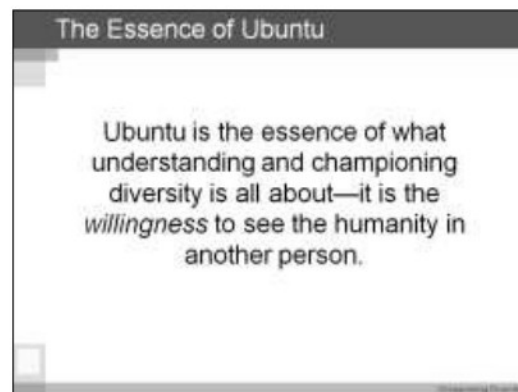
7.   Ask:

What do you think is the key word in this statement?

Answer: Willingness.

8.   State:

Please circle the word "willingness."

9.   **Ask:**

Who owns the word "willingness"?

10.   **State:**

We know what we should do, but many times we do not want to—we want someone else to take care of it. It is the responsibility of each of us to "see" each other, and it is our responsibility to be seen.

WHY IS CHAMPIONING DIVERSITY IMPORTANT?   **5**
MINUTES

1.   Have participants turn to page 3 in the guidebook.

2.   Ask:

   • What outcomes do organizations want from championing diversity?

   • What does *[name of organization]* want from the investment in today's workshop?

3.   Display Slide 8, "Why Is Championing Diversity Important?"

This slide builds.

4.   As you build the slide, state:

   • **Live their values and principles.** This goes beyond just posting them on a wall. Do people know them and can they define what they mean? Understanding diversity should become part of the organization rather than just a workshop for compliance.

   • **Keep pace with current demographic trends and reflect their customer and investor base.** Do we represent the communities, the customers, and the clients we serve? Who's missing in this room? in our organization?

   • **Eliminate litigation costs.** Diversity training will not eliminate all costs, but it will decrease them while educating the workforce on rights and wrongs.

   • **Enhance productivity by tapping into every employee's skills.** This means we will walk out of here, identify all those who are "invisible," and take responsibility to help them become visible— both on a personal level and an organizational level.

Why Is Championing Diversity Important?   Introduction

Organizations that embrace diversity:

- Live their values and principles.
- Keep pace with current demographic trends and reflect their customer and investor base.
- Eliminate litigation costs.
- Enhance productivity by tapping into every employee's skills.
- "Shake loose" from old ways of thinking.
- Create synergy through diversity.
- Grow future leaders.

3

- **"Shake loose" from old ways of thinking.** Once I have taken diversity training, I am done forever—I have my compliance check mark. Diversity training should be ongoing. Or have you ever shared an idea and someone responds, "No, we've always done it this way"? What happens to your idea? It goes away.

- **Create synergy through diversity.** Until we recognize the unique contributions of everyone, we could be missing out on some valuable talent. Individually, we do great work; together, we do greater work.

- **Grow future leaders.** Who will be your replacement? Which generation will that person come from? Baby Boomers are starting to leave the workforce; Millennials are coming in. We are pinching ourselves in the middle, like an hourglass.

5. **Transition by stating:**

   Let's look at some of the expectations we have for this workshop and how we can create and embrace change in order to meet them.

| EXPECTATIONS AND CHANGE | 15 |
| MINUTES | |

WORKSHOP EXPECTATIONS

1.   **Display Slide 9, "Expectations."**

This slide builds.

2.   **State:**

Please turn to page 4 in the guidebook. Here is what you can expect from this workshop. The ultimate goal for us as an organization is to create a deeper commitment to diversity to truly value all people.

Quickly review the Know, Do, and Feel information on the slide and page 4.

3.   **Ask:**

So how do we create and embrace change to meet the expectations?

CHANGE

1.   **Display Slide 10, "Change," and read the first statement on the slide.**
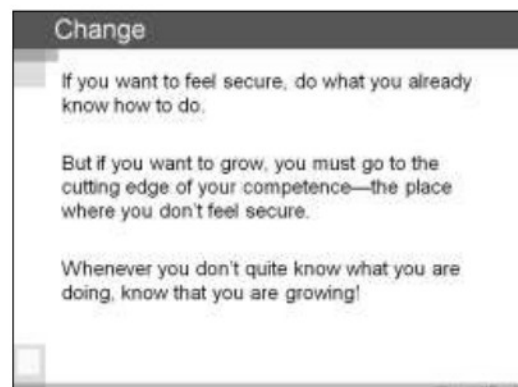
Introduction

Expectations

You can expect the following from this *Championing Diversity* workshop:

Know:
- The definition of diversity.
- Why diversity is important.
- The business imperative.
- The impact of changing demographics.
- Your personal responsibilities.
- Your organizational responsibilities.

Do:
- Self-examination.
- Hands-on activities and exercises.
- Personal commitments.

Feel:
- A deeper commitment to diversity.
- A sense of urgency.
- The value of all people.

2.   **Refer again to page 4 in the guidebook, and ask:**

- Which zone are you in when you continue to do the same thing over and over?

  Walk over to the chart pad and reveal the "Zones" chart page.

- How does it feel when you are in the Comfort Zone?

  Answer: Comfortable!

3.   **State:**

Excellent! Everyone always gets the correct answer to that question.

4.   **Ask:**

- Is it okay to be in the Comfort Zone at all times?

- What's the danger when you stay in the Comfort Zone for too long?

  Answers: We stop learning and growing, we become complacent, we stop asking questions, we become mediocre.

- On our chart, where does that take us?

5.   **Read the second statement on the slide.**

6.   **State:**

To the Discomfort Zone, and sometimes the Panic Zone. So know that...

Read the third statement on the slide.

Some of you may be thinking: There you go; that's my problem. It's not that I don't know what I am doing; it's just that I am growing!

7.   **Share your personal Comfort Zone story.**

8.   **Display Slide 11, "Beyond the Comfort Zone."**

9.   **State:**

Our goal today with this workshop is to not get any of you into the Panic Zone. Too many diversity workshops in the past were designed with "scare tactics."

Walk over to the "Other Categories" chart page.

10.   **Ask:**

Would you agree that today, some of these categories put people into Discomfort or Panic Zones?

11.   **State:**

If you go to either of these zones today, know that you grew a little bit and that your window may have been expanded a little wider. My commitment to you is that I will bring you back to the Comfort Zone. I do ask that you keep an open mind, respect the opinions and feelings of other people in the room, and freely share your thoughts and feelings. You may be challenged; we urge you to rise to the challenge.

LEVELS OF LEARNING

1. **Display Slide 12, "Levels of Learning."**
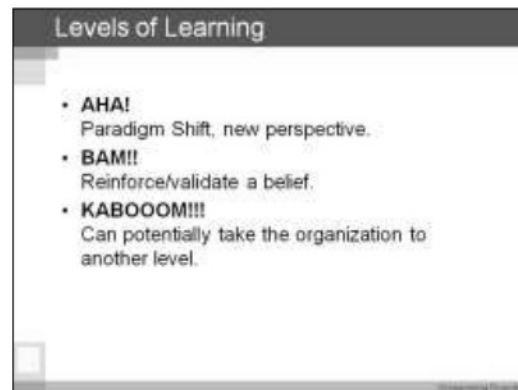
    This slide builds.

2. **State:**

    Now, let's explore three levels of learning we will experience during this workshop. Please write in your guidebook on page 5.

3. **As you build the slide, state:**

    Some of you may experience an AHA!—a new twist or additional information added to your paradigm; a new perspective.

    Some of you may experience a BAM!! That's when something you may have already known to be true gets validated by an exercise or by something someone shares in the workshop. If you do experience a BAM!!, slap your hand on the table.

    Demonstrate and do this every time you experience one of these.

    Some may also experience a KABOOOM!!! That's when a concept takes you to a place to understand the impact if everyone in the organization understood that concept in the same way. "KABOOOM!!!" learning is our goal for this workshop.

Change   Introduction

If you want to feel secure, do what you already know how to do. But if you want to grow, you must go to the cutting edge of your competence—the place where you don't feel secure. Whenever you don't quite know what you are doing, know that you are growing!

Panic Zone
Discomfort Zone
Comfort Zone

Levels of Learning

In the space below, write the definition for each level of learning.

AHA!

_____

BAM!!

_____

KABOOOM!!!

_____

YOUR CHALLENGE   **5**
MINUTES

---

1. **State:**

    To experience this workshop to the fullest, let go of preconceived notions you have about diversity issues. Open your mind, resist judging, and trust the learning process for this workshop.

    Please turn to page 6 in the guidebook.

2. **Display Slide 13, "Your Challenge."**
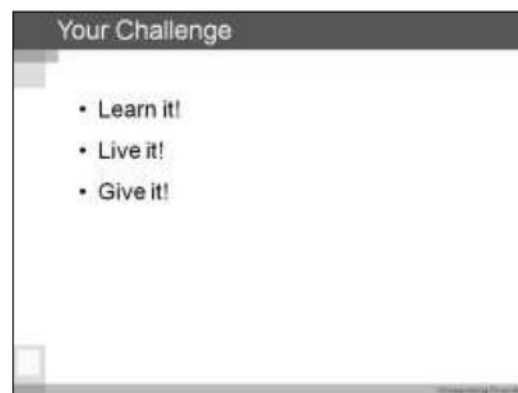
    This slide builds.

3. **Ask:**

    What is your ultimate challenge today?

4. **As you build the slide, state:**

    • **Learn it!** Ask questions of me and of each other. Be curious; challenge. Get involved; participate. Study on your own. Think about what you want in your life.

    • **Live it!** Challenge yourself. Move out of your Comfort Zone—grow and decide to improve. Apply yourself. Commit to apply what you learn in your personal, professional, and community lives. Change from the inside out.

    • **Give it!** Teach it to someone else. Share your valuable learning and experience with others who would benefit from your insight. Be a champion. Strive to master the principles you've learned. Seek opportunities to walk your talk.

Your Challenge

Your challenge for today is to **learn** the material by actively participating, **live** the material by committing to new practices that integrate it into your daily life, and **give** the material by sharing what you learn with others.

LEARN IT

- Ask questions, be curious, challenge.
- Get involved, participate.
- Study on your own.
- Think about what you want in your life.

LIVE IT

- Challenge yourself. Move out of your comfort zone and decide to improve.
- Apply yourself. Commit to apply what you learn in your personal, professional, and community lives.
- Change from the inside out.

GIVE IT

- Teach someone. Share your valuable learning and experience with others who would benefit from your insight.
- Be a champion. Strive to master the principles you've learned.
- Seek opportunities to walk your talk.

5.   **Ask:**

- Which of these three challenges would you say is the most difficult for most people?

  Answer: Live it.

- Why?

6.   **State:**

I can learn it. I can memorize the terms and the concepts. I can teach it and tell other people about it. But if I don't live it and instead just tell and teach people what to do, over time what do I become in their eyes?

Answer: A hypocrite.

7.   **Ask:**

So when I get that email making fun of someone because of hair color or gender, do I choose to delete it or forward it to others?

8.   **State:**

That is the moment of critical choice. That is your ***willingness*** to own it. If you do these things, you will become a transition figure in your organization. A transition figure stops the transmission of negative behavior and replaces it with positive behavior, even if that negative behavior is a norm in the organization.

9.   **Ask:**

- What influence could a whole group of *Championing Diversity* transition figures have on the culture of an organization?

- How do we live it and where do we want to end up?

10.   **State:**

We need some maturity to get there.

| MATURITY CONTINUUM | 5 |
| MINUTES | |

1. **Display Slide 14, "The Maturity Continuum®."**
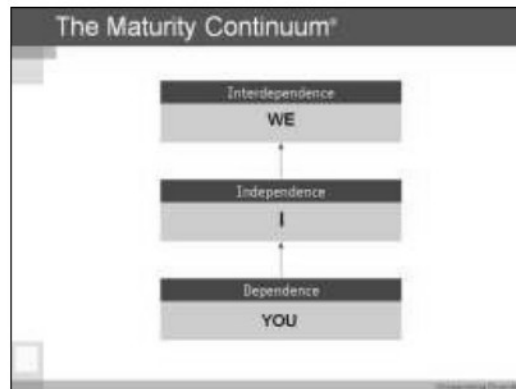
This slide builds.

2. **State:**

Please turn to page 7 and follow along as I explain the Maturity Continuum.

When you are first hired as an employee, there are many things you don't know. You are **dependent** on others. You need someone to show you the ropes and guide you through the process, and you rely on others to help you get your job done. In a way, you are like a newborn baby. This doesn't mean you're never going to "get it"; you just need some guidance.

As you gain experience, you move to the level of **independence**; you can work on your own. You "get it"; you're at the point where you can do it by yourself and you don't feel you need anyone else. It's good that you can do it, but you may need to understand you're part of a team, and the organization relies on all of us working together to get maximum results. The danger of just working "independently" is that people miss out. At this level, if I'm working alone, I'm deciding not to associate with others and, ultimately, I miss out on others' contributions. This is why getting to interdependence maximizes results and output.

At the level of **interdependence,** we all can contribute as full members of the team. When we work at the level of interdependence, the goal is to product results; therefore, our "differences" don't get in the way but instead enhance our relationships and the results we get. Achieving the synergy that comes from interdependence is part of what makes successful organizations. The most effective organizations achieve harmony and growth by encouraging employees to act interdependently.

The Maturity Continuum®   Introduction

Interdependence

Independence

Dependence

When you are first hired, you are **dependent**; you need someone to show you the ropes. As you gain experience, you become **independent**; you can work on your own.

Finally you become **interdependent** and can contribute as a full member of the team. Interdependent teams are key to creating a successful organization.

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3.   **Ask:**

- How do dependent people approach work?

  Answer: Dependent people have the attitude of "Just tell me what to do and I will do it."

- How much creativity or innovation do you get out of a person with this attitude?

  Answer: None or very little.

4.   **State:**

The next stage of maturity is independence.

5.   **Ask:**

What are the advantages and disadvantages of this stage?

Answers:

- *Advantages: People want to do things their way, but mostly they want to be trusted to figure things out. There are times when being independent is the most efficient way to work.*

- *Disadvantages: Independent thinkers tend to build walls around what they have control over. They are not concerned about how they affect others.*

6.   **State:**

When people progress toward interdependence, they realize they need others in order for them to survive and accomplish goals. Teams reach goals when they trust each other, work together, and take advantage of everyone's different skills, knowledge, and experience. They realize they can achieve more together than they can alone. If you really want to achieve at a high level, you have to cooperate and collaborate—you have to be interdependent.

7.   **Transition to the exercise by stating:**

Let's get you up and moving—you have been sitting too long. Let's do an exercise to demonstrate moving from dependence through independence and, ultimately, to interdependence.

55

1. **Transition by asking:**

    So how do we value each other?

2. **State:**

    We will start the journey after the break.

    Be back in your seats in 15 minutes. Enjoy.

BREAK

What Is Diversity?

DEFINING DIVERSITY   **15**
MINUTES

1.   **Display Slide 16, "What Is Diversity?"**
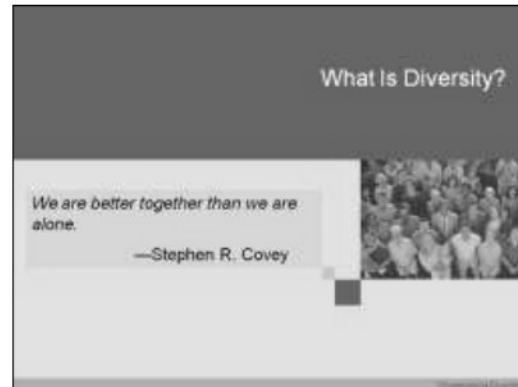
Have this slide showing on the screen when participants come back from break.

EXERCISE: DEFINITIONS

1.   **Display Slide 17, "Exercise."**
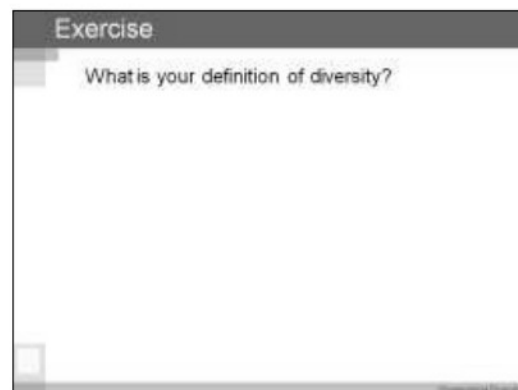
2.   **State:**

Please turn to page 10 in the guidebook. Take a minute or two to write down your definition of diversity.

Allow 1 to 2 minutes.

Now take a few minutes and share your definition with the other people in your table group.

Allow 5 minutes.

What Is Diversity?

Diversity Principle

What is your definition of diversity?

_____

_____

_____

_____

Diversity Principle

Every person is unique and has a unique contribution to make.

Notes

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

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3. **Ask:**

    - How many of you had the correct definition of diversity? What did sharing your definition allow you to see or understand about diversity?

      Possible answers: There are many definitions, no one definition is correct or wrong, some definitions are short and some are long.

    - Because there are so many differences in this world—and even in this room, as you've probably noticed—how should diversity be defined? Is there truly one definition of diversity?

4. **Display Slide 18, "Diversity Definitions."**
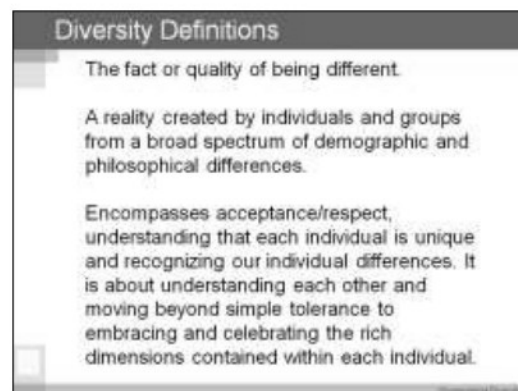
    Reveal the definitions one at a time as you explain their history.

5. **State:**

    Back in the 1970s, diversity was defined as the fact or quality of being different.

6. **Ask:**

    Short and to the point, correct? Why do you think, back then, that was the definition of diversity?

    Answers: The media didn't pay much attention to diversity at the time, diversity was not a big issue in the workplace, it wasn't "in our faces."

7. **Reveal the next definition and state:**

    Ten years later, diversity was defined as a reality created by individuals and groups from a broad spectrum of demographic and philosophical differences.

8.   Ask:

- What happened to the definition in only 10 years?

  Answer: It changed.

- What was added?

  Answer: Whom it's about.

- But is the first definition still correct?

  Answer: Yes.

9.   State:

In the 1990s, diversity was defined in this way:

Encompasses acceptance/respect, understanding that each individual is unique and recognizing our individual differences. It is about understanding each other and moving beyond simple tolerance to embracing and celebrating the rich dimensions contained within each individual.

Whew!

10.   Ask:

- What happened to the definition by the 1990s?

  Answer: It became longer and more complex.

- What was added?

  Answer: Action ("understanding," "moving," "embracing, "celebrating").

- But is the first definition still correct?

  Yes.

- What is the danger of a changing definition?

  Answers: Confusion, no buy-in, problems with understanding and staying current.

- Where do you think the definition will be 5 years from today? 10 years from today?

  Solicit ideas.

- When we talk about diversity, are we just talking about race, or might other categories of people fall under the category of diverse?

  Solicit answers.

PRINCIPLES GOVERN   **15 MINUTES**

1. **State:**

   As we discussed this morning, diversity goes beyond just race and gender.

   Walk over to the "Other Categories" chart.

   That's why, instead of getting caught up in having to find the current definition, we decided to use a diversity principle instead. This principle never changes and always produces the same results.

   Every person is unique.

2. **Ask:**

   Would you agree with that?

3. **State:**

   It doesn't matter where you are or what group you are in at the time— everyone is unique.

4. **Ask:**

   So when you bring unique people together, what does each person bring with him or her?

   Answer: Unique contributions.

5. **State:**

   And those unique people and contributions could come from these categories.

   Refer again to the "Other Categories" chart.

   Now, let's define what we mean by "principle."

6. **Refer again to page 10 in the guidebook.**

7.   **Display Slide 19, "Diversity Principle."**
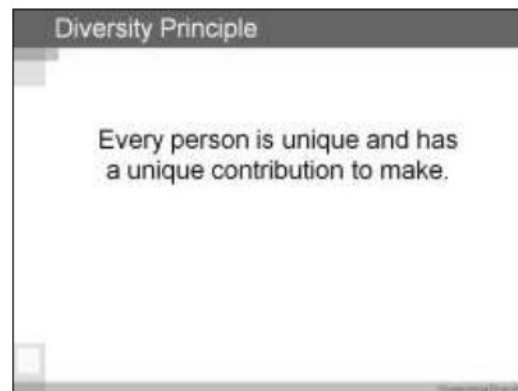
Read the definition on the slide and on page 10.

8.   **Refer participants to page 11 in the guidebook.**

9.   **Display Slide 20, "Principles Govern."**

Keep this explanation simple. Read the entire slide very quickly. Ask participants to bear with you as you throw many words at them.

10.   **State:**

Whew, that's a whole lot of words. Let's think about it this way.

11.   **Ask:**

What's the most common natural law—Newton's law of gravity—about?

Answer: Gravity basically means that "what goes up must come down."

12.   **State:**

Gravity is universal and timeless. It produces predictable results external to ourselves. Let me demonstrate, then, what we mean by a principle.

Principles Govern

What Is Diversity?

Principles Defined

Principles are natural laws or fundamental truths. When we understand these principles, they empower and enable us.

Principles:

- Are universal and timeless.
- Produce predictable results.
- Are external to ourselves.
- Operate with or without our understanding and acceptance.
- Are self-evident and enabling when understood.

We choose our *behaviors*. The consequences of our behaviors are governed by *principles*.

Therefore, we choose the_____ at the same time we choose our _____.

Notes

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11

69

Gravity/Hot-Coffee Demonstration

Take a cup of coffee and hold it in front of the class (holding your other hand underneath). Be careful!

1. **Ask:**

What will happen every single time if I remove my hand from this cup of steaming-hot coffee?

Answer: It will fall.

2. **State:**

Now, what happens when the cup hits the floor or carpet may be different, but the fact that it will always fall is true—correct? Gravity kicks in every time.

3. **Ask:**

*   *[Looking at a table]* If I were to go to your table and remove my hand from this cup of steaming-hot coffee, what would you do?

    Answers: Move away, push back, try to catch it, push you away.

*   Why would you do that?

    Answers: I don't want to get burned, I know what will happen.

*   And where did you learn all that?

4. **State:**

You learned all that through life and what has been placed on your window—either through experience or because you learned it and have been carrying it with you. Each of you would respond somewhat similarly, but still differently. Correct?

Stay with me.

5.   **Display Slide 21, "Choice."**
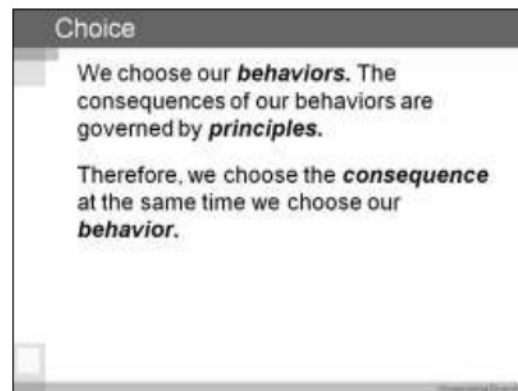
This slide builds.

6.   **State:**

We choose our behaviors.

Pause to emphasize this point.

The consequences of our behaviors are governed by principles.

Pause again.

Build the slide and emphasize:

Therefore *[pause],* we choose the **consequence** at the same time we choose our **behavior.**

Repeat this sentence a couple of times. Have participants fill in the words in the middle of page 11.

Go back to the table where you gave the coffee example.

7.   **Ask:**

- So at the same time you chose to move back when I removed my hand from this cup, what possible consequences did you choose **not** to accept?

  Answers: Getting burned, getting clothes stained, having to smell like coffee.

- And how long did it take you to decide to move back?

  Answer: A split second.

8.   **State:**

From here *[gesture where you would have held the cup]* to here *[where it would have fallen].* No time at all.

9.   **Ask:**

And would you agree that, in real life, sometimes that's about how long we have to make decisions around diversity situations that could impact a person forever?

10.   **State:**

Let's take a few more looks at choice.

11.   **Ask:**

Let's say an adult gets into a car and chooses not to put a child in a seatbelt—and do some adults really choose to do that?

At the same time the adult chooses **not** to use a seatbelt for the child, what **possible** consequences does he or she choose to accept?

Answers: A ticket, a distraction, possible injury to or death of the child.

12.   **State:**

I don't think that is what anyone wants. But just that easily, the consequences can become reality.

13.   **Ask:**

When does an adult "get" the importance of that seatbelt for the child?

Answer: Sometimes when it is too late.

14.   **State:**

Now, let's talk about choice in a work situation.

15.   **Ask:**

When an associate, an employee, or a partner chooses to say something derogatory or malicious about another employee who is Hispanic or female or gay, at exactly the same moment those words come out of that person's mouth, what possible consequences does that person accept or own?

Answers: Reprimand, termination, retaliation, team conflict, breach of trust.

16. State:

In the past, that person may have chosen to say something derogatory and gotten away with it, but it should not happen anymore. It's time to open your window.

We have words that live in the back of our head—words from the past. But there is a big gap between what is in the back of our head and what is in our heart. Sometimes, though, our mouth gets in the way, and those words come out. We can always apologize, but once we have been heard, it is often too late. Those words are out in the open, and they come out in that split second from here *[coffee cup at top]* to here *[coffee cup at the bottom]*.

THE CORNERSTONES OF DIVERSITY   **25 MINUTES**

The Appendix provides detailed information on the Cornerstones of Diversity.

1.   **State:**

     We need to find a way to keep the diversity principle in mind.

2.   **Ask:**

     How do we do this? How do we continue to support and remember the diversity principle—that everyone is unique with a unique contribution?

3.   **State:**

     With the Cornerstones of Diversity. These statements are the cornerstones of our philosophy about diversity.

4.   **Ask:**

     - Where do we see cornerstones?

       Answer: At the foundation of a building.

     - What happens if one of those cornerstones is impacted or compromised?

       Answers: The building's integrity is weakened, the building's stability is threatened.

5.   **State:**

     That's exactly how we feel about these Cornerstones of Diversity. Compromising any one of them could negatively impact the stability of the organization, of teams, of people, of systems, and of processes.

     Follow along on pages 12 and 13 as I give you a brief overview of the Cornerstones of Diversity. As we talk about each cornerstone, please underline the key words on those pages.

What Is Diversity?

The Cornerstones of Diversity

1. Diversity is about *inclusion and engagement*—leaving no one behind.

2. Synergy can be achieved only when everyone is *working together*.

3. Every team member deserves a base level of *dignity and respect*.

4. Everyone adds value and must have an *equal opportunity* to contribute and achieve.

5. High-performance teams *eliminate the effects of prejudice*.

The Cornerstones of Diversity

What Is Diversity?

6. Understanding diversity must occur at *all levels* of the organization.

7. Diversity solutions must be *situation-specific*.

8. Diversity is *everyone's responsibility*.

9. You don't have to be *one of to stand with*.

Display Slide 22, "The Cornerstones of Diversity."

Read Point 1 on the slide.

6. State:

Diversity is about ***inclusion and engagement***—leaving no one behind.

For example, let's say I am the manager of this table group. I invite all of you to lunch, but I choose not to talk to **you** the entire time.

Point to a participant when you say "you."

Don't say you didn't get invited, because you are here! I've included you, but I have not engaged you.

7.   Ask:

But what happens when they get here?

Answer: We do not engage them.

8.   State:

This is a huge drain on the organization. It definitely impacts retention.

Read Point 2 on the slide.

Synergy can be achieved only when everyone is ***working together***.

We want to bring invisible people to visibility. We need their uniqueness to contribute to the organization's purpose and mission every day.

Read Point 3 on the slide.

Every team member deserves a base level of **dignity and respect.**

We emphasize a "base level" of dignity and respect. I was challenged once by someone who said, "I don't give anyone respect—they have to earn it!"

My response was, "But I shouldn't have to do anything for just being human!" I deserve a base level of dignity and respect just for being human. If I then have to interact or work with you, I may have to work a little harder to gain your trust; but otherwise I, too, am human.

Read Point 4 on the slide.

Everyone adds value and must have an ***equal opportunity*** to contribute and achieve.

We have to move from pigeonholing people into positions. We might be thinking, "Just because you are *this*—an admin, team advisor, finance officer—you will always be only *that*." Or we might have a successful manager who is afraid to promote a team member because he or she fears no longer being successful without that person on the team.

Read Point 5 on the slide.

High-performance teams ***eliminate*** the effects of ***prejudice.***

Have participants underline the words "the effects" in Point 5 on page 12 in the guidebook.

9. **Ask:**

Can we really eliminate all prejudices?

10. **State:**

Of course not. But working together, we can eliminate the effects of prejudice if our goal is to be a high-performing team.

11. Display Slide 23, "The Cornerstones of Diversity (cont.)."
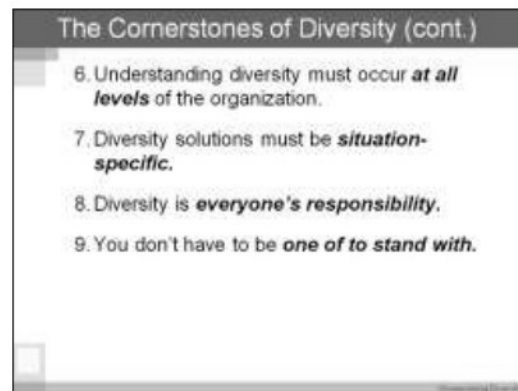
12. Ask:

If high performance is the goal, what then should *not* come into play?

Answer: Categories.

Read Point 6 on the slide.

13. State:

Understanding diversity must occur *at all levels* of the organization.

14. Ask:

But who often gets diversity training?

Answer: sometimes only the leaders are trained, not the employees.

15. State:

We expect everyone to know these things the same way, so everyone needs the training.

Read Point 7 on the slide.

Diversity solutions must be *situation-specific*.

One size does not fit all. When the rules came out for the Americans With Disabilities Act of 1990, many companies did not know how to handle them. Building ramps—that was easy to do. One person was legally blind and asked for reasonable accommodation at work. He was told, "Just use the ramp!" The company had one solution and expected it to be everyone's solution.

Read Point 8 on the slide.

Diversity is ***everyone's responsibility***.

16. Ask:

In many companies, who is often tasked to take care of any diversity issues?

Answer: Human Resources.

17. State:

The problem is that Human Resources is not around 24/7.

Here are a few examples of when people chose not to live up to their responsibility:

- Matthew Shepard, a student at the University of Wyoming in 1998. He was a gay man kidnapped by two other men, robbed, tortured, tied to a fence in a remote area, and left to die. Initially, no one saw it. Initially, no one took responsibility. He died five days after he was discovered. He was someone's son.

- In 1998, James Byrd of Houston, Texas, an African-American man beaten by three men, stripped naked, and dragged alive behind a pickup truck for 3 miles. His right arm and head were severed when his body hit a culvert, killing him. Initially, no one saw it. Initially, no one took responsibility. He was someone's friend, someone's father.

18. Ask:

Do you really think no one saw any of this?

19. State:

But initially, no one took responsibility to stop it or to report it.

In 2008, a woman in New York City was viciously attacked and killed

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Read Point 9 on the slide.

You don't have to be *one of to stand with.*

20.   Ask:

What does that sentence mean to you?

21.   State:

I don't have to be female to march in an event promoting a cure for breast cancer. I don't have to be gay or lesbian to support a friend or family member who is. I don't have to be a parent to support a rally for juvenile diabetes. I don't have to be visually impaired to support my brother who is.

Share your story for either Cornerstone 1 or 9.

CORNERSTONE-DISCUSSION EXERCISE

1.   State:

Now we want to hear from you.

2.   Ask:

If you had to define these cornerstones, what would you want fellow employees or associates to know about them?

3.   Assign one or two cornerstones to each table.

4.   Display Slide 24, "The Cornerstones of Diversity Exercise."

The Cornerstones of Diversity Exercise

What would you want employees to know about the cornerstones?

Give an example of your cornerstones.
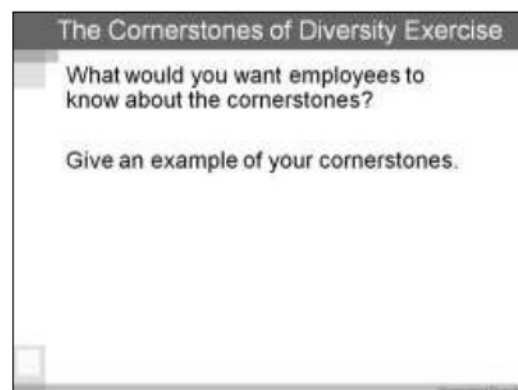
5.   **State:**

In your table groups, I would like you to come up with how you would explain your assigned cornerstone(s) to someone else. I also want you to come up with an example of the cornerstone(s). You have 6 minutes.

After 6 minutes, have each table group share their definitions and examples.

6.   **Ask:**

- Any questions?

- How will you remember these cornerstones once you leave here?

7.   **State:**

Each of us learns differently. Some of us learn best by reading; others learn best by hearing or seeing. Still others learn by doing—by using gestures. They're called kinesthetic learners.

I am going to show you some symbols representing each of the cornerstones. I will then challenge you to learn them and practice them with your table groups.

See the "'Cornerstones of Diversity' Kinesthetic Symbols" section in the Appendix.

8.   **Display Slide 25, "The Cornerstones of Diversity."**

Keep this slide on the screen for most of this exercise.

Allow participants to practice for about 3 minutes.

9.   **Ask:**

How did you do?

10. **State:**

Excellent. What a way to embrace the Cornerstones of Diversity and make them memorable! These are also referred to as the unspoken language of the Cornerstones of Diversity.

Share the "Vice President: 'I Don't Play Games'" story in the Appendix.

Why Is Diversity Important?

THE FIVE REASONS   **30 MINUTES**

1.   **Display Slide 26, "Why Is Diversity Important?"**

Review the quote on the slide.

2.   **State:**

Very quickly, I will review the five business reasons why this training is so important for organizations. Please turn to page 16 and write down the reasons as we go through the material.

REASON 1: THE RIGHT THING TO DO

1.   **Display Slide 27, "The Five Business Reasons (1)."**

Why Is Diversity Important?

The Five Business Reasons

Reason 1

_____

_____

_____

Reason 2

_____

_____

_____

Reason 3

_____

_____

_____

Reason 4

_____

_____

_____

Reason 5

_____

_____

_____

2.   **State:**

It's the right thing to do—period. It may not be the easiest thing to do, but if it is the "right thing to do," it should not matter how hard or easy it is. Respecting diversity is simply the right thing to do. Organizations often implement diversity initiatives because they care about their employees and want to create an environment where all employees are treated with respect.

Organizational leaders can foster an environment of trust for all employees, regardless of race, gender, or lifestyle. This type of environment is the organization's way of showing appreciation and valuing employees.

While the other four reasons are compelling, the first is the most important reason.

3.   **Display Slide 28, "The Five Business Reasons (2)."**

The Five Business Reasons

1. The Right Thing to Do
2. The Law of the Land/Organizational Policy

4.   **State:**

The law says we cannot discriminate, treat with bias, or harass members of our workforce or our customer base. Many organizations today have policies on diversity, provide diversity training, and talk about diversity when they hire and promote. The rest of the world has made laws too.

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REASON 2: THE LAW OF THE LAND

1. **Refer participants to page 17 in the guidebook.**

2. **Display Slides 29 and 30, "It's the Law of the Land."**

    > ### It's the Law of the Land
    >
    > 1. **European Union Directive (2000)** — "The Racial Equality Directive prohibits discrimination on the grounds of racial or ethnic origin. The Employment Equality Directive prohibits discrimination on the grounds of religious belief, disability, age, or sexual orientation."
    >
    > 2. **United Nations Convention on the Elimination of Racial Discrimination (1969)** — "Member States condemn racial discrimination and undertake to pursue by all appropriate means and without delay a policy of eliminating racial discrimination in all its forms and promoting understanding among all races."
    >
    > 3. **Great Britain: Employment Equality Regulations (2006)** — "It is unlawful for an employer, in relation to a person whom he employs at an establishment in Great Britain, to discriminate against that person in the terms of employment and opportunities which he affords him."

    > ### It's the Law of the Land
    >
    > 4. **The Equal Pay Act of 1963 (EPA)** — "It protects men and women who perform substantially equal work in the same establishment from sex-based wage discrimination."
    >
    > 5. **United States: Civil Rights Act (1964)** — "It is unlawful to discriminate in employment practices based on race, color, religion, sex, or national origin."
    >
    > 6. **The Age Discrimination in Employment Act of 1967 (ADEA)** — "It protects individuals who are 40 years of age or older."
    >
    > 7. **Title I and Title V of the American With Disabilities Act of 1990 (ADA)** — "It prohibits employment discrimination against qualified individuals with disabilities in the private sector, and in state and local government."

    Quickly read the points on the slides.

3. **Ask:**

    So, what does this tell us? Do laws really matter?

4. **State:**

    To a point, they do—but our behaviors truly make the difference one way or the other. Even some of the largest, most powerful companies choose not to follow good practices. Therefore, they have to suffer the consequences.

    Many major organizations are involved in litigation over the treatment, hiring, and promotion of employees. Lawsuits negatively affect morale, productivity, and the organization's mission.

Global and U.S. Laws

Global Laws
- European Union Directive (2000), including the Racial Equality Directive and the Employment Equality Directive
- United Nations Convention on the Elimination of Racial Discrimination (1969)
- Great Britain: Employment Equality Regulations (2006)

U.S. Laws
- The Equal Pay Act of 1963 (EPA)
- The Civil Rights Act of 1964
- The Age Discrimination in Employment Act of 1967 (ADEA)
- The Rehabilitation Act of 1973
- Title I and Title V of the Americans with Disabilities Act of 1990 (ADA)
- The Civil Rights Act of 1991
- The Genetic Information Nondiscrimination Act of 2008

The Equal Employment Opportunity Commission (EEOC) enforces all U.S. acts. The EEOC filed more charges of discrimination in 2010 than in any year in the past 45 years.

Organizational Policy

Most organizations are bound not only by these Federal laws, but also by organizational policies that often expand upon the acts listed above. For example, as of March 2011, 87 percent of Fortune 500 companies prohibited employment discrimination based on sexual orientation.

17

5.   **Ask:**

Remember what we mentioned about consequences being based on principles?

6.   **State:**

Breaking the law always has consequences, and then someone has to pay for them.

7.   **State:**

Most organizations are bound not only by these laws, but also by organizational policies that often expand upon the federal acts. For example, as of March 2011, 87 percent of Fortune 500 companies prohibited employment discrimination based on sexual orientation.

8.   **Display Slides 33 and 34, "2010 Statistics."**

> **2010 Statistics**
>
> The Equal Employment Opportunity Commission (EEOC) filed more charges of discrimination in 2010 than in any year in the past 45 years.
>
> • Charges alleging violations of the Disabilities Act increased 17% over 2009.
>
> • Charges alleging racial discrimination increased 6.9%.
>
> • Charges alleging employer retaliation increased 7.9%.
>
> • Charges alleging religious discrimination increased 1.9%.
>
> • Charges alleging discrimination over national origin increased 1.5%.

> **2010 Statistics**
>
> EEOC filed 99,922 new charges in 2010 and succeeded in getting charges against companies totaling $319 million. This does not include the costs of attorneys and court fees—and the loss of public goodwill.

Review the information on the slides.

REASON 3: CHANGING DEMOGRAPHICS

1.   **Display Slide 35, "The Five Business Reasons (3)."**

> **The Five Business Reasons**
>
> 1. The Right Thing to Do
> 2. The Law of the Land
> 3. Changing Demographics

2.   **State:**

Demographics are changing everywhere:

- Our customer base

- The customers of our customers

- Suppliers

- Home and office communities

- Families

- The talent pool

If demographics are changing everywhere, the best proactive companies are going to do something about them or lose out. To grow and to sustain growth, our organization has to win two wars.

3.   **Display Slide 36, "Winning."**

4.   **Ask:**

How do we win?

5.   **State:**

Look at what's happening in today's world. Just to survive in today's global market, let alone succeed, companies must compete at a higher level than ever before. Organizations need to perform better, faster, more efficiently, and with greater profitability. Leaders must be visionaries who can predict global trends and meet them head on while maintaining steady profits.

As Baby Boomers enter retirement, organizations will also need to win the war on human capital—the talent war. Every organization today is in a battle for talent, and companies that attract the best people in the greatest numbers will win—always.

6. **Display Slide 37, "U.S. Population Statistics—2010."**
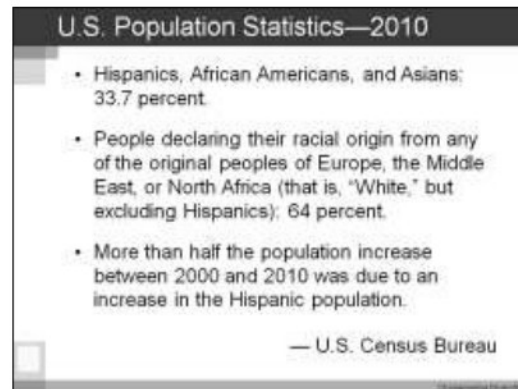
7. **State:**

Look at page 18 in the guidebook. Hispanics/Latinos, African Americans/Blacks, and Asians made up 33.7 percent of the U.S. population in 2010, and more than half the population increase in the United States between 2000 and 2010 was due to an increase in the Hispanic population. Furthermore, foreign-born people made up 15.5 percent of the U.S. workforce in 2009.

This means companies must have policies in place to attract these new workers if they want to win the talent war and, thus, the profit war. As organizations, we have to be prepared for these realities.

8. **Ask:**

   • What does nontraditional mean?

     Answers: single moms, single dads, blended families, blended races, same-sex parents, grandparents raising grandchildren, etc.

   • So, what does that mean to us in understanding this window's reality?

9. **State:**

Yes, demographics are changing, and the changes will affect the way we recruit and retain talent forever.

Why Is Diversity
Important?

Changing Demographics

U.S. Population Statistics

Hispanics, African-Americans, and Asians made
up 33.7 percent of the U.S. population in 2010,
according to the U.S. Census Bureau:

- 50 million Hispanics
- 39 million African-Americans
- 15 million Asians
- 23 million Native Americans, Hawaiians, and
  people of other races

People declaring their racial origin to be from any
of the original peoples of Europe, the Middle East,
or North Africa (that is, "White," but excluding
Hispanics) constitute 64 percent of the U.S.
population.

More than half the population increase in the U.S.
between 2000 and 2010 was due to an increase in
the Hispanic population.

U.S. Workforce Statistics

According to the U.S. Bureau of Labor Statistics,
foreign-born people made up 15.5 percent of the
U.S. workforce in 2009. Of that percentage:

- 50.1 percent were Hispanic.
- 22.3 percent were Asian.

18　　° FranklinCovey. All rights reserved.

10.   **Display Slide 38, "Discrimination Facts."**

11.   **Review the discrimination facts on the slide and on page 19 in the guidebook.**

12.   **Review the statistics on page 20 in the guidebook.**

13.   **Display Slide 39, "Cultural Shifts in Society."**

Read the statement on the slide.

Discrimination Facts

Employers may not refuse to hire or may not fire a person based on discriminatory practices related to:

- Compensation.
- Term of employment.
- Conditions or privileges of employment.
- Race.
- Color.
- Religion or creed.
- Sex.
- National origin.
- Age.
- Genetic information.
- Disability.

Notes

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The Business Case

RACIAL DISCRIMINATION LAWSUITS			
Company	Year	Number of Plaintiffs	Settlement
Beverage	2000	2,200	$192.5 million
Oil	1996	1,400	$176 million
Insurance	2002	1.8 million (policy holders)	$160 million
Health	2006	3,000	$80 million
Clothing	2003	17	$40 million
Transportation	2000	800	$16 million
Auto Manufacturing	2006	3,400	$11 million
Restaurant	2004	42	$8.7 million
Oil	2004	200	$5.5 million
SEX-DISCRIMINATION LAWSUITS			
Retail	1997	25,000	$104 million
Retail	2002	5,000	$47 million
Consumer Products	2003	486	$10 million
Aircraft	2004	29,000	$72.5 million
Financial Services	2004	340	$54 million
GRAND TOTALS			$977.2 million

(DiversityInc Magazine, Special Issue, 2006)

REASON 4: SAFE AND PRODUCTIVE ENVIRONMENT

1. **Display Slide 40, "The Five Business Reasons (4)."**

   The Five Business Reasons
   1. The Right Thing to Do
   2. The Law of the Land
   3. Changing Demographics
   4. Safe and Productive Environment
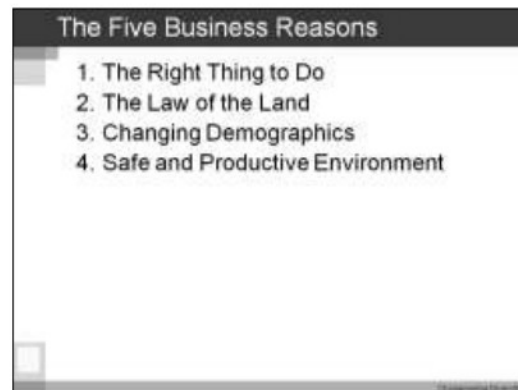
2. **Have participants write Reason 4 on page 16 in the guidebook.**

3. **State:**

   The fourth reason sounds a little familiar: create a safe and productive environment.

4. **Ask:**

   What does this really mean?

5. **Display Slide 41, "Safe and Productive Environment."**

   Safe and Productive Environment
   Employees do their best work when they:
   • Are treated fairly.
   • Are not harassed, excluded, or ignored.
   • Have an equal opportunity to succeed.
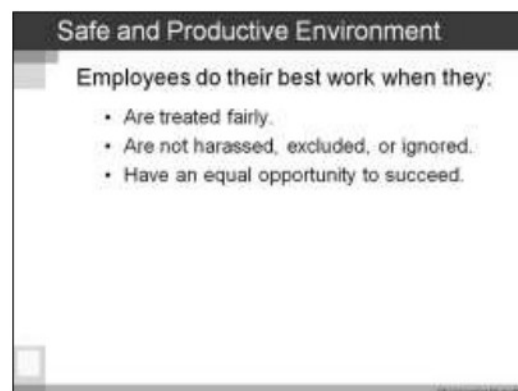
6. **State:**

   Diversity champions look at the culture of their organization to ensure that it is fair and safe for all people. If these conditions are not met, not only are companies breaking the law, but they are also making it impossible for all their employees to do their best work every day.

7.   **Display Slide 42, "Diversity Is About…."**

Read the slide and add: "…100 percent of the time."

REASON 5: BUSINESS CASE

1.   **Display Slide 43, "The Five Business Reasons (5)."**

2.   **Have participants write Reason 5 on page 16 in the guidebook.**

3.   **State:**

And the fifth reason why diversity is important in organizations is called the "business case."

Present the business case for the organization, or use the questions on the next slide.

4. **Display Slide 44, "Your Business Case."**
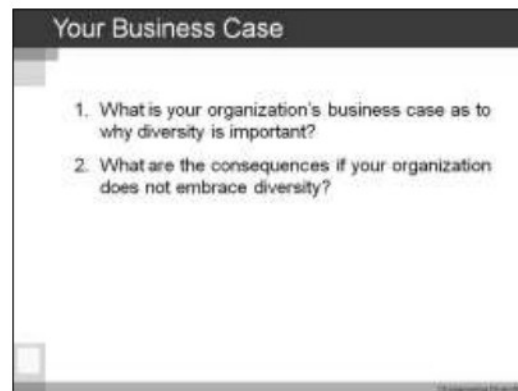
Have participants answer the questions on the slide.

5. **State:**

Let's talk about the business case for diversity. Leaders ask these questions about diversity:

-   How does this initiative impact the bottom line?

-   What markets should we be targeting?

-   How does this initiative impact the organization's mission?

-   How does the organization get its best return on investment?

Embracing diversity impacts the bottom line in terms of:

-   Retention.

-   Employee contributions.

-   Employee satisfaction with the organization.

-   The quality and variety of the ideas available to the organization.

Embracing diversity also results in reducing or avoiding lawsuits. From 1996 to 2005, companies in a variety of industries paid out over $977 million in discrimination lawsuits. That's real money that affects the bottom line of an organization.

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OPTIONAL CASE STUDY: RICH GILLIGAN

1. **Display Slides 45 and 46, "Rich Gilligan, 1998."**

   > Rich Gilligan, 1998
   >
   > - When Rich Gilligan took over a troubled Mitsubishi automotive plant, it was one of the most automated and least productive plants in the country.
   > - Mitsubishi had paid $34 million to settle a sexual-harassment lawsuit and had also paid a multimillion-dollar lawsuit to African-American and Hispanic workers for discrimination.

   > Rich Gilligan, 1998 (cont.)
   >
   > Rich Gilligan took these steps:
   >
   > 1. Instituted a zero-tolerance policy that resulted in 8 firings, 14 suspensions, and 30 disciplinary actions over three years.
   > 2. Rewrote the plant's mission statement to include respect for others first and productivity second.
   > 3. Provided training for all employees in racial and sexual discrimination and harassment, and required a refresher course every two years.
   >
   > The result: By 2001, the plant ranked third in productivity for U.S. plants.

   Quickly review the case study and touch on the key points of this sexual-harassment lawsuit.

2. **Ask:**

   How would American companies benefit if every leader took diversity as seriously as Rich Gilligan did?

   Answers: They would benefit from productivity gains, profit gains, and reduced litigation.

3. **State:**

   Championing diversity is about winning at business.

   LUNCH BREAK

CHANGE MODEL   **5**
MINUTES

1. **Display Slide 52, "The Change Model."**
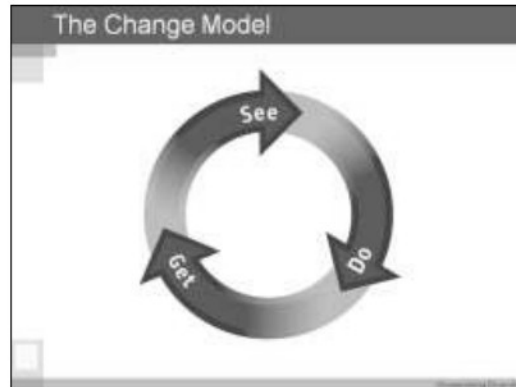
2. **State:**

    This model is often referred to as the Change Model or the See-Do-Get Model. It demonstrates how:

    - Our belief systems—in other words, our windows; our view of the world—affect how we **See** the world and our perceptions of it.

    - These belief systems affect what and how we **Do** things.

    - Our behaviors and actions impact and affect our results—what we **Get**, either good or bad.

3. **Refer to page 24 in the guidebook.**

4. **State:**

    Add these pieces of information to the model on page 24:

    - **See** is our view of the world.

    - **Do** is our actions and behaviors.

    - **Get** is the results of our actions and behaviors, good and bad.

    Because we see the world a certain way, we act in ways that influence what we get.

The Effects of Stereotypes

The Change Model

Notes

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5.   Ask:

- Whenever we try to change anything in our lives, which part of the model do you think we try to impact first?

  Answer: Do—the easy place to start.

- However, which part of the model should we really be focusing on the most to get truer, longer-lasting results?

  Answer: See—the window.

- Could that be difficult for people to do? Why?

  Allow time for participants to answer.

- When you realize something you may have been carrying with you in your window is wrong, could that be impactful or even devastating for some people?

6.   State:

That moment of awareness—of understanding that your window needs to change—is called experiencing a "Paradigm Shift." Meaningful, long-lasting change starts with our belief system—the way we see things. Many times we have to take control of what is in our window of life and what stays there.

Championing Diversity

1. **Display Slide 53, "Championing Diversity."**
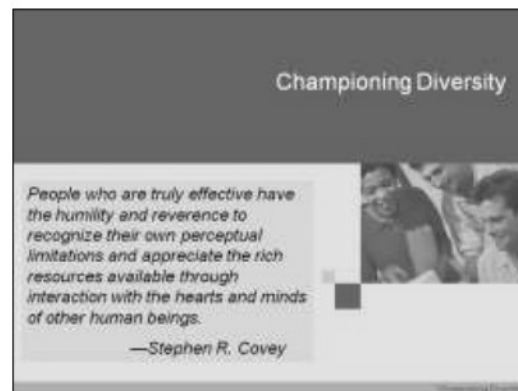
2. **State:**

    We have been on quite a journey today. We laid the foundation with our diversity principle: "Every person is unique with a unique contribution to make."

    We discussed the cornerstones.

    Review the cornerstones using the kinesthetic symbols participants learned earlier.

3. **Ask:**

    Where are we now?

4. **State:**

    It's time to take this learning inside to a personal level that involves personal responsibility and personal commitment to action.

VALUING DIFFERENCES MODEL   **20**
MINUTES

1. **Display Slide 54, "Valuing Differences Model—Personal."**
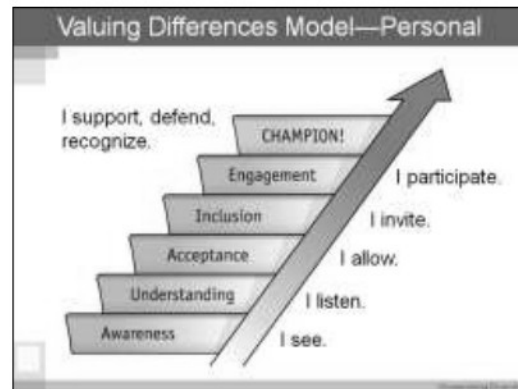
   Show the slide, but do not build it yet.

2. **State:**

   Championing diversity itself is a journey—a personal one. You see this
   reflected in the Valuing Differences model on page 26 in the guidebook.
   I'm going to give you some more words to add to your guidebook to
   explain the model.

   It starts inside of you with the foundation of awareness—I see; then
   understanding—I listen. It continues with acceptance—I allow; inclusion—I
   invite; and engagement—I participate.

   As the journey progresses, you move from a focus within yourself to a
   focus on others until you are truly a diversity champion—I support,
   defend, recognize. That, truly, is everyone's goal. But even if you do get
   to this level, you still have to continue learning and studying to stay
   there.

   Now let's make this personal. Look at the model on page 26. Please place
   a check mark where you see yourself on this model.

3. **Ask:**

   Where are you on this journey?

Championing Diversity

Valuing Differences Model— Personal

CHAMPION!

Engagement

Inclusion

Acceptance

Understanding

Awareness

What are some things you could do to move to the next level?

_____

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4.　　**State:**

Be honest with yourself.

Now, let's look at personal accountability within this model. Write down one or two things you will do to move to the next level.

Allow 2 to 3 minutes for writing.

5.　　**Ask:**

- For example, if you are at "understanding," what will you do to move yourself to the level of "acceptance"?

- Even if you see yourself as a champion, is there something you can do to stay there?

6.　　**State:**

The next step is personal accountability. I will pair you up for this exercise.

EXERCISE: PERSONAL ACCOUNTABILITY

1.　　**State:**

First, I want you to share with each other where you place yourself on the model on page 26 and why. Then share the one or two action items you have written down that will help you move to the next level.

Share the following story as an example of an action item.

One time while teaching this workshop, a participant became very quiet at this point. After the workshop, I asked him if everything was okay. He shared with me that he had experienced a Paradigm Shift around a very difficult decision. He said he just realized he had to confront an issue with his lifelong best friend. His best friend had been telling derogatory jokes in front of the participant's children, and after his friend would leave, the participant had to explain to his children that those jokes were not okay.

He said, "I have not faced the situation, and every time I let him tell a joke like that, I am validating that it is okay when I choose not to say anything. Even worse, I am letting him put that on my young children's windows as being 'okay.'"

　　　　　125

The participant called me later to tell me he had spoken with his friend over dinner one day and explained that he no longer wanted those types of jokes in his house, in front of his children. His friend became angry and left the restaurant. They have not spoken since.

"As difficult as that was to do, I realized I had to protect my children at that point," he said. "What if I didn't say anything and didn't address the derogatory jokes, and my children took those jokes to school or to their play center?"

Deliberately pair people who are not sitting at the same table. Give them 5 to 10 minutes to share with each other.

2. **State:**

Now you may think, "But I am only one of many—hundreds, thousands. How much of an impact can I make?"

VIDEO: *TRIM TAB*   **10**
MINUTES

1. **Display Slide 55, "Video:** *Trim Tab.***"**

2. **Show the video.**

3. **Debrief the video by stating:**

    This video shows how one person can make a difference in the lives of many.

DIVERSITY- CHAMPION COMMITMENTS
MINUTES
5

1. Display Slide 56, "Diversity-Champion Commitments."

2. Refer participants to page 27 in the guidebook.

3. State:

Diversity champions are willing to be open to the contributions of everyone. They believe that working with people different from themselves allows them to create a better way, a higher way. They value and champion differences and practice creative cooperation. This process is called synergy.

Diversity champions:

- Are willing to search for a solution that is better.

- Respect other people's viewpoints.

- Create new ideas.

4. Read or have a volunteer read the diversity-champion commitments on the slide and on page 27.

5. State:

We've taken an individual look at the Valuing Differences Model. Now let's take an organizational look, using the same model. Stay where you are and place a check mark on the model on page 28 where you think we are as an organization.

Now, let's get together in groups.

Diversity Champion Commitments

Championing Diversity

My Commitments as a Diversity Champion

Diversity champions are willing to be open to the contributions of everyone. They believe that working with people different from themselves allows them to create a better way, a higher way. They value and champion differences and practice creative cooperation. This process is called synergy.

Diversity champions:

- Are willing to search for a solution that is better.
- Respect other people's viewpoints.
- Create new ideas.

List one action item under each of the commitments.

As a diversity champion, I will:

- Be proactive.

_____

_____

- Be respectful.

_____

_____

- Be loyal to the absent.

_____

_____

- Value other members of the organization.

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_____

- Focus on treating all customers and co-workers well.

_____

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Valuing Differences Model—Organizational

CHAMPION!

Engagement

Inclusion

Acceptance

Understanding

Awareness

What are some things you could do to move the organization to the next level?

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EXERCISE: ORGANIZATIONAL ACCOUNTABILITY   **25 MINUTES**

Have several pairs get together for this exercise. Do not return to the original table groups yet.

1. **Display Slide 57, "Valuing Differences Model—Organizational."**

This slide builds.

2. **Refer participants again to page 28 in the guidebook.**

3. **State:**

In your groups, share with each other where you placed the organization on the model and explain why.

Allow a few minutes for participants to share. You will find big differences in where participants place the overall organization.

4. **State:**

I would like each team to compile a list of suggestions and recommendations to *[name of organization]* to help it, as a whole, move up the Valuing Differences Model.

Please take good notes at your table. We are going to collect them and take them forward.

5.   **Refer participants to page 29 in the guidebook.**

6.   **Display Slides 58 and 59, "Organizational Best Practices."**

If time permits, review the items on the slide.

7.   **State:**

Now, let's have each group share its ideas with the larger group. Make sure you give me a list of your group's ideas so I can take them forward.

Allow 10 to 15 minutes for this part of the exercise. Have participants take notes and write down action items on page 30 in the guidebook. Debrief by asking for volunteers to share answers; record them on chart paper. Give participants enough time so that everyone can share all of their suggestions. Have them clarify any suggestions that sound ambiguous.

8.   **Ask:**

So, what will you do when you walk out of here?

9.   **State:**

I have one last challenge for you.

Organizational Best Practices

Championing
Diversity

Organizations That Embrace Diversity

Organizations that are committed to diversity use these best practices:

- The entire organization is committed to and aware of the business case for diversity.

- The organization champions diversity for all stakeholders.

- Diversity is part of strategic planning and is one of the organization's guiding principles.

- Diversity principles are diligently applied to recruiting, hiring, retention, and promotion.

- The organization has a strong Equal Employment Opportunity Commission (EEOC) initiative.

- Diversity competencies are reflected in performance appraisals, rewards, discipline, and special assignments.

- Diversity initiatives are allotted adequate resources.

- The organization has a strong diversity champion in its leadership, and mentoring is available.

- Company leaders model and are committed to diversity principles.

- Everyone in the organization receives training in diversity principles and understands his or her role as a diversity champion.

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Organizational Initiatives

List at least one action item in each category.

- Retention and Talent Management

  _____
  _____
  _____
  _____

- Staffing and Talent Acquisition

  _____
  _____
  _____
  _____

- Communication (internal and external)

  _____
  _____
  _____
  _____

- Education and Training

  _____
  _____
  _____
  _____

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REENTRY RESPONSIBILITIES   **5 MINUTES**

1. **Display Slides 60 and 61, "21-Day Action Plan."**

   ### 21-Day Action Plan

   As a leadership diversity champion:

   1. Refer back to the commitments you made on page 27 and plan what you will do in the next three weeks to implement those commitments.
   2. Work with an accountability partner to discuss class insights and action plans.
   3. Communicate your challenges and successes to your partner.
   4. Send a 21-day follow-up letter to your facilitator.

   ### 21-Day Action Plan

   Send a 21-day follow-up letter to :

   [CONSULTANT'S NAME]
   [E-MAIL ADDRESS]

   Include the following:

   1. Areas of awareness for you
   2. Update from follow-up meeting
   3. Your action plans
   4. Overall impression of the workshop

2. **Refer participants to page 31 in the guidebook, and state:**

   I am asking you to send an email to me in 21 days letting me know how you did with your action plan. Here is the information for that email.

   Review the information on the slides.

3. **State:**

21-Day Action Plan

Championing
Diversity

As a diversity champion, you have these responsibilities:

1. Refer back to the commitments you made on page 27 and plan what you will do in the next three weeks to implement these commitments.

2. Work with an accountability partner to discuss class insights and action plans. Schedule a meeting with your partner for next week.

3. Communicate your challenges and successes to your partner.

4. Send a 21-day follow-up letter to your facilitator and include the following information:
   - Increased areas of awareness
   - Update from follow-up meeting
   - Your action plans
   - Overall impression of the workshop

Notes

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Before you complete the evaluations for today's session, allow me to close the workshop with two quick things.

First of all, thank you so very much for your participation and involvement today.

Second, I would like to close with a 3-minute presentation that ties everything we covered today into one powerful sendoff.

FINALE   **10**
MINUTES

1.   **Show the *Finale* PowerPoint presentation.**

2.   **State:**

We have two gifts for you. At your table, you have pocket cards
containing the Cornerstones of Diversity. You also have a CD containing
the presentation you just saw. Feel free to share the presentation at
home, or just watch it anytime to have some encouragement in your
journey.

As you leave, I wish you the best and hope the change toward becoming a
diversity champion allows you to grow and see the world through a
window of opportunity, friendship, community, and humanity.

Please fill out the evaluation and leave it in the back of the room. It was
my pleasure being with you today.

Appendix

This section contains these supplementary materials:

- Boston Homeless Executive
- Cornerstones of Diversity—Detailed Information
- "Cornerstones of Diversity" Kinesthetic Symbols
- Vice President: "I Don't Play Games"
- "Stereotypes Activity" Labels

BOSTON HOMELESS EXECUTIVE

A participant in one of my workshops said, "Yeah, those homeless people on the corner right outside this building—I wish the city would finally pass the ordinance to get rid of them. I am so sick and tired of having to go by them every day or having to go across the street to avoid them."

No sooner did she say that than someone across the room said, "I was that homeless person just two years ago." Because I didn't know the participants' titles, I didn't realize he was a senior executive at the company where we were holding the workshop. So when he made that comment, people laughed nervously and muttered under their breath, "Yeah, like you were homeless." The executive looked right back at them and said, "I wasn't laughing two years ago." People then wanted to know how a company executive possibly could have been homeless just a couple of years ago.

He was very open and said, "I moved to Boston and took a very visible, highly paid position at a company. It was everything I had worked for that would provide for my family financially. Soon after moving here, I made a very wrong financial decision. I lost my job and my reputation. But what hurt even more, I lost my family.

"I don't know if there was one thing that led me to that corner, but when you get hungry, you will do whatever you have to do to eat. I ended up on that street corner for a little over two years. And yes, I remember many of you passing by me and not making eye contact with me or even looking in my direction."

Then someone asked, "How did you get out?" He responded, "One day, someone stopped and talked to me and listened to my story. I understood that was risky, but he heard my story and was willing to help me out. He hired me as a custodian back at his company. I went from being at the top of my game to a custodian. But it was a place to start. I became the best custodian that company had ever had. I worked hard, and not once did I take for granted the importance of that role.

"I got back on my feet—got back to what I know how to do—and worked my way back to where I interviewed for a job here. And I have to be honest, one of the most difficult things ever in my career was my first week here—having to make eye contact with many of you who for years had passed by me because I stood on that street corner. Now, some of you will go out of your way to make sure I see you and acknowledge you, because you now believe I can do something for you. I am the same person, just wearing a different suit."

CORNERSTONES OF DIVERSITY—DETAILED INFORMATION

The cornerstone represents the foundation. In the case of diversity, the organization's or participants' foundations are the principles for diversity.

Cornerstones define what an organization wants each employee to know about diversity. But other definitions and issues are also important. They help participants see why diversity is important, why it needs to be implemented in the organization, and what each person should know about diversity principles.

We are the agenda.

Leveraging diversity means including everyone. This workshop is not a special program for a special group. Anytime you discuss diversity, do not exclude any employee or group. Diversity is inclusive; diversity is about leaving no one behind. When a company looks at a diversity initiative, it looks at how it can include everyone in celebrations, strategies, policy, procedures, and business operations (internally and externally) each day.

We know that coming together is important. Working together is success.

Each day, a company hires employees or transfers employees throughout the organization. The company has existing departments that reflect all types of races, genders, and backgrounds. Working together does not guarantee they are a high-performing team. Leveraging diversity means looking at strategies, systems, procedures, and conduct to ensure that people can work together. Once people learn the importance of respecting each other and how they need to be interdependent to accomplish a goal, they become a high-performing team. High-performing teams are dedicated, respectful, and committed to diversity. They have great attitudes. They understand that diversity helps them achieve their mission.

No idea or issue is more important than respect and dignity—the humanity each person deserves.

Diversity champions recognize and emphasize that each person must be treated with respect. When people are not treated with respect and dignity, they feel they do not matter and do not give their best efforts. Leveraging the full capacity of the workforce starts with respect. Leveraging diversity means treating people the way they deserve to be treated, telling people they matter, and understanding they are unique and qualified individuals.

We eliminate prejudice by educating first, then building strong, empowered, productive, inclusive, and collaborative teams.

If leaders look internally, most will notice that there are some individuals in the organization who harbor prejudice against race, gender, sexual orientation, or other diversity areas. To begin to eradicate prejudice in an organization, you need to educate employees about the meaning of prejudice, where these thoughts originate, and how they destroy high-performing teams. For an organization to accomplish its mission, it has to value what every person adds. The purpose of diversity is to empower all employees—which gives them responsibility, authority, and resources—then trust them to do their jobs. This approach gives them opportunities to be highly productive instead of just surviving.

Being inclusive means you recognize all employees as a vital part of your organization, whether that means inviting them to lunches or celebrations, mentoring, or coaching.

Employees recognize they are valuable. A collaborative environment means each employee is a part of the day-to-day involvement of ideas, respect, and strategy. Employees bring their best effort to provide the best ideas to make the organization great.

We ensure diversity of thought at all levels of the organization.

Diversity champions try to create an environment where diversity of thinking and diversity of thought occur at all levels of an organization. Diversity of thought is how to get inclusive and different thinking in light of a rapidly changing world—to ensure that no one is left out when it comes to important issues and strategies in an organization.

We adapt because the most compelling reason to understand diversity is changing demographics.

The demographics of our nation have changed dramatically in the past 15 years. Innovative and visionary organizations look at demographic changes as they relate to workforce, customer base, marketing, philanthropy, and the business mission. Those organizations also project future demographics to ensure access to the best talents and to adapt to the changing needs of a new customer base.

We look for ways people can add value.

Diversity champions ask, "How does each person add value to the organization? What sets them apart, what makes them unique, what are they doing to make things better, how are they contributing, what are their legacies?"

Solutions are not universal; they must be organizational-specific. Look at the culture and structure of a particular organization or department to recognize what works in one location or department. The same solution may not work in another. Solutions must be based on the people, structure, mission, culture, goals, and how the team works together. The solutions must fit the specifics of the organization.

Diversity is a mindset, not a program. The responsibility to understand the value of leveraging diversity falls on all parts of the organization, especially in the hearts and minds of senior leadership. A diversity paradigm is expressed by the leadership's attitude for valuing people. The responsibility cannot be placed on one specific department. Each employee looks to its senior leadership to be role models on the topic of diversity.

Understanding and leveraging diversity is the right thing to do because it puts you and your organization in compliance with the law. But diversity is also the smart thing to do because it shows that you and your organization respond to demographic shifts as a business/mission imperative.

"CORNERSTONES OF DIVERSITY" KINESTHETIC SYMBOLS

Have participants practice these symbols in the "Cornerstones of Diversity" exercise.

Cornerstone	Kinesthetic Symbol	Description
1. Diversity is about ***inclusion and engagement***— leaving no one behind.		**Inclusion:** Move your arms in front of your body. **Engagement:** With fingertips touching, form a circle with your arms straight out in front of you. **Leaving No One Behind:** With fingertips still touching, move your arms forward toward participants.
2. Synergy can be achieved only when everyone is ***working together***.		**Working Together:** Start from the Cornerstone 1 position. Fold your hands.

Cornerstone	Kinesthetic Symbol	Description
3. Every team member deserves *dignity and respect*.		**Dignity and Respect:** Place your right hand over your heart.
4. Everyone adds value and must have an *equal opportunity* to contribute and achieve.		**Equal Opportunity:** Hold your arms out at your sides in a "shoulder shrug" position and move your hands up in down, like the balances of a scale.
5. High-performance teams *eliminate* the effects of *prejudice*.		**Eliminate Prejudice:** Make each hand into a fist. Cross your arms over your chest at the wrists.

Cornerstone	Kinesthetic Symbol	Description
6. Understanding diversity must occur *at all levels* of the organization.		**At All Levels:** Start from the Cornerstone 5 position. Move one arm up and one arm down, palms facing participants.
7. Diversity solutions must be *situation-specific.*		**Situation-Specific:** Hold your right hand in front of your chest. Point your index finger upward.
8. Diversity is *everyone's responsibility.*		**Everyone's Responsibility:** Start from the Cornerstone 7 position. Trace a circle in the air with your index finger.

Cornerstone	Kinesthetic Symbol	Description
9. You don't have to be **one of to stand with**.		**One of to Stand With:** Move one arm up for "one of"; move the other arm up for "stand with." Hold your arms up at your side.

VICE PRESIDENT: "I DON'T PLAY GAMES"

During one of my workshops, while doing the Kinesthetic Symbols exercise, I could tell that one gentleman was deliberately trying to become invisible to the exercise. He kept moving away from his group, hoping that if he moved far enough, he would not be included. The group was relentless and kept tossing the ball to him every other turn. I could sense how agitated he was getting. After the exercise, the participants applauded the exercise and validated the need for unspoken language—at times when words could easily have made a situation worse.

At lunch, that one gentleman stayed behind. He approached me and asked, "Do you know who I am?" Since all I knew about him was his name, I replied, "John." I then asked, "Mr. John?" He said, "I am second in charge here at this organization, and I am telling you right now that I do not play games." I said, "Okay. If we play a game this afternoon, I will let you know and you can excuse yourself."

He said, "That was a game. I will not send my employees to a training program if all they are going to do is play games." I looked at him and asked, "John, did you not hear me mention that there are different techniques to learning content? Kinesthetic is one of them." He said, "It's a game, so it needs to be taken out of the workshop."

My reply: "John, you do know I am coming back in three days to teach the second pilot. At this point, I do not think we can change the format, nor do I think we would be willing to do so. I need you to then tell me if we will then cancel the next training."

He quickly said, "We cannot cancel it. We have people coming from different offices from around the country to take the workshop. Fine. We go with it 'as is,' but I will be waiting for you after the next workshop to discuss how you will take 'that game' out of the content." I sensed he was not happy that I had moved on to my next task. He wanted to argue more. Really, there was nothing we could do until the next session.

Three days later, I showed up to facilitate the next session with the next group. I usually arrive early to set up for the workshop, and there in the lobby was John. Usually I am not greeted by someone at his level, so I knew one of two things: either I was not getting past him, or something had happened.

I said, "John, I am surprised to be greeted by you. I guess we are going right into talking about 'the game.'" He said, "Oh yeah, but first I have to apologize." I was floored. "I am sorry how I acted and spoke to you the last time you were here. It was totally out of line. I am so embarrassed about how I acted that day that I have also sent a written apology to every participant in that workshop. You didn't know this, but I was sitting at a table with two landscape-maintenance workers, one administrative assistant, and my office manager. You had me doing that activity with *them.* I made myself better when, in fact, many of them are more important to this organization than I am. That was not fair to them. Again, I apologize and I want to let you know that you can continue to do 'the game.'"

I acknowledged his apology and then asked, "Okay, John. What really happened that allowed you to see the value of the unspoken language of the symbols?" This was his reply:

"Three of my managers were in the class with me. They loved the workshop. I could not understand how their takeaway could be so different from mine, but I was not going to take anything away from their reaction. One of those managers is working on a project

that is critical to this organization. Within that project he has an employee who is critical to the outcome and success of the project. She approached us a few weeks back and said she would need to be leaving the organization because of a personal, sensitive family crisis. It was so personal, she did not want it to become fodder for rumors or whispering or even get asked about it. After discussion with her, we promised her that it did not need to become the organization's or people's concern, and that we would work around whatever she needed to do to address the issue in her own way.

"Two days after your class, I met with my managers and that project team. She was present. We started discussing the rollout of the project and schedules. She had a major conflict with the schedule and announced she would not be able to be present for the final week. One of the managers who had not attended the workshop quickly jumped in and said, 'No one is excused from the "live" date, so whatever you have planned, you better just cancel it. We all have known this for weeks.'

"She said, 'I will not be able to keep to that commitment.' Once again the manager chimed in, 'Why? What is so more important than this project that is critical to our bottom line? What can it possibly be?'

"I then looked at her manager (who had been in the workshop), and I could sense he was about to reveal her issue. Out of nowhere, I made eye contact with her manager and I felt my hand go up to the 'dignity and respect' symbol. He acknowledged me and said, 'We will be able to work around her schedule; I will cover.' At that point, I hated you, but then realized the power of the symbol. If I had said to him, 'Don't go there,' it would have violated her dignity and respect—possibly forever, because then people would find a way to find out what was going on. This was her issue, not ours to share, especially since we had promised her to keep it safe. I got it. 'The game' stays!"

CONVERSATIONS

In the Midst of Change

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THE ULTIMATE COMPETITIVE ADVANTAGE

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CONVERSATIONS

In the Midst of Change

....

NAME

CONVERSATIONS

Change Model

In a perfect world, the curve in the Zone of Adoption looks smooth:

RESULTS

ZONE OF STATUS QUO ZONE OF DISRUPTION ZONE OF ADOPTION ZONE OF BETTER PERFORMANCE
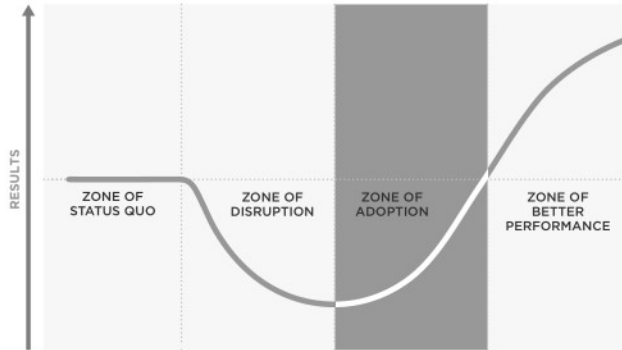
However, in the real world, the curve looks more like this, as you come to terms with the new realities of the change, try new things, and understand what works and what doesn't.
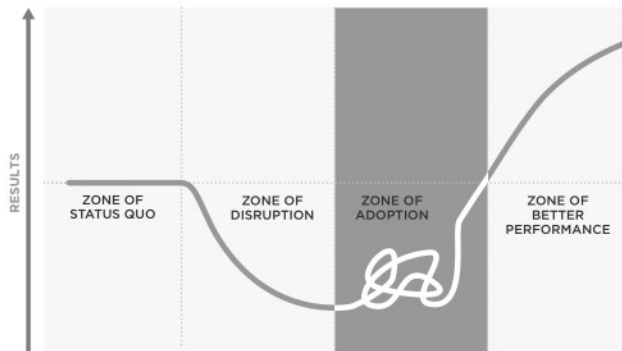
RESULTS

ZONE OF STATUS QUO ZONE OF DISRUPTION ZONE OF ADOPTION ZONE OF BETTER PERFORMANCE

6 /

Insights:

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Impact of Behaviors

LIMITING ZONE

DAMAGING ZONE

HIGH-PERFORMANCE ZONE

Slighted

Ignored

Tolerated

Respected

Harassed

Included

Abused

Valued

Insights:

Ways to Act With Courage

CHOOSE COURAGE

COURAGE TO IDENTIFY

Bias happens at the speed of thought. When we have the courage to identify bias in ourselves and others, we can begin to address the impact it has.

Be courageous and continue to explore the impact of bias for you, for others, and for your organization.

> Pause: Question It

> Seek to Understand

> Check Assumptions

> Learn

CHOOSE COURAGE

WAYS TO ACT WITH COURAGE: COURAGE TO IDENTIFY

Pause: Question It
- Pause before you act.
- *What am I thinking? What am I feeling?*
- *Am I being reactive?*
- *What's causing my reaction?*

Seek to Understand
- Distinguish between facts and feelings.
- Use empathy and curiosity to understand what others are thinking.
- *What's important here? Why?*

Check Assumptions
- *What are the facts? What am I missing?*
- *What have I made up to fill in the gaps?*
- *What assumptions are others making?*

Learn
- Commit to learning about bias.
- Invite others to learn with you.

Ways to Act With Courage

COURAGE TO COPE

Being the subject of negative bias can take a toll on well-being. Coping with the effects of bias looks different in every situation. It could be stepping away, choosing a response beforehand, finding a coach, or even sharing your experience with others.

Prioritize Self-Care

Proactively Choose a Response

Get a Coach or Mentor

Share Your Story

WAYS TO ACT WITH COURAGE: COURAGE TO COPE

Prioritize Self-Care
- Take a break to clear your mind.
- *How do I need to take care of myself now?*
- *How do I deal with this for the long term?*

Proactively Choose a Response
- *What is a bias I often experience?*
- Plan what you can do or say when you face this bias in the future.
- Use the response and keep improving it.

Get a Coach or Mentor
- Choose someone who can help you see alternate perspectives.
- Commit to regular conversations.

Share Your Story
- Capture stories of bias in your life.
- Help others cope by sharing how you cope.

Ways to Act With Courage

CHOOSE COURAGE

COURAGE TO ALLY

Whether you are the subject of bias or not, being an ally can bring about change. Teaming up with others to explore bias can make a significant impact. Offering support, mentoring, or helping another to be heard are powerful ways to address bias.

Team Up With Others
Offer Support
Be a Coach or Mentor
Amplify Others' Voices

CHOOSE COURAGE

WAYS TO ACT WITH COURAGE: COURAGE TO ALLY

Team Up With Others
- Identify a bias that impacts others.
- Find others who want to act as allies.

Offer Support
- Notice who needs support to address bias.
- Use empathy and curiosity to understand.
- Act as a thinking partner.

Be a Coach or Mentor
- Offer to be a mentor or coach to others.
- Commit to regular conversations.
- Learn by listening.
- Share your experiences as appropriate.

Amplify Others' Voices
- Notice trends in meetings and decisions.
- If someone is left out, reinforce their ideas.

Ways to Act With Courage

CHOOSE COURAGE

COURAGE TO ADVOCATE

As an advocate, you take proactive steps to address bias. Advocates educate others and can inspire more people to take action. Building networks to bring people together can have a great impact.

> Enact Group Strategies

> Write About Your Experience

> Organize Networks

> Speak Up

CHOOSE COURAGE

WAYS TO ACT WITH COURAGE: COURAGE TO ADVOCATE

Enact Group Strategies
- Set group goals for making progress.
- Share best practices for addressing bias.

Write About Your Experience
- Tell your story to help people understand your context and perspective.
- Share how you are addressing bias on appropriate media.

Organize Networks
- *What networks exist at work or in my community that I could join?*
- *What new network could I organize?*

Speak Up
- Confront bias with courage and consideration.
- Most people don't intend to be biased, so assume positive intent.

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Executive Order 14035

On Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce

For the Office of Career, Technical, and Adult Education (OCTAE)

March 2022

Office of Equal Employment Opportunity Services

Executive Order Policy Statement

- As the Nation's largest employer, the Federal Government must be a model for diversity, equity, inclusion, and accessibility, where all employees are treated with dignity and respect.

- The Federal Government must strengthen its ability to recruit, hire, develop, promote, and retain our Nation's talent and remove barriers to equal opportunity.

- The Federal Government must provide the resources and opportunities to strengthen and advance diversity, equity, inclusion, and accessibility across the Federal Government.

- The Federal Government should have a workforce that reflects the diversity of the American people.

Executive Order Directives

- Reestablish a coordinated Government-wide initiative to promote diversity and inclusion in the Federal workforce, expand its scope to specifically include equity and accessibility.

- Develop and issue a Government-wide Diversity, Equity, Inclusion, and Accessibility Strategic Plan within 150 days of the date of the order.

- The Government-wide DEIA Plan shall be updated as appropriate and at a minimum of every 4 years.

- Establish an updated system for agencies to report regularly on progress in implementing Agency DEIA Strategic Plans.

Vision and Mission

Federal Government-wide DEIA Vision Statement:
The Federal Government will advance and embed diversity, equity, inclusion and accessibility throughout its workforce.

Federal Government-wide DEIA Mission Statement:
Across the Federal Government, agencies will work collaboratively to drive innovation and organizational outcomes, draw from the full diversity of the nation, and position the Federal Government to serve as a model employer that values and promotes equity for all Americans.

Government-wide DEIA Strategic Plan: Operating Principles

To advance DEIA, agencies should adopt strategies that incorporate five foundational principles. Agencies should:

Use data and evidence-based decision-making

Focus on continuous improvement

Adopt a collaborative whole-of-agency mandate with partnership engagement

Prioritize accountability and sustainability

Understand the perspectives of the workforce and the customers

DEIA Executive Order 11 PRIORITIES

Partnerships and Recruitment

Data Collection

Professional Development and Advancement

Expanding Employment Opportunities for Formerly Incarcerated Individuals

Promoting Paid Internships

Chief Diversity Officer

Pay Equity

DEIA Training and Learning

Advancing Equity for Employees with Disabilities

Advancing Equity for LGBTQ+ Employees

Safe Workplaces

Governmentwide DEIA Strategic Plan: Agency Next Steps

Agency-Specific DEIA Strategic Plan: agencies will develop a DEIA Strategic Plan that will address how they plan to advance DEIA within their workforce and address any potential barriers to equal employment opportunities. The final plan must include a Workplace Safety and Harassment Prevention and Response Plan and is due by March 23, 2022.

Agency DEIA Implementation Teams: agency teams should continue to serve as multifunctional and diverse units, working under the guidance of Chief Diversity Officers or diversity and inclusion officers.

Tracking, Reporting, & Evaluating: agencies should build in quarterly reporting and evaluation processes to track progress as well as create annual goals and take actionable steps to achieve those goals.

DEIA Roadmap Call to Action

Diversity: Hire and promote the nation's best talent and build a diverse and representative workforce.

Equity: Ensure all employees have equal opportunities to advance in their careers and grow as leaders.

Inclusion: Support, utilize, and embrace all employees' talents to create an engaged and high-performing workforce.

Accessibility: Design, develop, and maintain facilities, technology, programs, and services so that all employees can fully and independently utilize.

Thank You!

Diversity, Equity, Inclusion, and Accessibility (DEIA)
In the Federal Workforce

Federal Student Aid | **Virtual** Employee Learning Week **2022**
An OFFICE of the U.S. DEPARTMENT of EDUCATION

Thank You...

CHECK-IN – CHAT BOX

- Put in the chat box one word to describe how you are feeling today (i.e. **excited, happy, blah, awesome, present, etc**).

Or

- Paste in the chat box an emoji that speaks to your current state
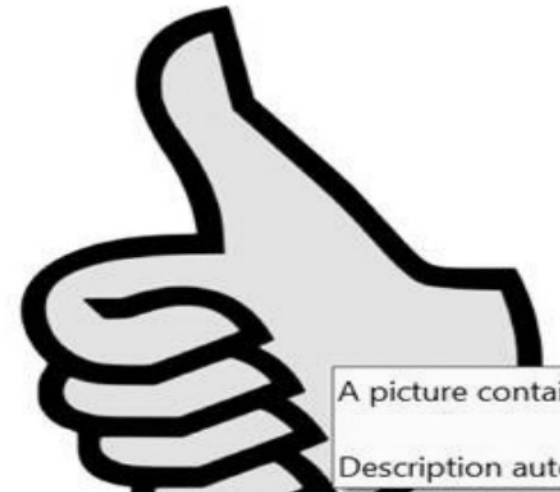
A picture containing l

Description automati

Which of these reasonate with you for an inclusive workplace?

- My ideas
- My viewpoints
- My background
- My personality
- My unique contributions
- My creativity
- My experiences
- My attributes

- Feeling Valued
- Respect for my abilities and experience
- I have access to equal opportunities
- Being accepted and appreciated
- A feeling of belongingness
- Feeling I can bring my whole self to work

4

Presentation Overview

- Our mission
- Overview of Executive Order 14035
- Important Definitions (DEIA)
- On Diversity
- Inclusion (Dignity and Respect)
- On Accessibility
- Secretary's Policy Statement

Safe Space - Learning and Growing

1	2	3	4
Be open to new ideas	Seek to understand differing views	Have a learning mindset	Be present

Pathways to fulfilling the ED Mission…

To promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.

DEIA Mission…

To strengthen and invest in our workforce through a sustained department-wide effort to integrate diversity, equity, inclusion, and accessibility into every aspect of our culture and how we do business.

Building a 21st Century Workforce

"For ED to be a high-performing organization in the 21st century, we must have a workplace that reflects the diversity of the American people, ensure equitable practices, and maintain an environment that is inclusive and accessible. We must lead the way to create a positive work environment where all employees can reach their full potential and maximize their contributions to ED's mission."

Diversity Defined

Diversity: the practice of including the many communities, identities, races, ethnicities, backgrounds, abilities, cultures, religions and beliefs of the American people, including underserved communities.

Executive Order 14035

Historically under-served and under-represented communities

People of color	People with disabilities	Women
Individuals in rural communities	LGBTQ+ individuals	Individuals facing religious discrimination
First generation professionals, college students and immigrants	Individuals with limited English proficiency	Veterans and military spouses
Formerly incarcerated individuals	Older adults	Parents, caregivers, individuals facing pregnancy discrimination
Persons adversely impacted by persistent poverty, discrimination, or inequality		

Definition: "underserved communities": refers to populations sharing a particular characteristic, as well as geographic communities, who have been systematically denied opportunity to participate in aspect of economic, social, and civic life. In the context of the Federal workforce, this term includes those listed on the table.

On Diversity: what "differences" most impact our workplace today? Share your thoughts.

What the Research Shows
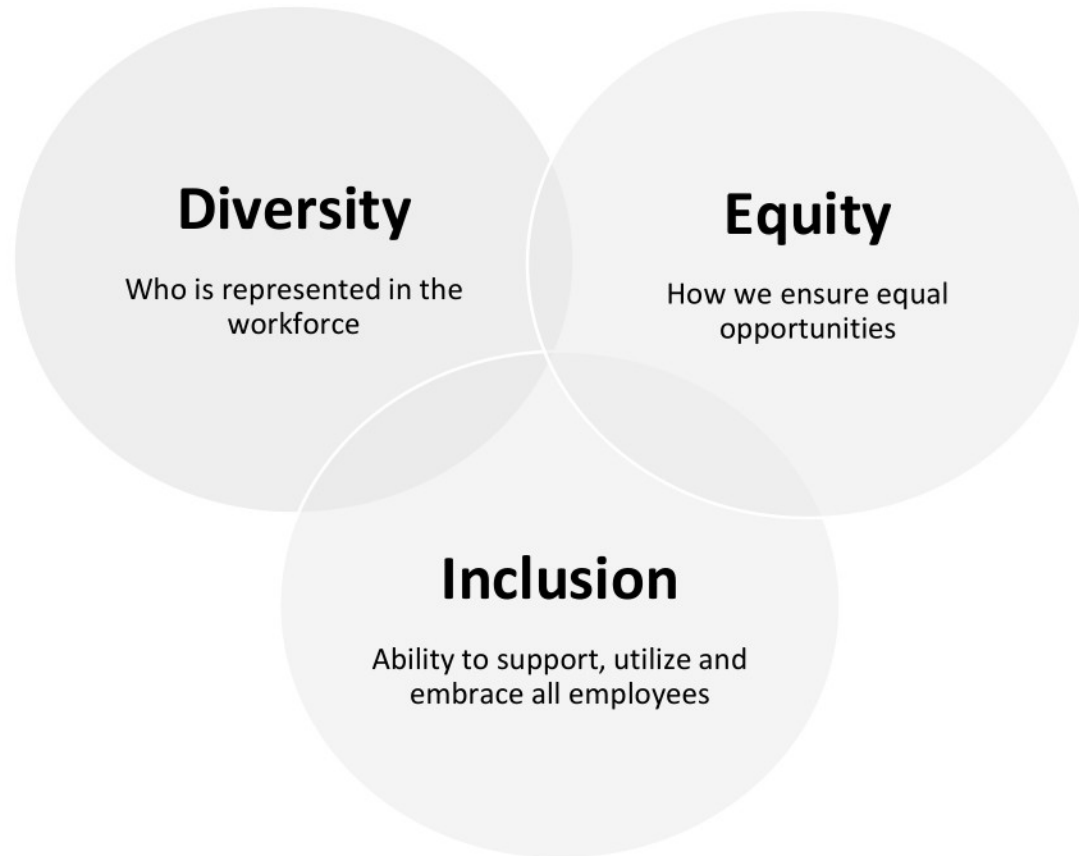
Diversity

Who is represented in the workforce

Equity

How we ensure equal opportunities

Inclusion

Ability to support, utilize and embrace all employees

Ethnically diverse companies are 36% more likely to outperform less diverse organizations.

Employees who perceived that their organization offers both opportunity and fairness are 3X more likely to stay and 3X more likely to recommend the company.

Younger employees are almost 2X more likely to raise the need for inclusion and diversity than other employees.

Madsen, S. R. (2020, July 6). Takeaways from "Diversity wins: How inclusion matters" by McKinsey & Company.
Diversity Wins 202: 2019 Women in the Workplace research.

Why do you think employees who perceived that their organization offers both opportunity and fairness are 3X more likely to stay?

1 There are currently five generations in the workplace working side by side

2 Creating and sustaining a diverse and inclusive work environment is associated with low employee turnover

3 Individuals who identified from the "Millennial" Generation cohort, saw inclusion as a mandatory part of the corporate culture (Deloitte)

4 The digital organization of today, which operates as a network of teams, thrives on empowerment, open dialogue, and inclusive working styles

5 (OPM) reports that inclusive organizations have higher employee engagement, which in turn leads to higher performance and productivity

6 A high-performance organization is one that leverages the total capacity of all its people

What the Research Shows… cont.

What is Equity?

"Because advancing equity requires a systematic approach to embedding fairness in decision-making processes, executive departments and agencies must recognize and work to redress inequities in their policies and programs that serve as barrier to equal opportunity."

"The Federal Government's goal in advancing equity is to provide everyone with the opportunity to **reach their full potential.**"

DEFINITIONS: The term "equity" means the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities…".
(a) The term "underserved communities" refers to populations sharing a particular characteristic, as well as geographic communities, that have been systematically denied a full opportunity to participate in aspects of economic, social, and civic life."

Equity Defined

Equity: the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that historically have been denied such treatment.

- Equal opportunity and fairness
- A safe and respectful workplace
- Work-life flexibilities

Strengthen Abilities to…

Effectively Impacting the Employment Cycle

- Recruit
- Onboard
- Hire
- Train & Develop
- Retain
- Promote

Federal merit system principles include that the Federal Government's recruitment policies should "endeavor to achieve a work force from all segments of society" and that "[a]ll employees and applicants for employment should receive fair and equitable treatment in all aspects of personnel management"

Remove Barriers to Equal Opportunity….

Examples of barriers to equity:

- Burdensome administrative procedures required to access Federal programs

- Historical policies explicitly designed to exclude certain populations

Pay Equity

Fair compensation	• Directs the Office of Personnel Management to review Government-wide regulations and guidance that set pay and wage standards for public servants. • Directs the Office of Personnel Management to consider taking steps to prohibit agencies from seeking or relying on an applicant's salary history during the hiring process and compensation decisions, an important component of advancing pay equity.
Reduces reliance on unpaid internships	• Reduces the Federal government's reliance on unpaid internships, which can create barriers for low-income students and first-generation professionals. • Directs key agencies to take steps to promote the availability of paid internships, fellowships, and apprenticeships to ensure that more Americans can take advantage of these opportunities.

Executive Order 14035

Inclusion Is

- The recognition, appreciation and use of the talents and skills of employees of all backgrounds.

- A culture that connects each employee to the organization by creating an environment of mutual respect, trust, commitment and fostering a <u>sense of belonging.</u>

How Diversity & Inclusion Evolve

Broad
- Requirements-based
- Understand/value differences
- Beyond race, gender, & ethnicity.
- Inclusive culture

Diversity Definition

Narrow
- Discriminated Groups
- Traditional Categories

TIME

Inclusion
- High performance
- Inclusive culture

Diversity
- Organization focus
- Understand/value differences

Affirmative Action
- Eliminate effects of the past
- Target underrepresentation

EEO
- Equal access
- Eliminate discrimination

Diversity Drivers

External Factors
- Law
- Societal Pressure
- Work/Life

Internal Factors
- Workplace factors
- Competitive Labor Markets
- Mission Accomplishment

DRIVERS/SYSTEMS
- Recruiting
- Development
- Training
- Mentorship
- Retention
- Leadership
- Cultural Skills
- Teamwork
- Innovation
- Performance
- Recognition

Source:
Defense Business Board Report 03/01/04
(Modified for Ed) modified for ED

Major Characteristics of Inclusive Leaders

Committed	Brave/Courageous	Aware of Biases
Curious	Culturally Competent	Collaborative

Inclusive Leadership: Commitment

Inclusive leaders have a **deep sense of fairness**

Devote time, energy and resources toward creating a culture of value and belonging; this aligns with their values

Able to combine *intellect* (business case for D&I) **with *emotion*** (viewing people as more than resources)

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Inclusive Leadership: Bravery/Courage

Inclusive leaders:

- **Challenge** entrenched cultures and accepted thinking/practices
- **Act** on their convictions and principles (personal risk-taking)
- **Recognize** their limitations and seek feedback to overcome those limitations
- **Admit to and learn from** mistakes
- Hold themselves and others
- **accountable**

Inclusive Leadership: Aware of Biases

Inclusive leaders know:

Biases inhibit objective decision-making; and

Promote self-cloning

Not sharing authority, power or credit is discouraging and damages relationships

They make an effort to:

Set aside their personal interests and agendas

ID their own biases to prevent them from influencing decision-making

Develop and implement policies/processes to prevent organizational biases

Inclusive Leadership: Curious

Inclusive leaders are lifelong learners

Open-minded

Like to be exposed to new/different things and ideas

Get bored with the status quo

Want to know about others

Set stretch goals for themselves and others

Seek to improve themselves (always evolving)

Engage in respectful questioning

Refrain from making fast judgments

Inclusive Leadership: Culturally Competent

Inclusive leaders are culturally intelligent and **promote cultural competence** by:

- Demonstrating self awareness of their own culture and perceptions of it by others
- Learning about other cultures
- Practicing the ability to understand, communicate with and effectively interact with people of other cultures

Are aware of how stereotypes can be a negative influence and seek to learn and share their knowledge with others

Inclusive Leadership: Collaborative

❏ Inclusive leaders can work through and with others to achieve goals by:

- **Communicating** clearly, often and in a timely manner
- **Empowering and developing** others
- **Unifying** individuals by creating a group identity and shared goals
- **Creating line-of-sight** to provide purpose and meaning
- **Understanding** how different thinkers respond to change and mitigating negative emotions
- **Devising intentional opportunities** for creativity/innovation

Ways to Become an Inclusive Leader (con't)

- ***Intentionally* connect with others**

  - Invite coworkers out for coffee or lunch
  - Offer to listen, without judgment, to a problem, situation or story
  - Encourage someone with a compliment or affirmation
  - Leave a thank you note
  - Leverage humor
  - Create opportunities for brainstorming and creativity

WHAT ELSE CAN WE ADD?

Ways to Become an Inclusive Leader (con't)

- **Learn about people, places, customs and cultures that differ from your own**

  - Join an Employee Resource Group (ERG) or Affinity Group
  - Participate in Special Emphasis Month observances
  - Try to understand about the challenges, successes and contributions of other communities
  - Study a new language (start with basic phrasing)

Create an Inclusive Culture

Daily check in with all members

Mentor people who are different from you

Open dialogue in your teams to identify and address subjectivity, transparency, behavior on a consistent basis.

Make questioning a part of all team meetings, make it part of your "way of doing things."

What is Accessibility?

Accessibility: is the design, construction, development, and maintenance of facilities, <u>information and communication technology</u>, <u>programs</u>, and <u>services</u> so that all people, including people with disabilities, can fully and independently use them.

DEIA: Addition of the "*A*" for *accessibility* recognizes that the concept of diversity, equity and inclusion must be broadened to address barriers to equitable *access*, both **physical and virtual.**

Key Definitions

What is a disability?

According to the ADA, an individual is disabled if:

- Has a physical or mental impairment that substantially limits one or more major life activities
- Has a record of such an impairment
- Is regarded as having a disability

ADAAA expands the definition to include:

- Bodily functions as a major life activity
- Health conditions that are episodic or in remission

What We Know

- In the U.S. population, an estimated one in four Americans has a disability (seen or unseen) DOL

- According to DOL, the current labor force participation rate for people with disabilities is 22.6% compared to those without disabilities at 67.6%

- People with disabilities represent all ages, races, ethnic backgrounds, educational, socio-economic levels and identity factors

- The employment rate of individuals with *targeted disabilities* has the lowest participation rates

Perception Differences

The perception of people with disabilities is vital for full inclusion.

Some differences are apparent across disability categories and can include:

- Veterans who sustained disabling conditions in combat and view themselves as wounded warriors

- Individuals with ADA covered impairments who are often unaware that their medical conditions may rise to the level of ADA defined disability

- Those with non-visible disabilities that are reluctant to disclose their impairments for privacy reasons, concerns about not getting hired, or due to possible stigma

Source: The National Institutes of Health

Executive Order 14035
on

Diversity, Equity, Inclusion, Accessibility

EO 14035 Policy Statement

- As the Nation's largest employer, the Federal Government must be a **model** for diversity, equity, inclusion, and accessibility, where all employees are treated with dignity and respect.

- Accordingly, the Federal Government must **strengthen its abi**lity to recruit, hire, develop, promote, and retain our Nation's talent and remove barriers to equal opportunity. It must also **provide resources and opportunities** to strengthen and advance diversity, equity, inclusion, and accessibility across the Federal Government.

- The Federal Government should have a **workforce that reflects the diversity of the American people**. A growing body of evidence demonstrates that diverse, equitable, inclusive, and accessible workplaces yield higher-performing organizations.

The Government-wide DEIA Plan

This Government-wide Strategic Plan to Advance DEIA in the Federal Workforce (or Governmentwide DEIA Plan) offers a roadmap for implementing the Executive Order and lays out key steps agencies can take to strengthen DEIA in their workforce policies, practices, and culture. The Government-wide DEIA Plan:

- Provides vision and mission statements
- Established five operating principles to advance and sustain DEIA within agencies
- Further outlines the DEIA priorities expressed in the EO
- Details strategies for advancing DEIA
- Provides and examples maturity model to support growth
- Outlines steps to create a comprehensive framework to address workplace harassment
- Explains next steps for advancing DEIA

Data-Driven Approach to Advancing DEIA

Collection of demographic data

- Charges key agencies with reviewing and improving guidance on the collection of demographic data about Federal employees.

- Directs agencies to take an evidence-based and data-driven approach to determine whether and to what extent agency practices result in inequitable employment outcomes, and whether agency actions may help to overcome barriers.

Introduction to ED's Demographic Dashboard

Presenter: Vanessa Tesoriero

Thank you!

U.S. DEPARTMENTOF EDUCATION
DEIA STRATEGIC PLAN
FY 2022-2026

Agenda

- 👁 **DEIA Vision and Mission Statement**

- ⚖ **State of the Agency**

- 👥 **Overview of the DEIA Framework**

- ✓ **Summary of DEIA Goals**

- 🎯 **Summary of Safe Workplace and Harassment Goals**

- 👣 **Next Steps**

State of the Agency

Most Successful DEIA Initiatives and Programs

- Recruitment and Hiring
- Reasonable Accommodations
- Inclusive Workplace Culture

Primary Challenges to Advancing DEIA

- DEIA Organizational Structure
- Professional Development and Promotion
- DEIA Training
- Accessible Work Environment

ED's DEIA Framework

DEIA Infrastructure	Equity in Policy and Practice	Inclusive Culture	Accessibility for All
A results-oriented DEIA office that unifies all DEIA efforts	*Ensure policies and practices are fair and equitable*	*Foster an inclusive culture that embraces diverging experiences and backgrounds*	*Identify and remove barriers in the physical and virtual work environment*
Subcomponents (3) • DEIA Strategy and Framework • DEIA Organizational Structure • Data-Driven Decision-Making	**Subcomponents (6)** • Policy Development • Recruitment and Hiring • Promotion and Professional Development • Retention and Representation • Pay and Compensation • Workplace Safety and Sexual Harassment	**Subcomponents (4)** • Inclusive Workplace Culture • Employee Experience • DEIA Training • Leadership Capability	**Subcomponents (2)** • Accessible Work Environment • Reasonable Accommodation • Accessibility Knowledge and Implementation

Summary of DEIA Strategic Goals

DEIA Strategic Goal 1: DEIA Infrastructure

Build a results-oriented DEIA program that unifies all DEIA efforts and informs all ED's work.

DEIA Strategic Goal 2: Equity in Policy and Practice

Ensure policies and practices are fair and equitable across ED by promoting access, development, and opportunities for all employees.

DEIA Strategic Goal 3: Inclusive Culture

Foster a workplace culture where senior leaders lead by example to model inclusive behaviors and communication that embraces the unique identities and professional contributions of employees in pursuit of achieving ED's mission.

DEIA Strategic Goal 4: Accessibility for All

Identify and remove barriers in the physical and virtual work environment that impede an employee's ability to fully engage and contribute to execution of ED's mission.

Address Workplace Harassment and Promote Safe and Inclusive Workplaces

Maintaining a safe and respectful workplace requires commitment and prioritization from senior leadership, as well as access to relevant tools, policies, and resources to minimize risks to the physical, mental, and emotional well-being of all employees.

DEIA Strategic Goal 1: DEIA Infrastructure

Build a results-oriented DEIA program that unifies all DEIA efforts and informs all ED's work

Sub goal 1.1	Sub goal 1.2	Sub goal 1.3
DEIA Strategy & Framework: Embed DEIA principles and practices into all ED strategic plans to ensure DEIA is a core value, a source of innovation, and a means to sustainable success.	**DEIA Organizational Structure: Establish a department-wide** "Diversity, Equity, Inclusion & Accessibility Program" to unify, coordinate and galvanize DEIA efforts across the department.	**Data-Driven Decision-Making:** Maintain data-driven decision-making as a principle for the DEIA Program to ensure consistent problem identification and accountability practices.

DEIA Strategic Goal 2: Equity in Policy and Practice

Ensure policies and practices are fair and equitable across ED by promoting access, development, and opportunities for all employees.

Sub goal 2.1

- **Policy Development:** Integrate DEIA principles and practices into policies related to talent acquisition, pay, performance management, promotions, professional and leadership development, and retention.

Sub goal 2.2

- **Recruitment and Hiring:** Develop standardized processes and training to bolster any potential decision-points within the hiring and recruiting processes that may be vulnerable to implicit biases and prejudices.

Sub goal 2.3

- **Retention and Representation:** Improve retention rates across underrepresented groups in the workforce to cultivate a stronger sense of belonging.

DEIA Strategic Goal 2: Equity in Policy and Practice (continued)

Sub goal 2.4

- **Professional Development and Promotion:** Review promotion practices with a focus on advancing equitable outcomes, and actively work to mitigate the effects of systemic bias on underrepresented groups in the workforce.

Sub goal 2.5

- **Pay and Compensation:** Institute policies and procedures that proactively work to mitigate barriers faced by employees and supervisors to achieve equitable pay and compensation.

Sub goal 2.6

- **Workplace Safety and Harassment:** Ensure employees and supervisors are properly educated and equipped to address sexual harassment in the workplace, without fear of retaliation.

DEIA Strategic Goal 3: Inclusive Culture

Foster a workplace culture where senior leaders lead by example to model inclusive behaviors and communication that embraces the unique identities and professional contributions of employees in pursuit of achieving ED's mission.

Sub goal 3.1

- **Leadership Capability:** Equip leaders with organizational skills to leverage diversity of thought as well as improve their cultural competence to effectively manage and lead diverse teams.

Sub goal 3.2

- **DEIA Training:** Cultivate continuous learning around DEIA principles and practices to serve as the foundation for sustainable progress.

Sub goal 3.3

- **Inclusive Workplace Culture and Employee Experience:** Propagate an inclusive culture where employees feel a sense of belonging and understand how their work contributes to achieving ED's mission.

DEIA Strategic Goal 4: Accessibility for All

Identify and remove barriers in the physical and virtual work environment that impede an employee's ability to fully engage and contribute to execution ED's mission.

Sub goal 4.1t	Sub goal 4.2	Sub goal 4.3
Accessible Work Environment: Implement a universal design approach to ensure the physical and virtual work environments are both fully accessible to all employees.	**Reasonable Accommodations:** Ensure transparency and efficiency in reasonable accommodation requests, evaluations, and implementation processes to prevent marginalization of employees in need of accommodation.	**Accessibility Knowledge and Implementation:** Increase knowledge and expand internal capacity to regularly apply accessibility practices in all segments of the workforce.

Promote Safe and Inclusive Workplaces and Address Workplace Harassment

The Department's strategic approaches include the following core principles:

- **Principle 1:** Committed and engaged leadership
- **Principle 2:** Consistent and demonstrated accountability
- **Principle 3:** Strong, comprehensive, and consistently applied harassment policies
- **Principle 4:** Trusted and accessible complaint procedures
- **Principle 5:** Regular, interactive training tailored to the audience and the organization
- **Principle 6:** Provide support and assistance to federal employees whose working lives are affected by domestic violence, sexual assault, and stalking (DVSAS)

FY 2022 Next Steps

Organize quarterly meetings with Secretary and Deputy Secretary to monitor progress

Hire a chief diversity officer (Subgoal 1.2)

Review promotion practices and policies (Subgoal 2.4)

Initiate DEIA learning needs assessment (Subgoal 3.2)

Update training, onboarding, and hiring materials around accessibility (Subgoal 4.3)

Develop an Anti-Harassment Policy signed by the Secretary (Principle 1.0)

Thank You...

ED in Action Annual Summit 2022:

Getting to Know the Information Technology Accessibility Program (ITAP)

August 3, 2022

Today's Discussion

MEET — The ITAP Team

LEARN — Why Accessibility Matters

DISCOVER — Ways to Integrate Accessibility into Your Workflow

EXPLORE — ITAP's Resources

Today's Presenters

Denise McGland
ITAP Program Manager

- Responsible for ensuring ITAP's successful operations
- Leadership and expertise has positioned ED to be at the forefront of accessibility compliance across agencies
- Strong and compassionate advocate for equal rights

Sari Kimmel
ITAP Document Accessibility Team Lead/Trainer

- Leading expert in Section 508 compliance and document accessibility
- Driving force behind compliance on hundreds of highly visible documents for Federal clients
- Successfully trained hundreds of professionals across industries on accessibility best practices

ITAP: Who We Are
Ensuring Accessibility for Everyone

Guidelines establishment

Document and Video Support and Testing

Web Audits and Assessments

Hardware and Software Testing

Resources and Information

Education and Training

Help Desk Support

504 Accommodations

Section 508: Removing Roadblocks Between People and Information

Cognitive

Vision

Hearing

Mobility

Where Do You Come In?
Be a Part of the Solution!

Conception

You Are Here!

Creation

Dissemination

Consumption

DISCOVER
Ways to Integrate Accessibility into Your Workflow

General Accessibility Best Practices

Always include alt text for figures that convey meaning

Color should never be used as the only differentiator

Check that text passes color contrast test using <u>webaim.org</u>

Ensure tables are reserved for data with no blank/merged cells

Set line spacing instead of using hard returns

Stop underlining text that isn't a URL/hyperlink

How ITAP Can Help You:

Explore Our Resources!

1 **Visit ITAP's connectED site:**
https://connected.ed.gov/itap/SitePages/default.aspx

2 **Reach out to our Help Desk:**
ITAPSupport@ed.gov

3 **Check out self-paced resources**:
508.gov Training Videos

4 Lookout for **future ITAP-sponsored trainings**

THANK YOU!

New Employee Onboarding

Welcome!

Equal Employment Opportunity
Diversity, Equity, Inclusion, Accessibility

Maria V. Martinez

Agenda

Our Organization

Our Mission

Our Policy on EEO

Prohibited Bases of Discrimination in Federal Government/ED

Federal Sector Complaints Process in ED

Secretary's Message and Policy

DEIA Defined

Accessibility and Reasonable Accommodations

Office of Equal Employment Opportunity Services Organization

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                        ┌─────────────────────┐
                        │      Director       │
                        │    Michael Chew     │
                        └─────────────────────┘
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Okhee Shim Sr. EEO Specialist	Maria V. Martinez EEO Specialist	Jazmine Quintyne EEO Specialist	Symone Stone EEO Specialist	Kenton Stalder Reasonable Accommodations	Beverly Fenwick Management & Program Analyst	Steven Jefferson EEO Specialist	Lisa Costa Sign-Language Interpreter
Section 504 Complaints, & EEO Formal Complaints, SEPM AAPI EP	DEIA Programs Manager SEPM Hispanic EP	EEO Counselor Pre-Complaints SEPM Black EP	EEO Counselor Pre-Complaints SEPM NA/AN EP	RA Program Manager SEPM Disability EP	SEPM Federal Women's Program	Data and Reports Manager	Sign-Language Interpreter

EEO – Equal Employment Opportunity
Sr. – Senior
SEPM – Special Emphasis Program Manager
EP – Employment Program
RA – Reasonable Accommodations
AAPI – Asian American and Pacific Islander
NA/AN – Native American and Alaska Native

Pathways to fulfilling the ED Mission…

To promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.

DEIA Mission…

To strengthen and invest in our workforce through a sustained department-wide effort to integrate diversity, equity, inclusion, and accessibility into every aspect of our culture and how we do business.

Our Policy on EEO

- It is the policy of the U.S. Department of Education to ensure **equal employment opportunity**, prohibit discrimination and harassment in all its forms, and promote **diversity** and inclusiveness in the ED workplace.

- All applicable federal EEO laws are vigorously enforced.

- Reprisal against those who participate in processes designed to eliminate workplace discrimination and harassment is prohibited.

- It is the responsibility of **every** manager and supervisor to ensure a workplace free of discrimination and harassment.

Prohibited bases of discrimination at ED

Prohibited bases of discrimination at ED:

- Race
- Color
- Religion
- Sex (pregnancy discrimination, sexual harassment, transgender, gender identity, sex-stereotype, and sexual orientation)
- National Origin
- Age (40 and above)
- Disability
- Retaliation (for participating in the EEO process or opposing unlawful discrimination)
- Genetic Information
- Political Affiliation*
- Status as a parent*

*ED policy prohibits discrimination on these bases even though they are not covered by EEO Laws or Title VII of the Civil Rights Act. Special complaint processing rules apply for these bases. (CSRA-1978)

The Federal Sector EEO Complaints Process

The Federal Sector EEO Complaints Process provides Federal employees or applicants for employment a venue for due process concerning allegations of discrimination.

If discrimination is found, the process provides for "make whole" remedies for complainants.

Our Role

Provide employees with an avenue of redress for employment discrimination complaints

Process/investigate complaints of unlawful employment discrimination at the Department of Education

- At all times, OEEOS serves as a neutral party in the EEO complaint process
- OEEOS does not represent or advocate on behalf of individual employees or managers

Attempt to resolve allegations of discrimination

Provide training on EEO laws and regulations

Initiating an EEO Complaint

If you believe you have been subjected to unlawful discrimination and would like to initiate the EEO complaint process…

Contact EEOS within 45 days of the action you allege to be discriminatory

- E.g., within 45 days of the date you learn you were not selected for a promotion
- E.g., within 45 days of the effective date of a suspension without pay

Failure to contact EEOS within 45 days will likely result in the dismissal of your complaint

- See 29 C.F.R. § 1614.107(a)(2).

Building a 21st Century Workforce

"For ED to be a high-performing organization in the 21st century, we must have a workplace that reflects the diversity of the American people, ensure equitable practices, and maintain an environment that is inclusive and accessible. **We must lead the way to create a positive work environment where all employees can reach their full potential and maximize their contributions to ED's mission**."

Diversity, Equity, Inclusion and Accessibility

Level-setting: Definitions

➢ **Diversity** = Recognizing the individual differences within a person *(Having a seat at the table)*

➢ **Equity** = Fairness and access to equal opportunities in policies and programs

➢ **Inclusion** = Ensuring all people feel welcomed and appreciated for who they are *(Having a seat and a voice)*

➢ **Accessibility** = Practice of making information and facilities usable by as many people as possible

All are equally important to have in an organization.

Secretary's Policy Statement on Diversity, Equity, Inclusion, and Accessibility

THE SECRETARY OF EDUCATION
WASHINGTON, DC 20202

October 5, 2021

MEMORANDUM TO ALL DEPARTMENT EMPLOYEES

SUBJECT: Policy Statement on Diversity, Equity, Inclusion, and Accessibility

The Policy of the U.S. Department of Education (ED) is to ensure that diversity, equity, inclusion, and accessibility are integral parts of our day-to-day management and work. One of our core missions is to ensure equal access to educational opportunities. In carrying out this mission, we must set a strong example in our own workforce by continuing to acknowledge, appreciate, and respect the differences we recognize in one another.

As a Federal Government employer, we must strive to be a model for diversity, equity, inclusion, and accessibility, where all employees are treated with dignity and respect. Accordingly, we must continue to strengthen our ability to recruit, hire, develop, promote, and retain our Nation's talent and remove barriers to equal opportunity. This includes advancing opportunities for communities that have historically faced employment discrimination and professional barriers. We must also continue to provide the resources to strengthen and advance diversity, equity, inclusion, and accessibility across ED.

Research and evidence show that diverse, equitable, inclusive, and accessible workplaces yield higher-performing organizations. In order for ED to be a high-performing organization in the 21st century, we must have a workplace that reflects the diversity of the American people, ensure equitable practices, and maintain an environment that is inclusive and accessible. We must lead the way to create a positive work environment where all employees have the opportunity to reach their full potential and maximize their contributions to ED's mission. We recognize that continued success in meeting the needs of our employees and customers, including underserved communities both internal and external, requires the full and active participation of all our staff.

All individuals are welcome at ED, regardless of race, color, age, national origin, sex, transgender status, gender identity, sexual orientation, pregnancy, religion, disability, genetic information, marital status, political affiliation, parental status, and those individuals from underserved communities, including formerly incarcerated individuals, or those who have engaged in prior Equal Employment Opportunity activities. Diversity not only complements our organizational values of teamwork, leadership, empowerment, and service quality, but also encompasses the way we work, the work environment, and respect for all people and their ideas.

We all share the responsibility and must reaffirm our commitment to ensure a workplace that is welcoming in ED. I encourage all employees to actively embrace these principles in all that we do to deliver ED's mission and to make ED the best place to work.

Miguel A. Cardona, Ed.D.

"Diversity, Equity, Inclusion and Accessibility are an **integral** part of our daily work."

"ED must set a strong example in the workforce ."

"ED must strive to appreciate, acknowledge and respect differences."

"Be a model for DEIA where all employees are treated with dignity and respect."

"Lead the way to create a positive work environment that is inclusive."

" "We all share the responsibility and must reaffirm our commitment to ensure a workplace that is welcoming and make ED the best place to work.

What is Accessibility?

Accessibility: is the design, construction, development, and maintenance of facilities, information and communication technology, programs, and services so that all people, including people with disabilities, can fully and independently use them.

What is a Disability?

Person with a disability:
• Someone who has a physical or mental impairment that substantially limits one or more major life activities

The U.S. Department of Education is required by law to provide reasonable accommodation to qualified individuals with disabilities, unless doing so would impose an undue hardship to the agency.

Reasonable Accommodation

- **<u>Reasonable accommodation is:</u>**

  any change to a job, the work environment, or the way things are usually done that allows an individual with a disability to apply for a job, perform job functions, or enjoy equal access to benefits available to other individuals in the workplace.

- The U.S. Department of Education is required by law to provide reasonable accommodation to qualified individuals with disabilities, unless doing so would impose an undue hardship to the agency.

- The Department is committed to providing reasonable accommodation to individuals to requesting a religious accommodation in accordance with the law, unless doing so imposes a hardship on the agency.

Agency Program Managers:
Kenton Stalder at Kenton.Stalder@ed.gov
Liana Nieves at Liana.Nieves@ed.gov

Reasonable Accommodations Examples

Assistive Devices
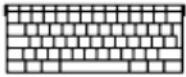
Providing Readers and Interpreters

How you can get involved in ED

Outreach & Engagement	
	ED's Diversity and Inclusion Council
	ED's Diversity Change Agent (DCA) Program
	Employee Resource & Affinity Groups
	Special Emphasis Programs
	DEIA Webpage and Share Point sites
	Training and Education opportunities
	Professional Organizations/Partners – White House Initiatives,

Thank you and Welcome to Education!

Equity in Data

Improving ED and Education Data

Allyson Criner Brown, MPA
Equity and Community Engagement Practitioner-Scholar

August 3, 2022

Data, Engagement, and Collaboration for Equitable Outcomes

Lessons from Engaging Public School Families

School #1

STUDENT DEMOGRAPHICS (2020-21)

Enrollment: **297**
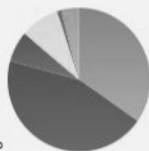
- Black: 35%
- Hispanic/Latino: 45%
- White: 7%
- Asian: 9%
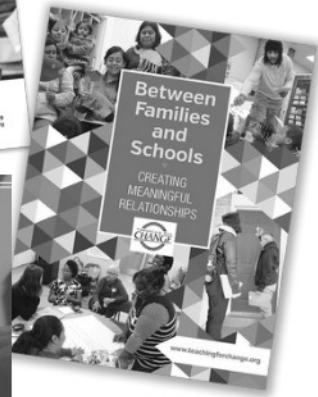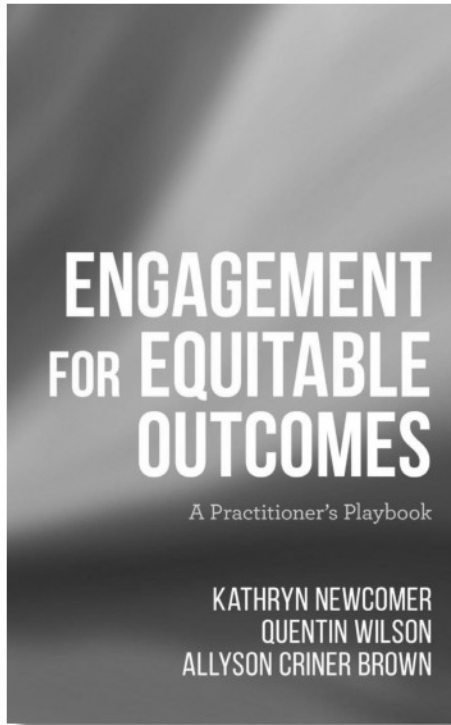- Pacific/Hawaiian: 0%
- Native/Alaskan: 1%
- Multiple races: 4%

English language learners	46%
Economically Disadvantaged	100%
Special education	9%
In-boundary	56%

STUDENT PERFORMANCE AT A GLANCE

PARCC Math
Student Performance

18-19 | 9% | 25% | 33% | 31% | 3%

PARCC ELA
Student Performance

18-19 | 15% | 28% | 26% | 29% | 2%

- Level 1
- Level 2
- Level 3
- Level 4
- Level 5

School #2

STUDENT DEMOGRAPHICS (2020-21)

Enrollment: **358**

- Black: 90%
- Hispanic/Latino: 7%
- White: 3%
- Asian: 1%
- Pacific/Hawaiian: 0%
- Native/Alaskan: 0%
- Multiple races: 0%

English language learners	5%
Economically Disadvantaged	100%
Special education	12%
In-boundary	54%

STUDENT PERFORMANCE AT A GLANCE

PARCC Math
Student Performance

18-19 | 12% | 23% | 29% | 32% | 4%

PARCC ELA
Student Performance

18-19 | 12% | 26% | 28% | 30% | 3%

- Level 1
- Level 2
- Level 3
- Level 4
- Level 5

Source: DC Public Schools (DCPS) School Profiles
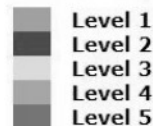
Lessons from Engaging Public School Families

School #1

School #2

Photos courtesy of Teaching for Change

Data *and* Engagement for Equitable, Measurable Outcomes (DEEMOS)
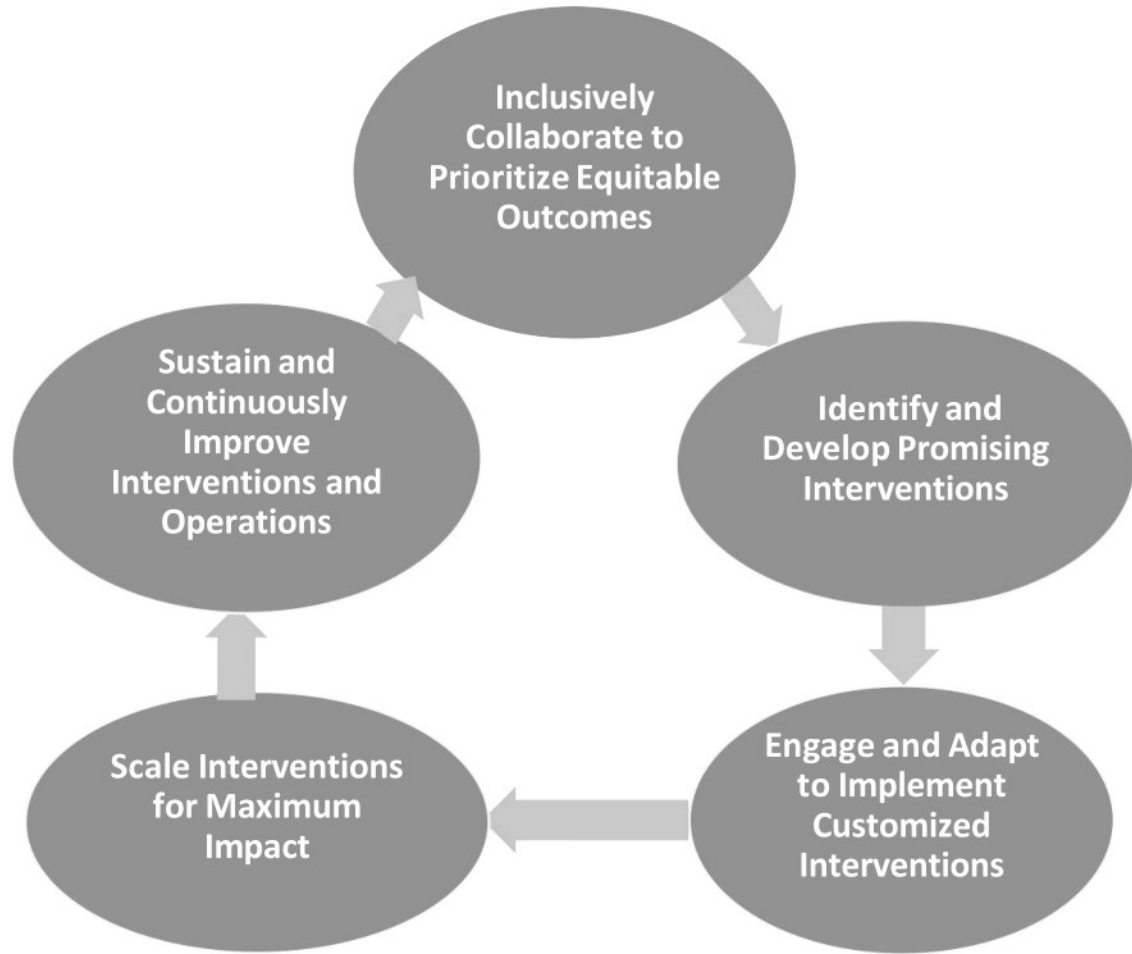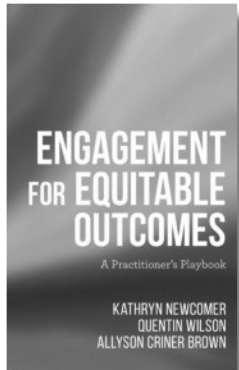
Equity in Data: Process and Outcomes

- Co-create ways for all stakeholders to interact

  - Respectful of culture and context

  - Build trust and authentic relationships

  - Address barriers to participation

- Jointly identify structural and legal drivers of inequitable outcomes relevant to the problem to be addressed

- Co-design approaches and/or adaptations to promising "evidence-based" interventions with impacted stakeholders
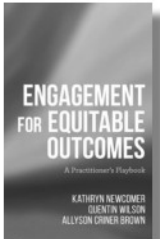
Equity in Data: Process and Outcomes

- Co-create program and policy frameworks, data and evaluation requirements, and human interactions that are respectful of and grounded in culture and context

- Collaboratively, make sense of all information collected about policy or program implementation and evaluation to inform decision-making, including:

  - Determining the effectiveness of an intervention

  - Costs and timeline

  - Unintended side effects

  - Emerging problems or challenges

  - Strategies to pursue equity and mitigate disparities

    - i.e. that mitigate burdens and negative outcomes, or that advance opportunities and positive outcomes for groups of focus
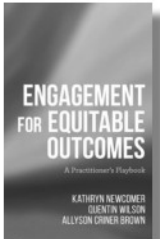
Thank You
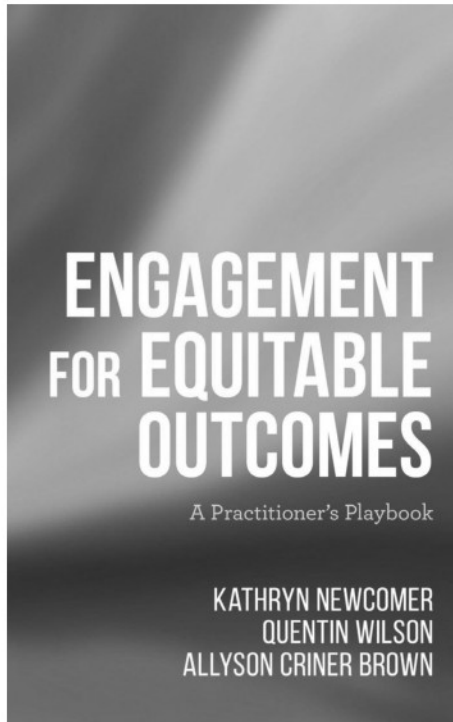
Allyson Criner Brown can be reached on LinkedIn and at:

a.crinerbrown@gmail.com
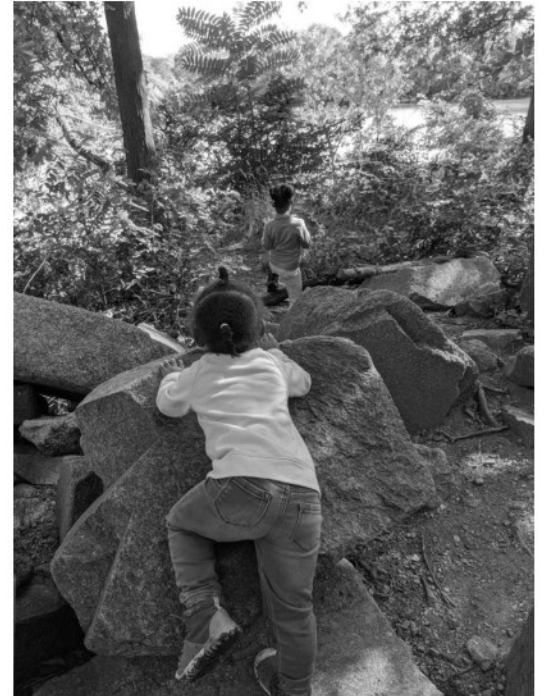
Photo courtesy of Allyson Criner Brown

Recommended Reading

- ***Engagement for Equitable Outcomes: A Practitioner's Playbook*** by Kathryn Newcomer, Quentin Wilson, and Allyson Criner Brown (2022)

- ***No BS (Bad Stats): Black People Need People Who Believe in Black People Enough Not to Believe Every Bad Thing They Hear About Black People*** by Ivory Toldson (2019)

- ***Why Am I Always Being Researched? A Guidebook for Community Organizations, Researchers, and Funders to Help Us Get from Insufficient Understanding to More Authentic Truth*** from Chicago Beyond (2019)

- ***Doing Evaluation in Service of Racial Equity*** from Every Child Thrives/WK Kellogg Foundation (2021)

- ***The Results-Based Accountability Guide*** from Clear Impact (2022)

ENGAGEMENT FOR EQUITABLE OUTCOMES

A Practitioner's Playbook

KATHRYN NEWCOMER
QUENTIN WILSON
ALLYSON CRINER BROWN

Employee Assistance Program (EAP) Resources

Explore FOH4You

FOH4You is a confidential counseling and referral service designed to help you and your family successfully manage everyday challenges and work through personal or work-related concerns.

This website is full of valuable information, educational materials, and tools that can help you better understand and address key behavioral health issues (such as depression, stress, anxiety, and substance abuse), improve relationships, sharpen skills, achieve greater work/life balance, and tend to legal and financial matters.

Counseling

Legal, Financial, and Identity Theft Help

Supervisor Support

Live and On-Demand Webinars

Newsletters

Resilience

Community Resources

Benefits and Eligibility

Need help?

Look for the **Live Chat** button on the right side of each page.
Live Chat is available Monday-Friday from 8:00am to 6:30pm ET. If you send a message outside of these hours, someone will respond the next business day. For technical issues, call 1-800-424-6008.

https://magellanascend.com/?ccid=hpZiwITni%2FVKNrZqvUQNB6H843mPpM26&P9mLkU80g%3D#carouselExampleIndicators

(TTY): 888-262-7848
800-222-0364

PRESENTATION OVERVIEW

- Integration and mainstreaming
- Fully inclusive schools and general or special education policies
- Classification of students and educational practices
- Legal issues: education law and disability laws
- Inclusion rates in the world: "frequency of use"

WHICH OF THESE DO YOU FEEL ARE IMPORTANT TO YOU IN AN INCLUSIVE WORKPLACE?

- My ideas
- My viewpoints
- My background
- My attributes
- My personality
- My uniqueness
- My creativity
- My experiences
- Feeling Valued
- Being accepted and appreciated
- Feeling that I belong
- Feeling I can bring my authentic self to work

SAFE SPACE - LEARNING AND GROWING

1

Be open to new ideas

2

Seek to understand differing views

3

Have a learning mindset

4

Be present

Fulfilling the ED Mission...

To promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.

Dedicated to:

- Establishing policies on federal financial aid for education and distributing as well as monitoring those funds.

- Collecting data on America's schools and disseminating research.

- Focusing national attention on key educational issues.

- Prohibiting discrimination and ensuring equal access to education.

BUILDING A 21ST CENTURY WORKFORCE

"For ED to be a high-performing organization in the 21st century, we must have a workplace that reflects the diversity of the American people, ensure equitable practices, and maintain an environment that is inclusive and accessible."

WHAT IS INCLUSION?

▪Inclusion is …

▪A culture that connects each employee to the organization by creating an environment of mutual respect, trust, commitment and fostering a sense of belonging.

Uniqueness

Belonging

Inclusion

EO 14035 POLICY STATEMENT

- As the Nation's largest employer, the Federal Government must be a **model** for diversity, equity, inclusion, and accessibility, where all employees are treated with dignity and respect.

- Accordingly, the Federal Government must **strengthen its abi**lity to recruit, hire, develop, promote, and retain our Nation's talent and remove barriers to equal opportunity. It must also **provide resources and opportunities** to strengthen and advance diversity, equity, inclusion, and accessibility across the Federal Government.

- The Federal Government should have a **workforce that reflects the diversity of the American people**. A growing body of evidence demonstrates that diverse, equitable, inclusive, and accessible workplaces yield higher-performing organizations.

EO 14035

DIVERSITY, EQUITY, INCLUSION, AND ACCESSIBILITIY IN THE FEDERAL WORKFORCE

- The Federal Government must become a model for the employment of individuals with disabilities.

- A workforce that includes people with disabilities is a stronger and more effective workforce.

- Agencies must provide an equitable, accessible, and inclusive environment for employees with disabilities.

- Accessible information technologies must be provided.

- Reasonable accommodations must be available that will allow qualified individuals with disabilities to perform the essential functions of their positions and access advancement opportunities.

DIVERSITY, EQUITY, INCLUSION AND ACCESSIBILITY IN THE FEDERAL WORKFORCE

- Accessible information, communication technology and assistive technology

- Compliance with Section 501, 504, and 508 of the Rehabilitation Act

- Reasonable Accommodations

- Accessible buildings and workplace

- Applicants and employees with disabilities have access to information about, understand their rights to, and may easily request reasonable accommodations, workplace personal assistance services, and accessible information and communication technology;

EO 14035: DISABILITY-RELATED THEMES

- Inclusion of disability (definition of "underserved communities" and Section 10: Advancing Equity for Employees with Disabilities)

- "Diversity and inclusion" expanded to include "equity" and "accessibility"

- Promote and adopt data-driven approaches

- Measure demographic representation and trends, including

  - intersectional analysis

- Report progress, establish standards of success, and make plans and reports publicly available

- Identify strategies to advance DEIA

- Aspects of DEIA particularly applicable to individuals with disabilities

Diversity: the practice of including the many communities, identities, races, ethnicities, backgrounds, abilities, cultures, religions and beliefs of the American people, including underserved communities.

Equity: the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that historically have been denied such treatment.

Inclusion: the recognition, appreciation, and use of the talents and skills of employees of all backgrounds and beliefs.

Accessibility: the design, construction, development, and maintenance of facilities, information and communication technology, programs, and services so that all people, including people with disabilities, can fully and independently use them.

DEFINING TERMS

KEY DEFINITIONS

Person with a disability:

- Someone who has a physical or mental impairment that substantially limits one or more major life activities

Reasonable accommodation:

- Any modification to the work environment, or the way a job is done, that enables someone with a disability to apply for or perform a job

DEI**A**: THE NEW DEI

- Addition of the "A" for *accessibility* recognizes that the concept of diversity, equity and inclusion must be broadened to address barriers to equitable *access*, both physical and virtual.

Americans with Disabilities Act

Prohibits discrimination and protects the rights of people with disabilities in public accommodations, jobs, transportation, government services, and telecommunications

Disability Policy in the Federal Government

As the Nation's largest employer, the Federal Government has a singular responsibility to lead by in supporting diversity, equity, inclusion and accessibility for individuals with disabilities in the workforce.

SECTION 508 OF THE REHABILITATION ACT OF 1973

- Applies to developing, procuring, maintaining, or using electronic and information technology

- Must give people with disabilities comparable access

- Design of products, devices, services, or environments so people with disabilities can use them unassisted or in a way that's compatible with their preferred assistive technologies.

ACCESSIBILITY?

Anything that increases, maintains, or improves the functional capabilities of persons with disabilities
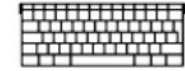
WHAT IS ASSISTIVE TECHNOLOGY?

LAWS AND REGULATIONS

- Section 504 of the Rehabilitation Act of 1973

- Section 501 of the Rehabilitation Act of 1973, as amended, and Implementing Rule

  - EEOC Management Directive 715 (MD-715)

- Section 508 of the Rehabilitation Act of 1973, as amended

- Architectural Barriers Act of 1968

SECTION 504 OF THE REHABILITATION ACT OF 1973

- Precursor to the Americans with Disabilities Act

- Prohibits discrimination of qualified individuals with disabilities

- Requires qualified individuals with disabilities be provided accommodations

- Supervisors, employees engage in an interactive process to determine effective accommodation

SECTION 501 AND IMPLEMENTING RULE

- Places two distinct obligations on federal agencies:

  - Prohibits discrimination against qualified individuals with disabilities, using same standards as Title I of the ADA

  - Requires each agency to submit to the EEOC an annual plan for the hiring, placement, and advancement of individuals with disabilities

SECTION 508 OF THE REHABILITATION ACT OF 1973

- Requires all electronic and information technology (also referred to as information and communication technology, or ICT) that is developed, procured, maintained or used by a federal agency to be accessible to people with disabilities.

- Includes developing, procuring, maintaining, or using electronic and information technology

- Comparable access

ARCHITECTURAL BARRIERS ACT OF 1968

- Requires access for people with disabilities to facilities that are designed, built, altered or leased with federal funds

INFORMATION TECHNOLOGY ACCESSIBILITY PROGRAM

- Comply with Section 508, Rehabilitation Act of 1973

- Comply with Section 504 opportunity to request Information Technology Needs Assessments

- Community of Action for 508 compliance and Information Technology Needs Assessments

- Resources and tools with passing 508 testing

- Information Communication Technology (ICT) disabilities access

connectED ▶▶ Information Technology Accessibility Program (ITAP)

Contacts   Accessibility Reviews   IT Needs Assessments   Document Accessibility ▾   508 News and Events   Resources   Commu

ITAP
Information Technology Accessibility Program

ED Section 508 Exception Authorization Form

ED Section 508 Remediation Plan

Section 508 Accessibility Workaround Plan

Section 508 Exceptions Worksheet

Section 508: Information and Communication Technology (ICT) Standards, Guidelines and How to Meet WCAG 2.0

ED'S ALTERNATE FORMAT CENTER

- The Alternate Format Center and ED resource, produces documents for employees and members of the public with disabilities:

  - Braille

  - Large Print

  - Electronic Format

  - Read and Write tools scan to accessible PDF, Word or HTML format

  - Agendas

  - Correspondence

  - Course Materials

  - Regulations

- ED'S INTERPRETING/COMPUTER ASSISTED REAL-TIME TRANSCRIPTION SERVICES (CART)

  - American Sign Language/oral/tactile-interpreting services for communication access
  - Captioning

- ED'S REASONABLE ACCOMMODATIONS PROGRAM

  - Section 504 Rehabilitation Act of 1973
  - Fairness
  - Program Managers (LBJ, FSA)
  - Centralized Funding for RA in ED

- ED'S DISABILITY AWARENESS TRAINING

  - Laws and the RA Process
  - Communicating and Interactions
  - Accessibility for employees with disabilities

- ASSISTIVE TECHNOLOGY TEAM SERVICES

  - Needs Assessments (ergonomic)
  - Video Captioning
  - Federal Relay Services

RESOURCES AT ED

- Reasonable Accommodation:
- reasonableaccommodation@ed.gov
-

- Alternate Format Center:
- Tena.Witherspoon@ed.gov
- Tracey.Flythe@ed.gov

- Needs Assessments:
- Stephanie.Woerner@ed.gov

- 508 Program Manager
- Denise.McGland@ed.gov

Web Accessibility:
Terri.Youngblood@ed.gov

Sign Language Interpreting and Captioning Services (CART):
interpretingservices@ed.gov

Document Accessibility:
Denise.McGland@ed.gov

Disability Resource Group:
DRG@ed.gov

Diversity → Equity → Inclusion → Accessibility

ACCESSIBILITY	INCLUSION
Opens the door to an equivalent experience (equality of opportunity)	Provides the same experience for all people.
Considers individuals with varying abilities and differences.	Includes individuals with varying abilities and differences before and during the design process.
Usually refers to accommodations for individuals with disabilities	Designed for all people. Those with disabilities as well as those who speak other languages, observe different religions etc.
Designing after the fact by making adaptations, and/or creating new and specialized designs for individuals with disabilities.	Designing from the beginning, products and environments that can be used by all.
Access for people with disabilities	Full/equal opportunity to participate in all programs, services, benefits for the federal government in an inclusive environment.

CALL TO ACTION

- Engage in ED's DEIA programs and activities: contact us for continued education, training, and awareness opportunities

- Take the opportunity to capitalize on the many advantages of inclusive environments.

ED in Action: Inclusive Communications

08/03/2022

Federal **Student Aid**
An OFFICE *of the* U.S. DEPARTMENT *of* EDUCATION

AGENDA

What is a Micro-Aggression?

MICROAGGRESSIONS
EXPLAINED WITH MOVIES

What is Micro-messaging?

Micro-inequity (also known as Micro-aggression)

Micro-affirmations

Ways we send subtle messages positively or negatively

Examples of Micro-messaging in the Workplace

Non-Verbal	Verbal
• **Eye rolling** • **Change in body posture** • **Change in hand movements** and gestures • **Fake**, masked, or forced smiles • **Reading/sending emails/texts** during conversation • **Avoidance of eye contact** • **Left out** of discussion/project • **Not being introduced** then ignored	• **Cutting down ideas** before they can be entertained • **Mispronouncing**/misspelling name…frequently • **Change in voice pitch**, volume, or rate • **Interrupting**… constantly

Tips to Address Micro-inequities in the Workplace

Be mindful: Allow yourself time to stop and think before reacting to a given situation.

Challenge yourself to get out of your comfort zone. First seek to understand.

Discuss concerns from others and ask questions for awareness and understanding

Educate yourself (e.g., read books, take courses, attend public outings) from different perspectives; and

Finally, consider your known biases and strive to remove them.

Federal**StudentAid**

What is a kind of Asian are you?

Speaker – Nathaniel H. Benjamin

Nathaniel H. Benjamin is a career senior executive and "people's champion" with over 18 years of experience in human capital, diversity, equity, and inclusion, and leadership/executive coaching. In June 2022, Mr. Benjamin was appointed to AmeriCorps as the first Chief Diversity & Inclusion Officer. In this capacity, Mr. Benjamin leads the Agency's Office of Diversity, Equity, Inclusion, and Accessibility and agency equity initiatives in line with President Biden's 2021 Executive Order 13985 on Advancing Racial Equity and Support for Underserved Communities.

Mr. Benjamin's most recent appointment was at the Department of Education as the Agency's Deputy Chief Human Capital Officer. Mr. Benjamin served as a change strategist and provided executive leadership for the operational functions of the Agency's human capital management program. Additionally, Mr. Benjamin was the managing executive for ED's D&I Council.

Prior to joining the Department of Education, Mr. Benjamin served as the Human Capital Director and Deputy Chief Human Capital Officer at the Executive Office of the President, Office of Management and Budget (OMB). At OMB, he led its human capital office and directed the Agency's human capital strategy, workforce development, employee engagement initiatives, and directed the development of its diversity and inclusion plan.

Before joining OMB, Mr. Benjamin served as the Deputy Human Resources Officer for the T Bureaus at the U.S. Department of State where he led the civil service staff for three bureaus supporting its arms control and international security missions.

Over a 22-year career, Mr. Benjamin has served as a noncommissioned officer in the United States Air Force, a civil servant for the Department of Defense and an adjunct instructor for several local institutions of higher learning. Additionally, Mr. Benjamin is a certified professional coach and executively trained in strategic diversity, equity, and inclusion management through Georgetown University. He is the recipient of several awards for his superior leadership and notable results as a change agent of federal human resources and DEI programs.

Mr. Benjamin is an alum of the University of Maryland Eastern Shore, University of Baltimore, and Johns Hopkins University. As a native of Washington, DC, he is the husband to Angela Benjamin and the proud father of a son, Andrew and a daughter, Naomi.

Fireside Chat

Questions and Answers

Resources

People

EEOC

Leadership Coaches

EAP

Diversity Change Agents

Colleagues

Supervisors

Language Style Guides

https://www.diversitystyleguide.com/about/

https://www.pratt.edu/uploads/Pratt-Inclusive-Language-Guide.pdf

https://www.apa.org/about/apa/equity-diversity-inclusion/language-guidelines.pdf

Videos

Inclusive Language Guide (2:11) by Cosumnes CSD Parks & Recreation, Elk Grove, California

Inclusive Language (2:40) by Virtual High School, Ontario, Canada

What is the definition of microaggression (4:29) by Quartz

ED in Action Annual Summit 2022:

Getting to Know the Information Technology Accessibility Program (ITAP)

August 3, 2022
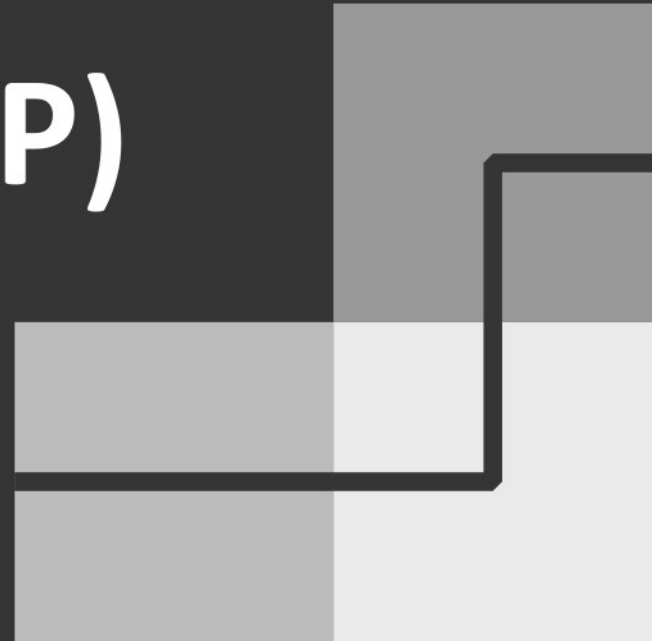
Today's Discussion

MEET — The ITAP Team

LEARN — Why Accessibility Matters

DISCOVER — Ways to Integrate Accessibility into Your Workflow

EXPLORE — ITAP's Resources
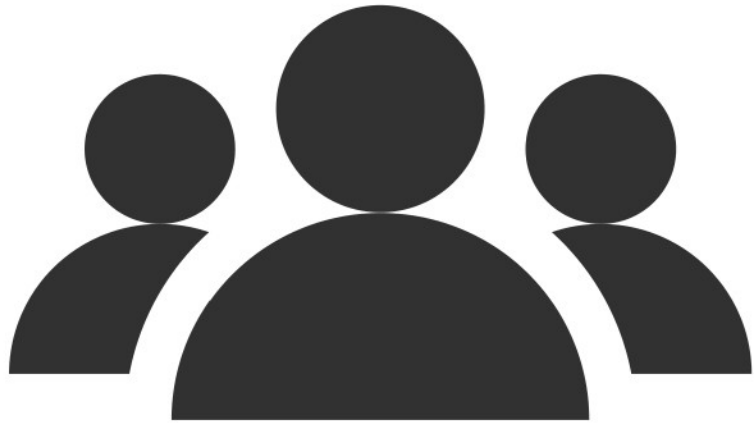
MEET
The ITAP Team

Today's Presenters

Denise McGland
ITAP Program Manager

- Responsible for ensuring ITAP's successful operations
- Leadership and expertise has positioned ED to be at the forefront of accessibility compliance across agencies
- Strong and compassionate advocate for equal rights

Sari Kimmel
ITAP Document Accessibility Team Lead/Trainer

- Leading expert in Section 508 compliance and document accessibility
- Driving force behind compliance on hundreds of highly visible documents for Federal clients
- Successfully trained hundreds of professionals across industries on accessibility best practices

ITAP: Who We Are

Ensuring Accessibility for Everyone

Guidelines establishment

Document and Video Support and Testing

Web Audits and Assessments

Hardware and Software Testing

Resources and Information

Education and Training

Help Desk Support

504 Accommodations

LEARN
Why Accessibility Matters

Section 508: Removing Roadblocks Between People and Information
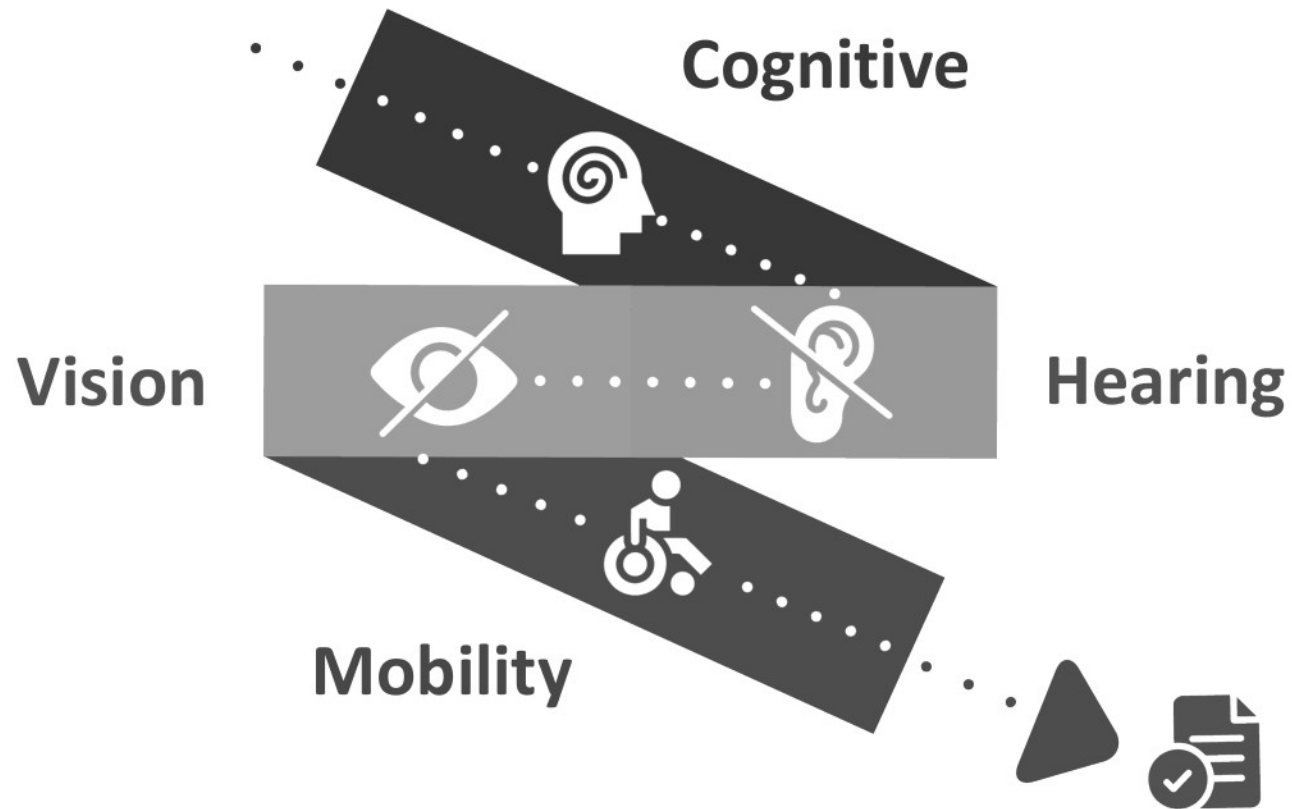
Cognitive

Vision

Hearing

Mobility

Where Do You Come In?

Be a Part of the Solution!

Conception

You Are Here!

Creation

Dissemination

Consumption

DISCOVER

Ways to Integrate Accessibility into Your Workflow

General Accessibility Best Practices

Always include alt text for figures that convey meaning

Color should never be used as the only differentiator

Check that text passes color contrast test using <u>webaim.org</u>

Ensure tables are reserved for data with no blank/merged cells

Set line spacing instead of using hard returns

Stop underlining text that isn't a URL/hyperlink
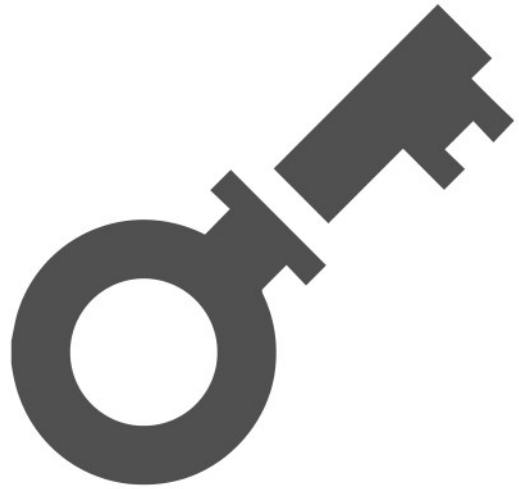
EXPLORE
ITAP's Resources

How ITAP Can Help You:

Explore Our Resources!

1 **Visit ITAP's connectED site:**
https://connected.ed.gov/itap/SitePages/default.aspx

2 **Reach out to our Help Desk:**
ITAPSupport@ed.gov

3 **Check out self-paced resources**:
508.gov Training Videos

4 Lookout for **future ITAP-sponsored trainings**

THANK YOU!

Dignity & Respect Campaign

30 Tips of Dignity & Respect

Making our world a better place for ALL to live—with ALL of our differences.

30 Tips of Dignity & Respect

Practice the Tips!

Sometimes it's the smallest things that have the biggest impact. By practicing one of the 30 Tips of Dignity & Respect every day, each of us can make our world a better place for ALL to live—with ALL of our differences.

TIP 1 **Start with you.** Reflect on how you see others, and how others see you.	**TIP 2** **Sweat the small stuff.** It's often the small things, such as being kind and courteous, that make a difference.	**TIP 3** **Smile.** A smile can be contagious.	**TIP 4** **Say "Hello."** You could make someone's day.	**TIP 5** **Say "Thank you."** Gratitude is a gift that's never too small to give.	**TIP 6** **Treat others the way _they_ want to be treated.** Find out what respect means to others.
TIP 7 **Build cultural awareness.** Differences are barriers only if we allow them to be.	**TIP 8** **Make a new friend.** Start a conversation and learn something new.	**TIP 9** **Demonstrate mutual respect.** Inclusion means being respectful regardless of position or title.	**TIP 10** **Ask.** It's ok to ask when you're not sure.	**TIP 11** **Find common ground.** Discover what you have in common.	**TIP 12** **Communicate respectfully.** It's not just what you say, but how you say it.
TIP 13 **Practice patience.** Take the time to get the full story.	**TIP 14** **Seek understanding.** It's better to not fully understand than to fully misunderstand.	**TIP 15** **Share your point of view.** Everyone has a perspective. Let others benefit from yours.	**TIP 16** **Get someone else's point of view.** After sharing your perspective, give others a chance to share theirs.	**TIP 17** **Reinvent the wheel.** Do something that hasn't already been done.	**TIP 18** **Be open.** Try to experience new thoughts and ideas as learning opportunities.
TIP 19 **Be flexible.** Things don't always go as planned. Adapt to changing conditions when necessary.	**TIP 20** **Join the team.** Do your part to support teamwork.	**TIP 21** **Be a relationship builder.** Seek ways to expand your network.	**TIP 22** **Build trust.** Be fair. Limit bias and favoritism.	**TIP 23** **Lead the way.** Let your inclusive behavior light a path for others.	**TIP 24** **Listen.** People feel respected when they know you're listening to their point of view.
TIP 25 **Remember, we all make mistakes.** Resist the urge to point out the ones others make.	**TIP 26** **Do the right thing.** Make a difference. Get caught being good.	**TIP 27** **Become a mentor.** You—yes, you—can help others realize their potential.	**TIP 28** **Lend a hand.** A little help can go a long way.	**TIP 29** **Live a healthy life.** Do something good for your mind, body, & soul. Encourage others to join you.	**TIP 30** **Be a champion of dignity and respect.** Demonstrate respect for self, others, and your community.

SPEED OF TRUST

FOUNDATIONS

FranklinCovey

THE ULTIMATE COMPETITIVE ADVANTAGE

VERSION 3.0

SPEED OF *EED* TRUST®

FranklinCovey®
THE ULTIMATE COMPETITIVE ADVANTAGE

ABOUT FRANKLINCOVEY

FranklinCovey is a global company specializing in performance improvement.

We help organizations achieve results that require a change in human behavior. Our expertise is in seven areas: Leadership, Execution, Productivity, Trust, Sales Performance, Customer Loyalty, and Education.

For FranklinCovey All Access Pass® inquiries, call 855-711-CARE (2273). Product and program catalogs can be requested by calling 888-868-1776 in the United States or by contacting your local representative outside the United States.

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*SP*of*EED*
TRUST®

PARTICIPANT GUIDE

Name

FranklinCovey®
THE ULTIMATE COMPETITIVE ADVANTAGE

THE CASE
FOR TRUST

"The ability to develop, restore, and extend trust is the key competency of the global economy."

STEPHEN M. R. COVEY
The Speed of Trust

Trust Defined

? Who do you trust in general?

Who would you trust to do your job at work while you are on vacation?

Who would you trust with your PIN—your personal identification number?

Who would you trust with your child or pet?

Who would trust you?

WHAT IS TRUST?

Trust is both a noun and a verb and can have several meanings. Our definition: "Confidence born of the character and the competence of a person or an organization." The opposite of trust is suspicion.

"What is trust? I could give a dictionary definition, but you know it when you feel it."

JACK WELCH
Former CEO, General Electric

What's in It for You?

Outcomes

- **THE CASE FOR TRUST**—Build your own case for trust.
- **SELF TRUST**—Increase your personal credibility.
- **RELATIONSHIP TRUST**—Behave in ways that inspire trust.

Process Map

PREPARE	LEARN AND PRACTICE	APPLY AND SUSTAIN
Pre-work	The *Speed of Trust* work session	• *Speed of Trust* Action Cards • *Speed of Trust* Talks • Trust Action Plans • *Speed of Trust* Digital Coach app • Peer Accountability Process
	YOU ARE HERE	

Video Debrief: *The Speed of Trust*

1. How does trust affect speed and cost?

2. How does your view of the world change when you are aware of the economics of trust?

3. How does trust affect you, your team, or your organization?

The Hidden Variable

S x E = R

Strategy x Execution = Results

(S x E) ＿＿ = R

(Strategy x Execution) ＿＿ = Results

"Trust is like the air we breathe. When it's present, no one really notices. When it's absent, everyone notices."

WARREN BUFFETT
Investor, philanthropist

Trust Taxes and Dividends

TRUST ↓ = SPEED ↓ COST ↑ **TRUST TAX**

TRUST ↑ = SPEED ↑ COST ↓ **TRUST DIVIDEND**
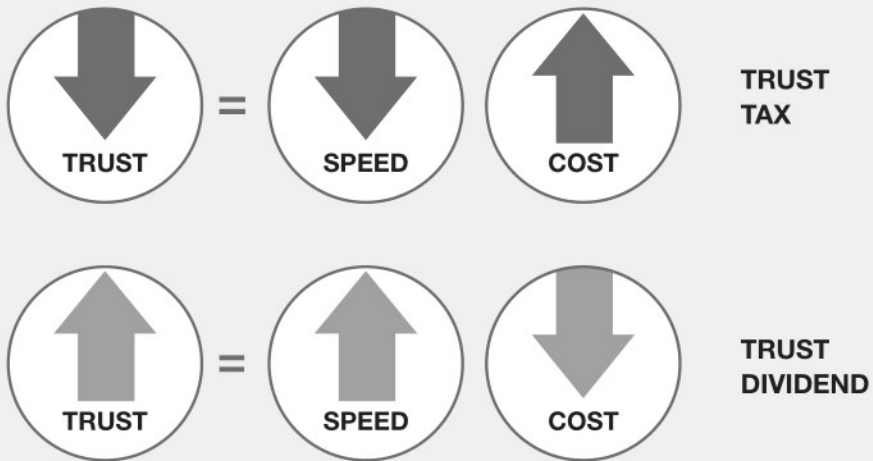
THE 7 ORGANIZATIONAL TRUST TAXES

- Redundancy
- Bureaucracy
- Politics
- Disengagement
- Turnover
- Customer churn
- Fraud

THE 7 ORGANIZATIONAL TRUST DIVIDENDS

- Increased stakeholder value
- Accelerated growth
- Enhanced innovation
- Improved collaboration
- Stronger partnering
- Better execution
- Heightened loyalty

"All organizations are perfectly aligned to get the results they get."

ARTHUR W. JONES
Organizational-design expert

"All organizations are perfectly aligned to get the *level of trust* they get."

STEPHEN M. R. COVEY

7

My Case for Trust

1. Make a list of Trust Taxes you could be experiencing in your team or organization.

2. Choose one Trust Tax and describe the behaviors you see in your day-to-day work that would indicate it is a tax.

3. How do these behaviors affect the speed and cost of your daily work, your major initiatives, your projects, etc.?

My Case for Trust—Example

1. Make a list of Trust Taxes you could be experiencing in your team or organization.
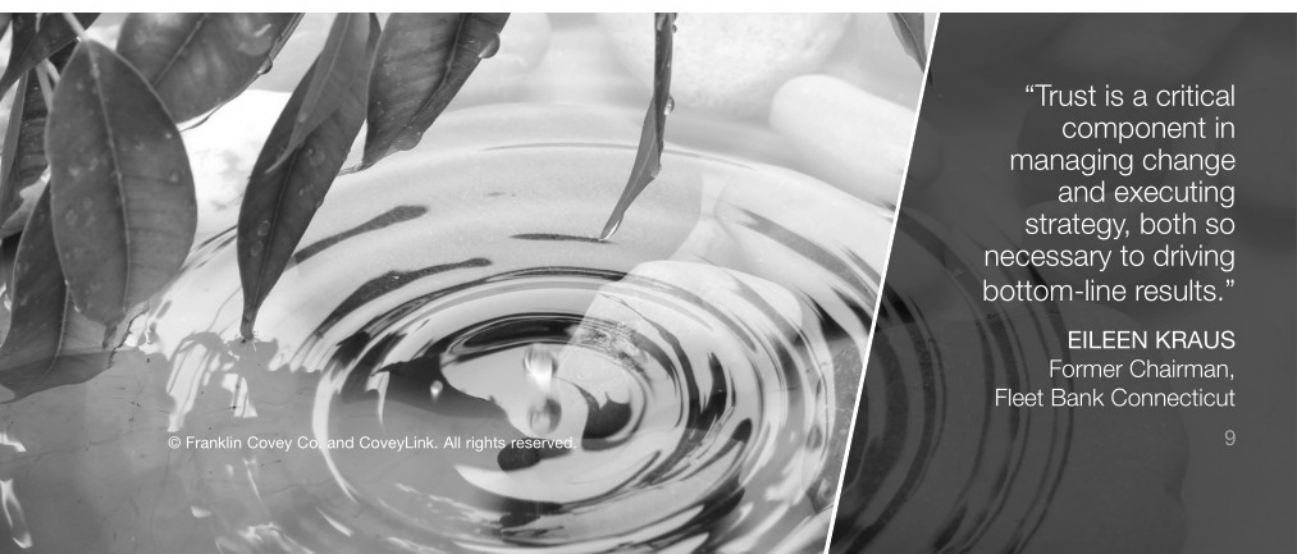
    Lack of communication, disengagement, team apathy, lack of accountability, side meetings after meetings, missed assignments.

2. Choose one Trust Tax and describe the behaviors you see in your day-to-day work that would indicate it is a tax.

    The lack of communication on our team affects everything, including time and trust. For example, when a meeting is cancelled and some people aren't notified, it wastes time and causes upset.

3. How do these behaviors affect the speed and cost of your daily work, your major initiatives, your projects, etc.?

    Everything takes longer to get done. Some of our team members don't understand what they're doing. Team members miss deadlines. (We missed our last product launch by three months, which created a 14 percent revenue loss.) Two colleagues left last month, and my workload has almost doubled.

"Trust is a critical component in managing change and executing strategy, both so necessary to driving bottom-line results."

EILEEN KRAUS
Former Chairman,
Fleet Bank Connecticut

Your Circle of Influence
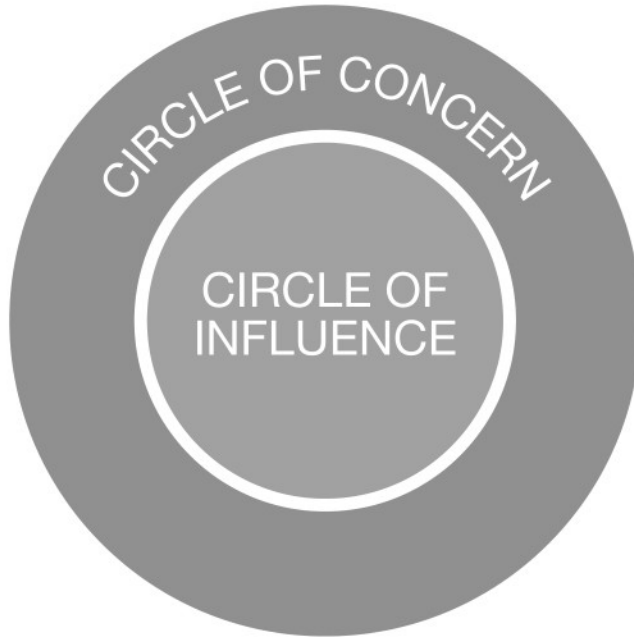
NOTES

"You may not be able to control everything, but you can influence certain things. Trust starts with you."

STEPHEN M. R. COVEY

Video Debrief: *See-Speak-Behave*

1. How is the feeling of trust related to the action of trust?

2. Why are the three dimensions of trust interdependent?

See-Speak-Behave

1. **SEE** the pervasive impact of trust everywhere. Look for it. Recognize it. Consider its impact.

2. **SPEAK** the language of trust. Talk trust. Speak to and about people in ways that increase trust. Make establishing trust an explicit objective.

3. **BEHAVE** in ways that inspire trust. Develop, restore, and extend Smart Trust. Earn the dividends of high trust.

SEE

SPEAK

BEHAVE

"These three dimensions are interdependent, and whenever you effect a change in one dimension, you effect a change in all three."

STEPHEN M. R. COVEY

The 5 Waves of Trust

SELF TRUST
RELATIONSHIP TRUST
ORGANIZATIONAL TRUST
MARKET TRUST
SOCIETAL TRUST

"Like a drop of water in a pond, your personal credibility has a ripple effect on your relationships, team, organization, and market—even on society."

STEPHEN M. R. COVEY

SELF TRUST

THE PRINCIPLE OF CREDIBILITY

___

"Leadership may have to come in a different package. It's got to be credible…. Overall, it's about credibility, walking the talk."

ANNE MULCAHY
Former CEO, Xerox

Strengthening Your
4 Cores of Credibility

SELF TRUST

RELATIONSHIP TRUST

ORGANIZATIONAL TRUST

MARKET TRUST

SOCIETAL TRUST

"Self Trust is all
about two things:
Do I trust myself?
Do I give others a
person they can
trust?"

STEPHEN M. R. COVEY

Video Debrief: *Self Trust*

1. What are the four elements of Self Trust?

2. Why are both character and competence important?

3. What Trust Dividends did Andy Roddick earn?

4. What made Fiona Wood the "most trusted citizen" in her country?

The 4 Cores
of Credibility

RESULTS (4)

CAPABILITIES (3)

The 4 Cores
of Credibility

INTENT (2)

INTEGRITY (1)
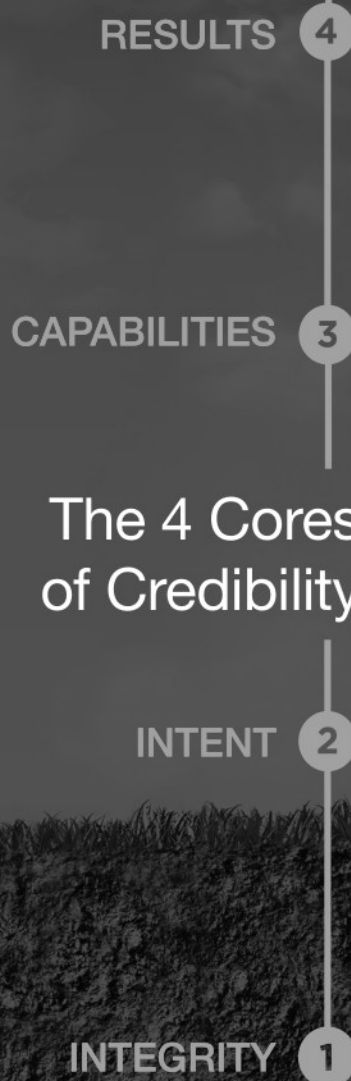
COMPETENCE

CHARACTER

19

The 4 Cores of Credibility

Review each of the 4 Cores of Credibility Cards. Discuss how character and competence affect your personal credibility and how they impact your ability to behave in high-trust ways.

CHARACTER

1 ## Integrity
Are You Congruent?

2 ## Intent
What's Your Agenda?

COMPETENCE

3 Capabilities
Are You Relevant?

4 Results
What's Your Track Record?

Video Debrief: *Credibility*

1. Which of the 4 Cores of Credibility did you observe?

2. What is the long-term impact of your credibility on others?

"Self Trust begins with each of us personally. It's an 'inside out' approach: to build trust with others, we must first start with ourselves."

STEPHEN M. R. COVEY

Who Do You Know?

Identify people you know who are good examples of each of the 4 Cores of Credibility. Describe the qualities of the people you identified.

CHARACTER

1 ## Integrity
Congruency in values, beliefs, and behavior. Deep honesty. Humility and courage.

Who do you know, and how would you describe them?

2 ## Intent
Genuine concern and caring for others. Fundamental motive or agenda. Seeking mutual benefit. Acting in the best interests of everyone.

Who do you know, and how would you describe them?

COMPETENCE

③ Capabilities

The capacities we have to produce and accomplish tasks: talents, attitudes, skills, knowledge, and style.

Who do you know, and how would you describe them?

④ Results

Our track record—past, present, and anticipated. Getting the right things done while avoiding Trust Taxes and reaping Trust Dividends.

Who do you know, and how would you describe them?

The 4 Cores of Credibility: Self-Assessment

Circle the numbers on the self-assessment that best describe you. Add the scores for each section, then enter the sum of all four sections at the end of the assessment.

SECTION 1		
I sometimes justify telling "white lies," misrepresent people or situations, or "spin" the truth to get the results I want.	① ② ③ ④ ⑤	At every level, I am thoroughly honest in my interactions with others.
At times there's a mismatch between what I think and what I say, or between my actions and my values.	① ② ③ ④ ⑤	What I say and do is what I really think and feel; I consistently "walk my talk."
I am not fully clear on my values. It's difficult for me to stand up for something when others disagree.	① ② ③ ④ ⑤	I am clear on my values and courageous in standing up for them.
It's hard for me to acknowledge that someone else may be right, or that there is additional information out there that may cause me to change my mind.	① ② ③ ④ ⑤	I am genuinely open to the possibility of learning new things that may cause me to rethink issues or even redefine values.
I have a difficult time setting and achieving personal goals or commitments.	① ② ③ ④ ⑤	I am able to consistently make and keep commitments to myself and others.
	SECTION SCORE	

SECTION 2		
I don't really care that much about people, except those closest to me. It's hard for me to think about concerns outside of my own challenges in life.	① ② ③ ④ ⑤	I genuinely care about other people and am deeply concerned about the well-being of others.
I don't think a lot about why I do what I do. I've rarely, if ever, tried to do deep interior work to improve my motives.	① ② ③ ④ ⑤	I am consciously aware of my motives and I refine them to make sure I'm doing the right things for the right reasons.
In my dealings with others, I usually focus on getting what I want.	① ② ③ ④ ⑤	I actively seek solutions that provide a "win" for everyone involved.
Based on my behavior, most people wouldn't necessarily think I had their best interest in mind.	① ② ③ ④ ⑤	Other people can clearly tell by the things I do that I really do have their best interest in mind.
Deep down, I believe that if someone else gets something— resources, opportunities, credit—it means I don't.	① ② ③ ④ ⑤	I sincerely believe that there is more than enough of everything to go around.
SECTION SCORE		

SECTION 3

I feel like I'm not really utilizing my talents in my current job.	① ② ③ ④ ⑤	There is a high match between my talents and opportunities in the work I'm doing.
I have not gained the knowledge or fully developed the skills I need to be really effective at work.	① ② ③ ④ ⑤	I have acquired the knowledge and mastered the skills required for my job.
I seldom take time to improve my knowledge and skills at work or in any other area of my life.	① ② ③ ④ ⑤	I relentlessly update and increase my knowledge and skills in all the important areas of my life.
I'm not really sure what my strengths are; I'm more focused on trying to improve in my areas of weakness.	① ② ③ ④ ⑤	I've identified my strengths, and my greatest focus is on using them effectively.
At this point, I really don't know much about how to build trust.	① ② ③ ④ ⑤	I know how to effectively establish, grow, extend, and restore trust, and I consciously work to make it happen.
	SECTION SCORE	

SECTION 4

I don't have a very good track record. My résumé certainly won't knock anyone's socks off.	① ② ③ ④ ⑤	My track record clearly gives others the confidence that I will achieve desired results.
I focus my efforts on doing what I've been told to do.	① ② ③ ④ ⑤	I focus my efforts on delivering results, not activities.
When it comes to communicating my track record, either I don't say anything (I don't want to brag), or I say too much and turn people off.	① ② ③ ④ ⑤	I apporopriately communicate my track record to others in a way that inspires confidence.
I often fail to finish what I start.	① ② ③ ④ ⑤	With rare exception, if I start something, I finish it.
I don't worry as much about how I get results—just that I get them.	① ② ③ ④ ⑤	I consistently get results in ways that inspire trust.

SECTION SCORE	
Integrity (Section 1)	
Intent (Section 2)	
Capabilities (Section 3)	
Results (Section 4)	
TOTAL	/100

Compare Your Scores

Take the assessment again from the perspective of your immediate supervisor. Underline—rather than circle—the number you think she or he would use to describe you.

1. How do you and your immediate supervisor view your 4 Cores of Credibility differently?

2. What might be the reasons for the differing points of view?

3. What one or two actions will you take to close the gap between how you and your supervisor view your 4 Cores of Credibility? ⊗

"Great minds discuss ideas, average minds discuss events, small minds discuss people."

ELEANOR ROOSEVELT

My Credibility Manifesto

I can be trusted because...

"Trust yourself. Create the kind of self that you will be happy to live with all your life."

GOLDA MEIR
Former Israeli Prime Minister

Accelerators

When you build the 4 Cores of Credibility, you give others around you a person they can trust. On the back of each of the 4 Cores of Credibility Cards are three Accelerators—pointers that guide you in how to strengthen each core. As you use the Accelerators, you will improve your personal credibility and ultimately increase the speed and lower the cost in everything you do.
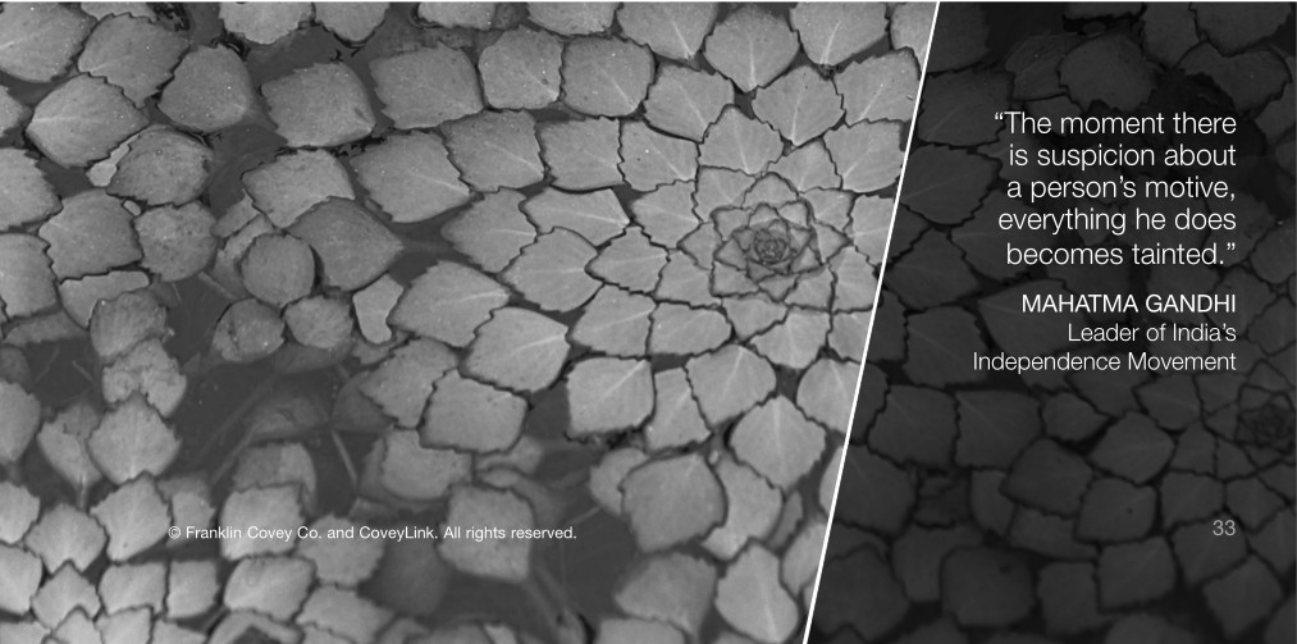
Integrity Accelerators
Increasing Your Integrity

1. **Make and Keep Commitments to Yourself.**
   Treat commitments to yo
   would treat commitments
   important people in your
   keep, repeat.

2. **Stand for Something.**
   Write a mission statemen
   credo—an expression of
   for. Then live by it.

3. **Be Open.**
   Exercise humility. Challen
   see the world: Are your c
   totally accurate and com
   seriously consider other

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Intent Accelerators
Improving Your Intent

1. **Examine Your Motives.**
   Ask yourself the "five whys
   you get close to your rea
   yourself: "Am I motivated
   interest or by the interest

2. **Choose Abundance.**
   Ask yourself: "Do I believ
   enough rewards, credit, r
   benefits for everyone's in
   served?"

3. **Declare Your Intent.**
   Choose the intent that w
   everyone best, including
   it, signal it, clarify it, and
   especially when your inte
   Share the "why" behind t
   wherever possible.

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Capabilities Accelerators
Building Your Capabilities

1. **Run With Your Strengths.**
   Feed your strengths. Wha
   Where are your natural ta
   What can you do best? S
   weaknesses by teaming
   are strong where you're

2. **Keep Yourself Relevant**
   Match your strengths to
   Where can you make a u
   value contribution?

3. **Know Where You're Go**
   Specify your distinctive c
   keep the vision of it befo
   now on.

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Results Accelerators
Improving Your Results

1. **Take Responsibility for Results.**
   Adopt a "results" mindset rather than
   an "activity" mindset. Ask yourself: "Will
   what I'm doing now lead to the results I
   want, or am I just staying busy?"

2. **Expect to Win.**
   Openly express confidence in yourself
   and others. Clearly define what winning
   consists of. Create an emotional climate
   of high expectations.

3. **Finish Strong.**
   Drop out of the "culture of quitting" and
   the "victim mentality." Stay strong at the
   end when everything's on the line.

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Declare Your Intent

When you begin a conversation, share the "why" behind the "what" whenever possible. Choose the intent that will serve everyone best—including yourself.

1. What does "declare your intent" mean?

2. What is the value of declaring your intent?

3. When is it best to declare your intent?

> "The moment there is suspicion about a person's motive, everything he does becomes tainted."
>
> **MAHATMA GANDHI**
> Leader of India's
> Independence Movement

Trust Action Plan (TAP)

Use this tool individually or with a group to decide what action to take to inspire trust in a given situation.

DESIRED OUTCOME

Declare your intent by describing your outcomes as specifically as possible.

I want my fellow team members to know that I stand for honesty and that they can always count on me to be straight with them.

CURRENT SITUATION

Confront reality by describing the situation clearly and factually.

Based on input from my peers, I think my team is clear about my ability to do my job. What they are unsure of is my dedication to being completely honest and open with them when we are working together on projects.

ACTION PLAN

Identify key actions you will take and behaviors you will model to close the gap between the situation and the outcome. Use the Trust Action Cards as a resource.

Improve Integrity: I want my word to define who I am, but my peers don't see me as direct or completely open with them. I need to listen to them carefully and integrate their feedback into the things I do each day. I commit to be very careful with giving my word in the future, and when I give it, I will honor it fully.

Trust Action Plan (TAP)

Use this tool individually or with a group to decide what action to take to inspire trust in a given situation.

DESIRED OUTCOME

Declare your intent by describing your outcomes as specifically as possible.

I want my siblings to know that I value each one of them and that I want to support them in all they do.

CURRENT SITUATION

Confront reality by describing the situation clearly and factually.

Based on several bits of feedback I have gotten from my siblings, it is important to them that I support them, even though they are very different from me. They want to know that I support them in the things they care deeply about and the things they put their energy and effort into. They have expressed that I am currently not providing this support.

ACTION PLAN

Identify key actions you will take and behaviors you will model to close the gap between the situation and the outcome. Use the Trust Action Cards as a resource.

Improve Intent: I need to take a hard look at myself as a sibling. I thought that I was being supportive of them, but it seems they feel I support them only in things that align with my own values. I will take time to listen to what is important to them to be sure I've got it right. I will let them know clearly that I intend to support them.

Trust Action Plan (TAP)

Use this tool individually or with a group to decide what action to take to inspire trust in a given situation.

DESIRED OUTCOME

Declare your intent by describing your outcomes as specifically as possible.

CURRENT SITUATION

Confront reality by describing the situation clearly and factually.

ACTION PLAN

Identify key actions you will take and behaviors you will model to close the gap between the situation and the outcome. Use the Trust Action Cards as a resource.

NOTES

Peer Accountability Process

Having regularly scheduled meetings with a partner can help keep you accountable to the things you've learned.

1. Meet with your Peer Accountability Partner.

2. Share insights from your Self Trust Action Plan.

3. Schedule your first accountability meeting. ⊙

Date:	Time:
Place:	

NOTES

RELATIONSHIP
TRUST

THE PRINCIPLE OF BEHAVIOR

"The only relationships in this world that have ever been worthwhile and enduring have been those in which one person could trust another."

SAMUEL SMILES
British author and biographer

Using the 13 Behaviors to Develop, Restore, and Extend Trust in Your Key Relationships

SELF TRUST

RELATIONSHIP TRUST

ORGANIZATIONAL TRUST

MARKET TRUST

SOCIETAL TRUST

"It is better to trust and be disappointed once in a while than it is to distrust and be miserable all the time."

ABRAHAM LINCOLN

Relationship Trust

Think of a person at work with whom you have a *high-trust* relationship.

- What is it like to work with this person?
- How long does it take to get things done?
- What is communication like?
- What kind of results are you able to achieve?

Think of a person with whom you have a *low-trust* relationship.

- What is it like to work with this person?
- How long does it take to get things done?
- What is communication like?
- What kind of results are you able to achieve?

Video Debrief: *Relationship Trust*

1. What can you DO to develop trusting relationships?

2. What is a Trust Account?

"What you do speaks more loudly than what you say."

QUAKER PROVERB

The 13 Behaviors of High Trust

1 **Talk Straight**
Tell the truth and demonstrate integrity.

2 **Demonstrate Respect**
Show that you genuinely care; show kindness in little things.

3 **Create Transparency**
Be genuine, open, and authentic. Don't hide information.

4 **Right Wrongs**
Apologize and make restitution. Do the right thing.

5 **Show Loyalty**
Give credit to others and be loyal to the absent.

6 **Deliver Results**
Accomplish what you are hired to do. Don't make excuses.

7 **Get Better**
Learn and improve. Be thankful for feedback and act upon it.

8 **Confront Reality**
Meet issues head on; address the tough stuff directly.

9 **Clarify Expectations**
Reveal, discuss, and validate expectations.

10 **Practice Accountability**
Take responsibility for results; communicate how others are doing.

11 **Listen First**
Listen before you speak and don't make assumptions.

12 **Keep Commitments**
State your intent and then do what you say you'll do. Don't break confidences.

13 **Extend Trust**
Don't withhold trust because risk is involved.

Counterfeit Behavior

COUNTERFEIT BEHAVIOR IS WHAT DEFINES A LOW-TRUST CULTURE.

HIGH-TRUST BEHAVIOR

COUNTERFEIT ZONE

OPPOSITE BEHAVIOR

"Counterfeits are particularly
dangerous because although
the opposites are self-evident,
Counterfeit Behaviors—like
counterfeit money—appear to be
real, but on closer inspection reveal
themselves as disingenuous."

STEPHEN M. R. COVEY

NOTES

The 13 Behaviors: Self-Assessment

Give yourself a 1 if you are most like the statement on the left. Give yourself a 5 if you are most like the statement on the right. Give yourself a 2, 3, or 4 depending on where you "lean." Answer the questions at the end of the assessment.

COUNTERFEIT		HIGH TRUST
Technically tell the truth, but leave the wrong impression—"spin" or manipulate.	**Talk Straight** ① ② ③ ④ ⑤	Be honest. Tell the truth. Don't spin the truth.
Fake respect or concern.	**Demonstrate Respect** ① ② ③ ④ ⑤	Genuinely care for others. Show you care. Show kindness in the little things.
Make things appear different than they are. Withhold information.	**Create Transparency** ① ② ③ ④ ⑤	Tell the truth in a way people can verify for themselves. Declare your intent.
Justify, disguise, or try to hide mistakes instead of repairing them.	**Right Wrongs** ① ② ③ ④ ⑤	Make things right when you're wrong. Apologize quickly. Make restitution where possible.
"Sweet-talk" people when they are present, but talk negatively about them when they aren't.	**Show Loyalty** ① ② ③ ④ ⑤	Give credit to others. Represent others who aren't there to speak for themselves.
Deliver activities (busywork) instead of results (real work), or perform poorly.	**Deliver Results** ① ② ③ ④ ⑤	Establish a track record of results. Make things happen. Don't make excuses.
Learn but never produce. Force-fit everything into what you're good at doing—and become irrelevant.	**Get Better** ① ② ③ ④ ⑤	Improve. Be a constant learner. Act on feedback you receive.

COUNTERFEIT		HIGH TRUST
Pretend to confront reality, but actually evade it or deny it.	**Confront Reality** ① ② ③ ④ ⑤	Take issues head on. Address the tough stuff directly. Confront issues before they turn into problems.
Fail to define results, deadlines, or resources that facilitate accountability.	**Clarify Expectations** ① ② ③ ④ ⑤	Reveal expectations—don't assume they are clear or shared. Discuss them.
Point fingers and blame others. Fail to enforce consequences when expectations are not met.	**Practice Accountability** ① ② ③ ④ ⑤	Hold yourself accountable. Hold others accountable. Don't blame others when things go wrong.
Pretend to listen or listen only to formulate your reply—not to understand.	**Listen First** ① ② ③ ④ ⑤	Listen before you speak. Diagnose. Don't presume you have all the answers.
Make vague, elusive commitments so you can't be pinned down.	**Keep Commitments** ① ② ③ ④ ⑤	Say what you will do, then do what you say. Don't break commitments or confidences.
Act like you trust someone, but micromanage her or his efforts. Give people responsibility, but no authority or resources.	**Extend Trust** ① ② ③ ④ ⑤	Extend trust abundantly to those who have earned your trust. Learn Smart Trust based on the situation. Don't withhold trust because of risk.

1. Which two or three behaviors scored the highest?

2. Which two or three behaviors scored the lowest?

3. What one to two actions will you take to improve one of the lowest-scoring behaviors?⊗

⊗ See "My Commitments," p. 66

Which Behaviors?

Use the Trust Action Cards to determine what to do and say in the following scenarios.

1. You did not follow through on an important commitment to another team last week. Someone has complained, and now your boss has contacted you about it. What will you do and say?

2. Your boss has a problem trusting others, including you, to work without his close supervision. He constantly looks over your shoulder, gives unsolicited advice, listens in on your calls, and reverses a lot of your decisions. You spend half your time responding to his "keep me in the loop" emails. What will you say and do to help him extend more trust to you?

3. One of your co-workers talks down about you to your boss and colleagues, saying that you do everything wrong and making it look like you don't know what you're doing. He has been with the company a long time, so he has the "voice of experience" going for him. Some things your boss has said to you leave you wondering if she might believe these complaints. You have a meeting scheduled with your boss. What will you say to her to bolster her trust in you?

The Trust Action Cards Index includes common trust challenges and suggested Behavior Cards to address each challenge. Use these cards to help you develop, restore, and extend trust at work and home.

Trust Action Cards Index

Use the Trust Action Cards to meet the following typical trust issues at work. Remember, always start with yourself by checking the 4 Cores of Credibility Cards.

What do I do when...	13 Behaviors Trust Action Cards
The boss doesn't trust me?	6 / 7 / 9 / 10 / 11
I don't trust the boss?	2 8 9 10
I make a mistake that affects other people?	1 / 3 / 4
A co-worker has let me down?	1 2 9 11 13
I'm not going to be able to meet a deadline?	4 / 6 / 7 / 8
My boss thinks I'm not delivering?	1 4 6 9 11
Customers are let down?	4 / 7 / 12
There's bad publicity?	3 4 8
I need to build trust with my co-workers?	2 / 3 / 5 / 6 / 12

Trust Action Cards Index

What do I do when...	13 Behaviors Trust Action Cards
I need to restore trust in a damaged relationship?	2 / 4 / 10 / 12
I want to gain the trust of someone older?	2 6 7 11
I want to gain the trust of someone younger?	2 / 3 / 5 / 13
I can't get needed resources?	3 9 10
Someone is undermining me at work?	2 / 3 / 8
People around me start talking about someone else?	2 5 8
I'm not sure what others expect from me?	3 9 10 11
People won't talk about important issues?	1 2 3 8
I feel misunderstood?	1 / 3 / 11
I'm having problems with a co-worker?	1 2 5 11

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Trust Action Cards Index

What do I do when...	13 Behaviors Trust Action Cards
I'm feeling overwhelmed at work?	3 / 8 / 9
I become aware that illegal/dishonest things are going on?	1 3 4 8 10
I need to delegate a task to someone?	9 / 10 / 13
I need to hold others accountable?	1 2 10 12
I need to negotiate an agreement with someone?	1 / 2 / 9 / 11 / 12
I want to motivate others to do their best?	5 9 10 13
Someone isn't performing?	1 / 8 / 9 / 11 / 13
I have to let someone go?	1 2 5 8
Someone fails to keep an important commitment?	1 / 2 / 8 / 11
Someone takes credit for something I did?	1 2 3

Trust Action Cards Index

What do I do when...	13 Behaviors Trust Action Cards
We overpromise something to a customer?	1 / 3 / 4 / 9 / 12
I feel someone has been promoted or rewarded unfairly?	1 2 5 9
Cynicism is building up because of a lack of trust?	1 / 3 / 5 / 8 / 12
I'm tempted to cover up a mistake?	1 3 4 12
I get blamed for something that is not my fault?	1 / 3 / 9 / 10 / 12
I feel offended?	1 2 5 11
Our team suffers from a credibility problem?	3 4 6 7
A customer is being unreasonable?	9 11 12
I lack confidence in a co-worker?	1 / 5 / 9 / 13

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The Sweet Spot

Like any good thing, it's possible to take any of the 13 Behaviors to the extreme. Any strength pushed to the extreme becomes a weakness. Keep the following visual in mind as you apply the 13 Behaviors.

TOO LITTLE	SWEET SPOT	TOO MUCH
WEAKNESS	STRENGTH	WEAKNESS

13 BEHAVIORS TIPS

- It's inside out. If you're weak on the 4 Cores of Credibility, you'll never succeed with the 13 Behaviors.

- Sequence matters. Some of the 13 Behaviors naturally come before others.

- The 13 Behaviors are always used in combination.

- Any of the 13 Behaviors taken to the extreme can backfire.

1 Talk Straight

Be honest. Tell the truth. Let people know where you stand. Use simple language. Call things what they are. Demonstrate integrity. Don't manipulate people or distort facts. Don't spin the truth. Don't leave false impressions.

OPPOSITE

To lie or deceive.

Speed of Trust ACTION CARDS
www.speedoftrust.com

2 Demonstrate Respect

Show you care. ...ry person and ...with respect, ...do anything for ...little things. Don't ...o be "efficient"

...other

3 ...Transparency

...ople can verify for ...intent. Get real and ...authentic. Err on ...ransparent about ...arent (e.g., the ...erate on the ...what you get." ...Don't hide

Speed of Trust Talks

"DEVELOP TRUST" TALK

An effective leader begins relationships on the right foot and takes existing relationships to the next level.

"RESTORE TRUST" TALK

Even people who have the best intentions will bump into each other from time to time, and conflict will arise. It is a leader's responsibility to go first and restore trust.

"EXTEND SMART TRUST" TALK

Assess your propensity to trust and then assess the risks involved in every situation in which you need to extend trust.
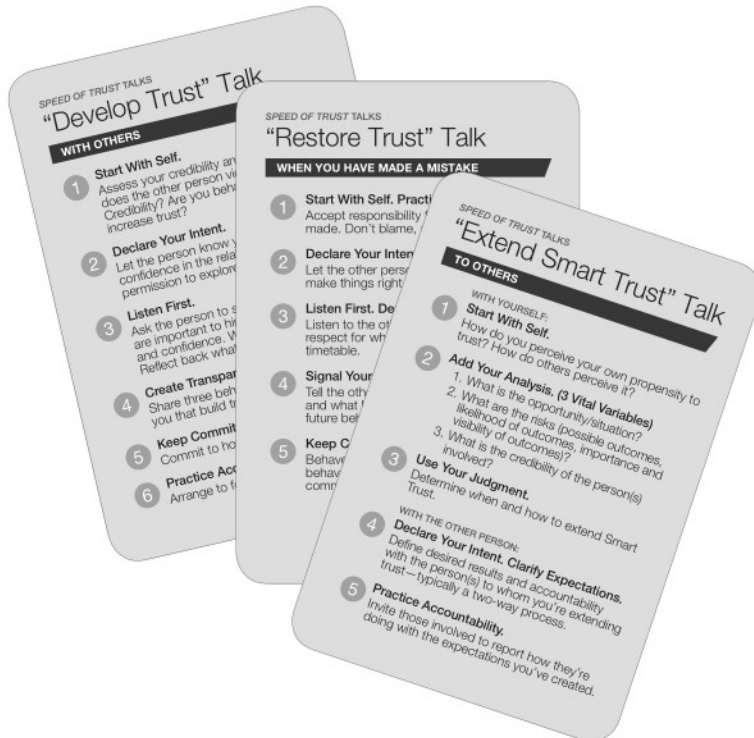
"Develop Trust" Talk

1 **Start With Self.**
Assess your own credibility and behavior before the talk.

2 **Declare Your Intent.**
"It's important to me that we have a high level of confidence in our working relationship. I'm sure there are things we can do to increase that level, and I'd like to talk with you about it for a few minutes. Is that okay?"

3 **Listen First.**
"Share with me three behaviors that are important to you that build trust and confidence." (Wait for response.)

"Of these three behaviors, which one is most important to you?" (Wait for response.)

"When people don't _____ (insert behavior), what does it look like? What would it look or sound like if people did _____ (insert behavior)?" (Wait for response, then reflect back to ensure understanding.)

4 **Create Transparency.**
"Is it all right if I share some behaviors that are important to me?"

5 **Keep Commitments.**
"I will commit to these behaviors you identified. Will you let me know if I get off track?"

6 **Practice Accountability.**
"Can we agree to follow up every two weeks to discuss how we are doing, and to possibly discuss new behaviors?"

With whom and by when will I have a "Develop Trust" Talk?⊙

SPEED OF TRUST TALKS
"Develop Trust" Talk
WITH OTHERS

1 **Start With Self.**
Assess your credibility and behavior. How does the other person view your 4 Cores of Credibility? Are you behaving in ways that increase trust?

2 **Declare Your Intent.**
Let the person know you want high confidence in the relationship. Ask for permission to explore how to do it.

3 **Listen First.**
Ask the person to share three behaviors that are important to him or her that build trust and confidence. Which is most important? Reflect back what you hear.

4 **Create Transparency.**
Share three behaviors that are important to you that build trust and confidence.

5 **Keep Commitments.**
Commit to honor the requested behaviors.

6 **Practice Accountability.**
Arrange to follow up every few weeks.

⊙ See "My Commitments," p. 67

Restore Trust

1. Identify someone with whom you have lost trust.

2. How was trust lost—was it an issue of character, competence, or both?

3. How important is the relationship to you, and how willing are you to restore trust?

"Based on the situation, it may not be possible to restore trust."

STEPHEN M. R. COVEY

Audio Debrief: *Restoring Trust (Part 1)*

1. Do you think trust can be restored in each situation?

2. Which of the 4 Cores of Credibility or 13 Behaviors could help restore trust?

"The best way to find out if you can trust somebody is to trust them."

ERNEST HEMINGWAY

Restore Trust

THREE CONDITIONS

1. The nature of the loss.

2. The importance of the relationship.

3. The willingness of both parties to restore trust.

WHEN YOU HAVE MADE A MISTAKE

Whether you lose trust through an act of betrayal, poor judgment, an honest mistake, or a simple misunderstanding, the path to restoration is the same.

- Strengthen the 4 Cores of Credibility.
- Behave in ways that inspire trust using the 13 Behaviors.

WHEN OTHERS HAVE MADE A MISTAKE

Most mistakes are unintentional; don't make them into something they are not.

- Don't be too quick to judge.
- Do be quick to forgive.

Extend Trust

Think of a person who believed in you, showed confidence in you, and/or extend trust to you.

1. What was the situation or relationship?

2. How did you feel?

3. What is the impact of that situation on you today?

"Because you believed I was capable of behaving decently, I did."

PAULO COELHO

"Smart Trust" Matrix™

	LOW — ANALYSIS — HIGH	
HIGH	1 **Blind Trust** **GULLIBILITY** (Trust Everyone)	2 **Smart Trust** **JUDGMENT** (Trust Wisely)
LOW	3 **No Trust** **INDECISION** (Trust No One)	4 **Distrust** **SUSPICION** (Trust Only Self)

PROPENSITY TO TRUST (vertical axis, LOW to HIGH)

ANALYSIS (horizontal axis, LOW to HIGH)
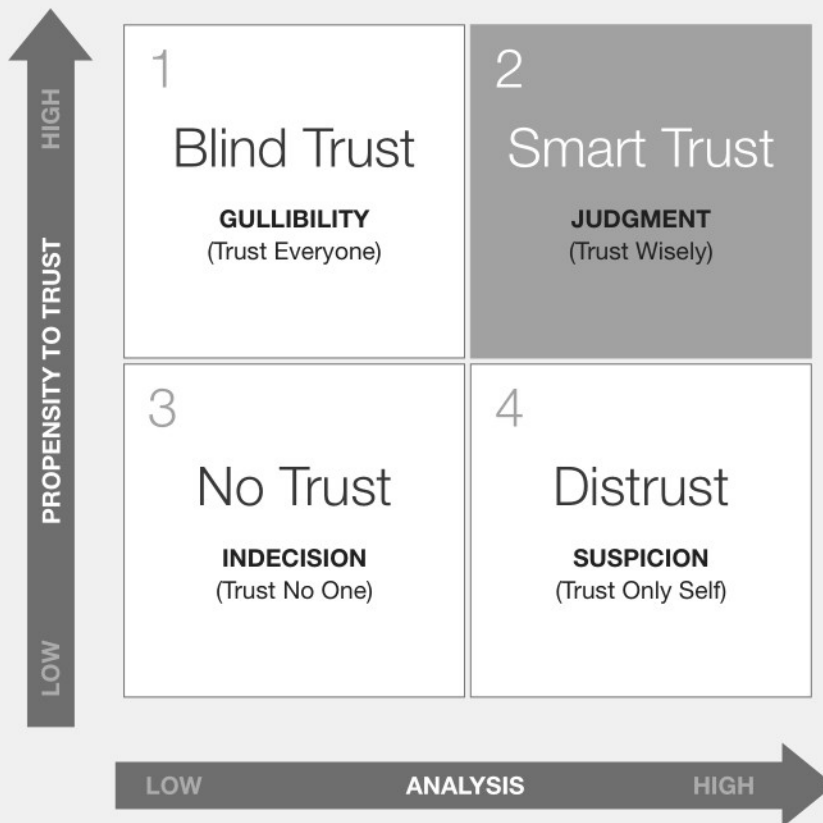
"I have found that by trusting people until they prove themselves unworthy of that trust, a lot more happens."

JAMES E. BURKE
Former CEO, Johnson & Johnson

Extend Smart Trust

Learning how to extend Smart Trust is a function of two factors: propensity to trust and analysis.

PROPENSITY TO TRUST

- Primarily a matter of the heart.
- Your willingness or tendency to trust others.

ANALYSIS

- Primarily a matter of the mind.
- The 3 Vital Variables:
  1. Opportunity.
  2. Risk.
     - Possible outcomes of the situation.
     - Likelihood of outcomes.
     - Importance and visibility of outcomes.
  3. Credibility of the organization or the person(s) involved.

Video Debrief: *Extending Trust*

1. What impact did extending trust have on Jason?

2. What impact did extending trust have on others around him?

"A 10 percent increase in trust inside an organization has the same effect on employee satisfaction as a 36 percent increase in pay."

HELLIWELL AND HUANG

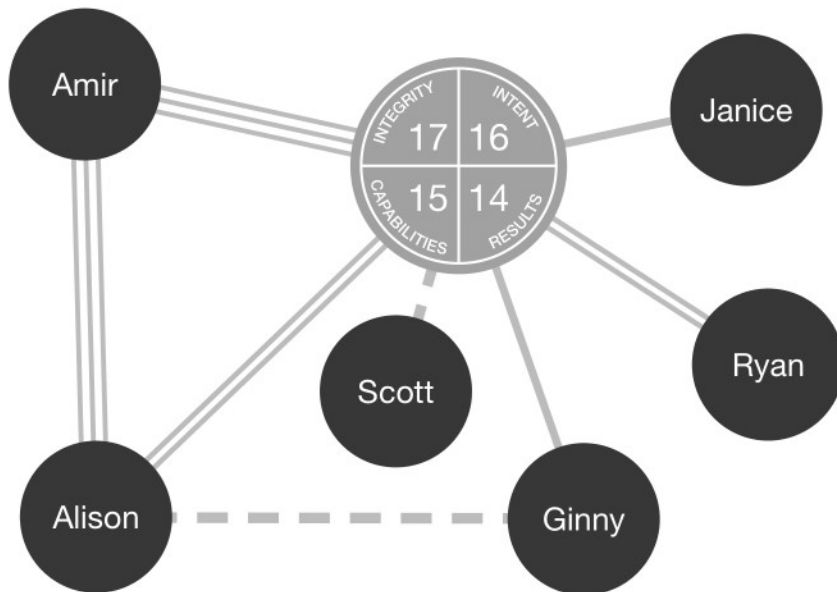# *Speed of Trust* Map Exercise

A *Speed of Trust* Map is a visual depiction of your network of trusting relationships. Create your map using directions from the facilitator.

EXAMPLE

Context _____My Team_____

═══════	"WORLD CLASS" TRUST
══════	GOOD TRUST
───────	AVERAGE OR NEUTRAL TRUST
▬ ▬ ▬	POOR OR DAMAGED TRUST

My 4 Cores of Credibility

Context_____

Trust Action Plan (TAP)

Use this tool individually or with a group to decide what action to take to inspire trust in a given situation.

DESIRED OUTCOME

Declare your intent by describing your outcomes as specifically as possible.

I expect our team to succeed in producing high-quality products we can be proud of and that our customers are overjoyed with.

CURRENT SITUATION

Confront reality by describing the situation clearly and factually.

Based on survey results, our clients are dissatisfied with the products we produced last year. We are a very capable team that is not producing what is expected of us. We must change to meet the growth goals we have set for ourselves.

ACTION PLAN

Identify key actions you will take and behaviors you will model to close the gap between the situation and the outcome. Use the Trust Action Cards as a resource.

Create Transparency: We need an urgent team meeting to talk honestly about customer feedback and sales data.

Talk Straight: Ask two team leaders to gather causes and solutions to share at the meeting.

Get Better: Implement three new mechanisms to get consistent customer feedback, and meet weekly to improve processes.

Trust Action Plan (TAP)

Use this tool individually or with a group to decide what action to take to inspire trust in a given situation.

DESIRED OUTCOME

Declare your intent by describing your outcomes as specifically as possible.

The level of affection and respect will grow between my teenage daughter and me.

CURRENT SITUATION

Confront reality by describing the situation clearly and factually.

At some point, I transitioned from being the world's smartest person to the planet's dumbest person in the eyes of my 13-year-old daughter. Now she is eye-rolling and sighing at my every word and action.

ACTION PLAN

Identify key actions you will take and behaviors you will model to close the gap between the situation and the outcome. Use the Trust Action Cards as a resource.

Demonstrate Respect: I will tell her how much I respect and appreciate her, and I will stand by my word by listening to her from her perspective and really trying to understand her. Show Loyalty: I will acknowledge her good schoolwork and what she does around the house. I will talk to her respectfully, and be sure to speak about others with respect. Confront Reality: I will acknowledge what this experience is like for me—how I feel when she rolls her eyes and sighs. I want to hear how she experiences me, no matter how hard the truth might be for me to hear.

Trust Action Plan (TAP)

Use this tool individually or with a group to decide what action to take to inspire trust in a given situation.

DESIRED OUTCOME

Declare your intent by describing your outcomes as specifically as possible.

CURRENT SITUATION

Confront reality by describing the situation clearly and factually.

ACTION PLAN

Identify key actions you will take and behaviors you will model to close the gap between the situation and the outcome. Use the Trust Action Cards as a resource.

NOTES

1   **SELF TRUST** (The 4 Cores of Credibility)

- What actions will I take to close the gap between how my supervisor and I view my 4 Cores of Credibility (p. 30)?

- When will I start to work on my Self Trust Action Plan (p. 36)?

2   **RELATIONSHIP TRUST** (The 13 Behaviors)

- What actions will I take to improve one of the lowest-scoring behaviors in the 13 Behaviors self-assessment (p. 47)?

- With whom and by when will I have a "Develop Trust" Talk (p. 52)?

- When will I start to work on my Relationship Trust Action Plan (p. 64)?

③ PEER ACCOUNTABILITY PROCESS

Accountability-Partner Information (p. 38)

Name:	**Contact:**

First Meeting:

Peer Accountability Meeting agenda:

1. Report on your successes and challenges.
2. Make commitments to improve.
3. Schedule your next meeting.

NOTES

RESOURCES

Tips for Using the 13 Behaviors

CHARACTER BEHAVIORS

1. **Talk Straight**

   - Become aware of your conversation. In the middle of an interaction, stop and ask yourself, "Am I talking straight, or am I manipulating information?" If you're manipulating information in any way, figure out why. Recognize you're paying a tax for it, and work on Integrity and Intent.

   - Involve other people. Tell them, "I'm really trying to improve my ability to Talk Straight in my communications. Would you be willing to help me by giving me feedback about how I'm doing in my relationship with you?"

   - Practice giving your idea in only one sentence (3x this week).

   - Ask permission first, then give feedback (3x this week).

   - Practice using the "What to Say" suggestions on the back of the card (3x this week).

2. **Demonstrate Respect**

   - Apply the "Waiter Rule." (The Waiter Rule states that how you treat staff or those in a service role reveals a lot about your character and demonstrates how you would most likely treat your employees. It shows the true makeup of your personality and your true disposition.)

   - Think about specific things you can do to show others you care: call people, write thank-you notes, don't let there be a gap between how you feel and what you do.

3. **Create Transparency**

   - Ask yourself, "Am I withholding information that should be shared?" If so, ask yourself why. Consider the tax you may be paying as a result and the dividends you could be getting by being more transparent.

   - Tell the truth in a way people can verify. Get real and genuine. Be open and authentic.

4. Right Wrongs

- The next time you make a mistake, pay attention to your response. Are you trying to ignore it, justify it, or cover it up? Or are you quick to admit it and do what you can to make restitution?

- Give some thought to your past. Are there wrongs that haven't been righted? Are there "estranged" relationships waiting to be made whole?

- The next time someone wrongs you, be quick to forgive. Try to make it easier for others to Right Wrongs.

5. Show Loyalty

- The next time you're in a situation where people start talking negatively about someone who's not there, suggest they have the conversation with the individual.

- Go out of your way to give credit. Help create an environment in which everyone's contributions are recognized and every person is acknowledged.

- Make it a rule never to talk negatively about those who are absent. Catch your employees doing things well and share your excitement about their contributions and achievements.

COMPETENCE BEHAVIORS

6. Deliver Results

- Make sure you thoroughly understand the expectations. If you really want to build trust, you have to know what "results" mean to the person to whom you're delivering them.

- The next time you plan to make a commitment to Deliver Results, stop and ask yourself if the commitment is realistic. To overpromise and underdeliver will make a withdrawal every time.

- With customers or co-workers, try to anticipate needs in advance and deliver before the requests are even made. The great Canadian hockey player Wayne Gretzky said, "I skate to where the puck is going to be, not to where it has been." Anticipating needs will give an added dividend to the deposit in the Trust Account.

7. **Get Better**

- Send out a "Stop/Start/Continue" inquiry to your direct reports, customers, team members, or family members.

- The next time you make a mistake, rather than agonizing over it, reframe it as feedback. Identify what you learned from it and ways you can improve your approach to get different results next time.

- Take steps to create an environment that makes it safe to make mistakes. Encourage others to take appropriate risks and to learn from failure so you can create high trust, high synergy, and high-level productivity.

8. **Confront Reality**

- The next time you are reluctant to Confront Reality, explore your feelings. Are you hesitant because of fear of the outcome or fear of the pain? Consider the consequences of not confronting reality. Confront the reality and treat people with respect.

- Work on being completely honest with yourself. Take on the challenge of aligning your life with the principles that will create the results you want to achieve.

9. **Clarify Expectations**

- When you communicate with others, recognize that clarity is power. One way of checking to see if your communication has been clear is to "check for clarity" by asking a few simple questions: "What have you understood from this conversation? As a result of our interaction, what do you see as your next steps? What do you see as mine? Do you feel that everyone is clear regarding expectations? What can we do to make things more clear?"

- Meet with each team member to discuss and Clarify Expectations—first theirs and then yours—in the next 30 days.

- Meet with three peer leaders you work with to Clarify Expectations within 30 days.

10. Practice Accountability

- Listen to your language and your thoughts. When things go wrong and you find yourself blaming or accusing others, stop. Step back and ask yourself, "How can I close the window and focus on the mirror?"

- Hold other people accountable for their actions. Always Clarify Expectations first so that everyone knows what they're accountable for and by when.

- Look for ways to create an environment of accountability. Set up trust talks with your associates on matters you've agreed to work on together. Create agreements concerning responsibilities and set clear expectations. Follow through on your agreements. Give associates a person—and a culture—they can trust.

- Make it a rule never to talk negatively about those who are absent. Catch your employees doing things well and share your excitement about their contributions and achievements.

CHARACTER AND COMPETENCE BEHAVIORS

11. Listen First

- The next time you're in a conversation, stop and ask yourself, "Have I really listened to the other person? Do I really understand how he or she feels?" If not, simply stop and do it. Set your own agenda aside and focus on understanding the other person's point of view before you share your own.

- Don't get caught up in the illusion that you know everything or have all the answers.

- Practice letting others talk first before you make a comment in every meeting.

- Only comment after you have paraphrased another's comment to his or her satisfaction (3x this week).

- Be the last to offer your opinion (4x this week).

12. Keep Commitments

- The next time you make a commitment, be sure it is realistic. Even if you have to disappoint someone, it is better to do it up front than to overpromise and underdeliver.

- Make sure you follow through with what you've committed to do. If you have to miss a deadline, attempt to renegotiate expectations as early as possible; don't just ignore it and be late.

- Pay attention to your language. Realize that when you say you will do something, others see that as a commitment.

13. Extend Trust

- Think about a relationship where you feel someone doesn't trust you. Ask yourself, "Could this person's lack of trust in me, at least in part, be a reflection of my own lack of trust in him or her?"

- On a scale of 1 to 10, determine where you are in terms of extending trust to others, either at work or at home. If you rated yourself a 5 or lower, identify one or two steps you could take to extend more trust.
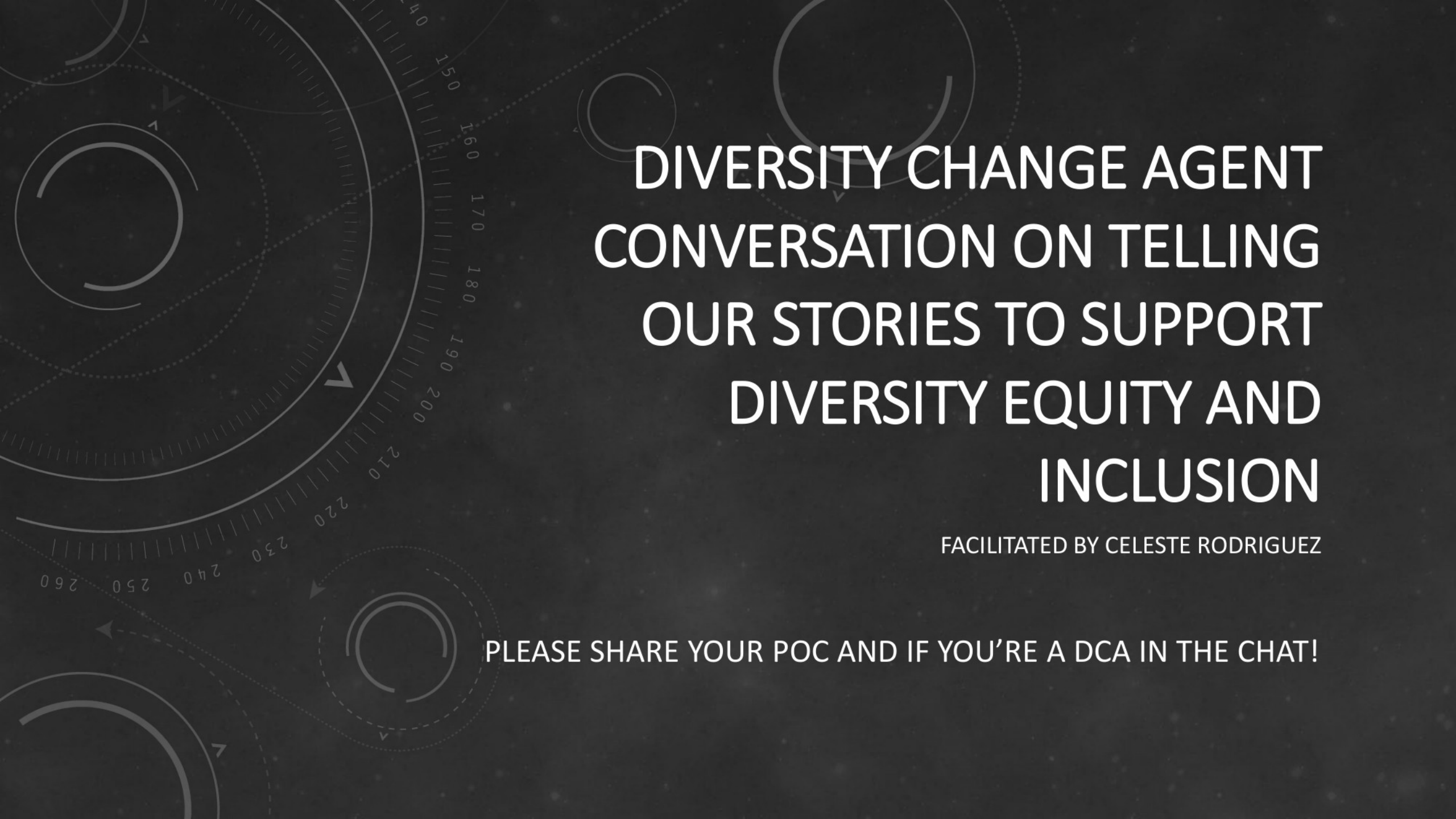
| Leadership | Execution | Productivity | Trust | Sales Performance | Customer Loyalty | Education |

FranklinCovey

THE ULTIMATE COMPETITIVE ADVANTAGE

DIVERSITY CHANGE AGENT CONVERSATION ON TELLING OUR STORIES TO SUPPORT DIVERSITY EQUITY AND INCLUSION

FACILITATED BY CELESTE RODRIGUEZ

PLEASE SHARE YOUR POC AND IF YOU'RE A DCA IN THE CHAT!

DIVERSITY CHANGE AGENTS ARE CHARGED WITH

- Leading by example

- Supporting efforts to enhance our capacity to attract and retain talented employees

- Communicating effectively – In Word and In Deed, and

- Educating the workforce on diversity and inclusion

If you are interested in learning more:
https://connected.ed.gov/di/SitePages/Diversity%20Change%20Agent%20Program.aspx

In the chat, please share any efforts you've been a part of or have hosted in your POC as a DCA.

REFLECTION OPPORTUNITY TO GROUND THIS CONVERSATION

Take notes on your answers to the questions below. What do you notice? Why does your community look like it does? Is there anything you want to change and how?

- What do your 7 closest friends look like?

- Who are the authors of the last 7 books that you read?

- What does the cast of the last 7 shows and movies you've watched look like?

- What do the 7 closest members of your work team look like?

- What do your 7 closest (in terms of proximity) neighbors look like?

- What do your top 7 personal service providers (doctors, dentist, etc) look like?

WHY IS IT IMPORTANT TO TELL OUR STORIES?

Story-telling:

- creates personal connections,

- encourages empathy,

- provides historical and cultural context to situations, and

- persuades and influences others.

You can't get to courage without rumbling with vulnerability.

EMBRACE THE SUCK.

Brené Brown

ELEMENTS OF GOOD STORYTELLING

Make sure to:

- Have a beginning, middle, and end

- Tell ONE clear story with adequate descriptions and details

- Be concise

- Own your experiences with your feelings and facts

- Make the impact clear

Avoid

- Telling more than one story

- Offering unneeded details

- Making broader commentary about groups or cultures – focus on you.

- Making the story too long

Time to get personal…
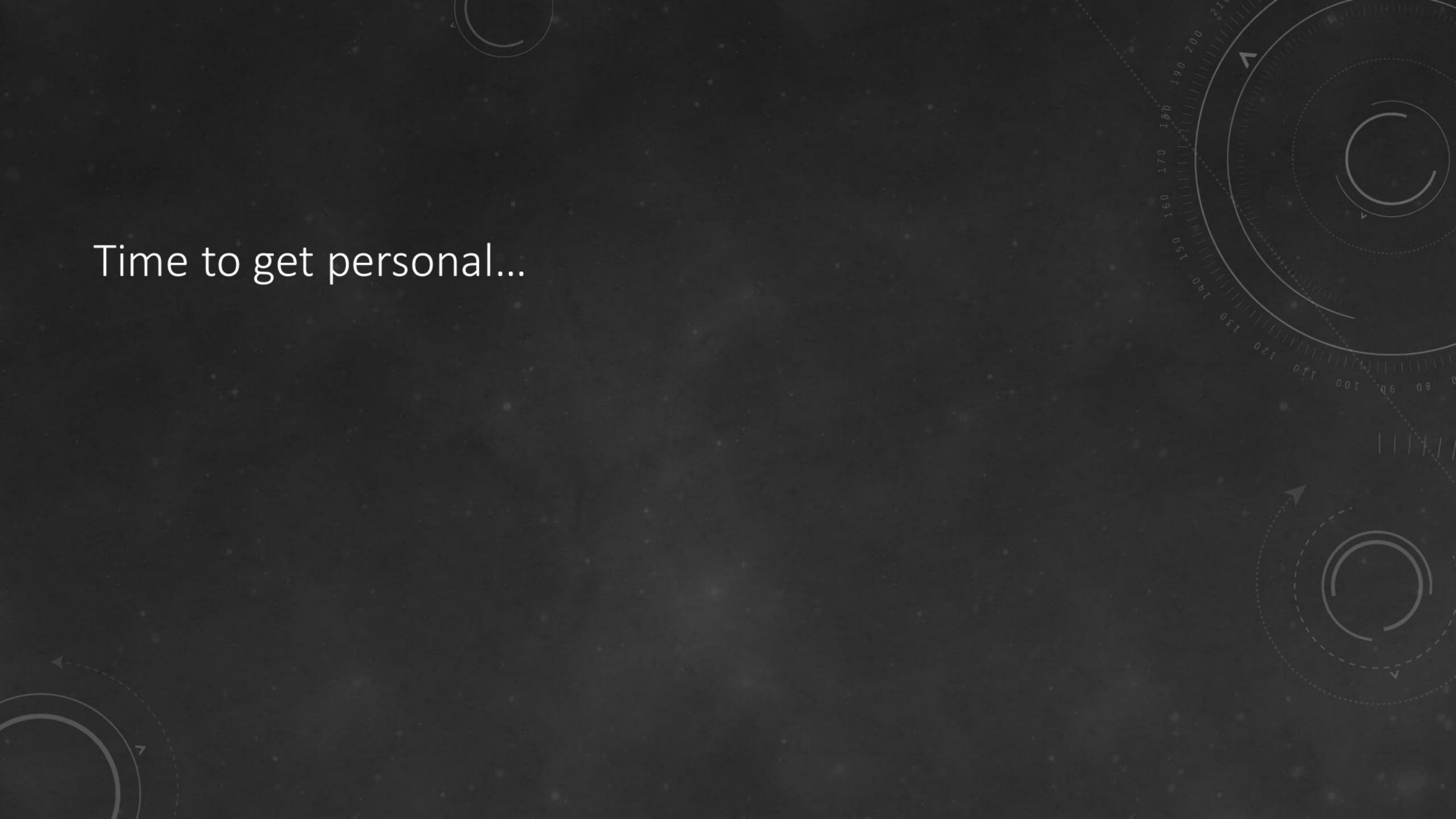
WHY IS DIVERSITY, INCLUSION, AND EQUITY IMPORTANT TO YOU?

A few questions to help you expand your answer to the big question.

- If you're a DCA, what motivated you to become one?

- Why are DEI efforts important to you?

- What in your past experiences motivates you to have discussions about DEI?

- What do you feel comfortable sharing with people at work?

TIPS ON HOW TO GIVE FEEDBACK

Use a sandwich – positive, constructive, positive

Stay curious – ask questions about the part of the story that you think should be further developed

Be specific – help the story-teller zoom in to the most effective aspects of their story

Make suggestions – after you identify an opportunity for improvement try to provide a solution

Clear
is
kind.

UNCLEAR IS UNKIND.

dare to lead. (Unknown)

TIME TO BREAK INTO SMALL GROUPS

Please take turns telling your story and the other group members will provide feedback.

Storytellers – 2 minutes to tell your story

Feedback - 3 minutes

I will give you timing cues.

> When we have the courage to walk into our story and own it, we get to write the ending.
>
> AND WHEN WE DON'T OWN OUR STORIES OF FAILURE, SETBACKS, AND HURT—THEY OWN US.
>
> dare to lead   Brené Brown

REFLECTION

How are you feeling about sharing your story?

What lessons are you walking away with today?
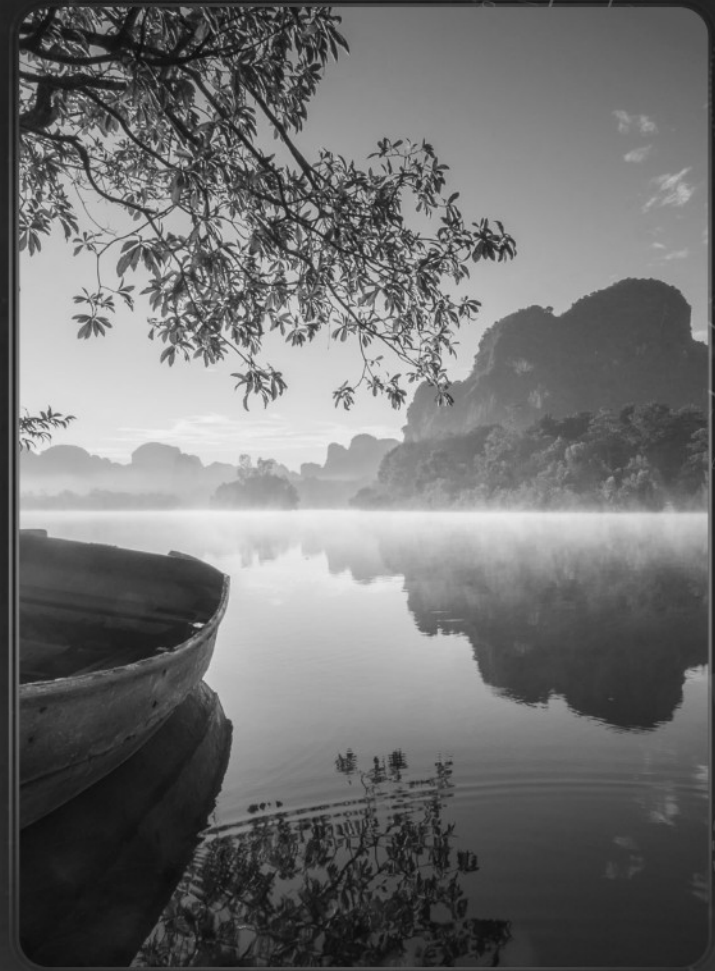
Course Transcript

Mandatory EEO Training for Supervisors and Employees

Course Overview

Read the Course Overview .

Mandatory EEO Training for Supervisors and Employees

Course Overview

Welcome to the Mandatory EEO Training for Supervisors and Employees! The purpose of this training is to provide you with an update on recent Equal Employment Opportunity Commission (EEOC) guidance and help you understand the EEO program requirements.

The training includes updates on Equal Employment Opportunity (EEO) laws, theories and definitions, an overview of Management Directive (MD) 715 regarding essential elements of a model EEO program, discriminatory harassment prevention strategies, information on Alternative Dispute Resolution (ADR), reasonable accommodation guidelines, legal requirements of the No FEAR Act, and the White House Executive Order 14035 on promoting diversity, equity, inclusion, and accessibility in the federal workforce.

At the end of the training session, you will be able to take the test and print your certificate of completion.

Supplement

Selecting the link title opens the resource in a new browser window.

Additional Information

Executive Order 14035 on Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce

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Nothing herein, or in the course materials, shall be construed as professional advice being provided for any particular situation or constitute a legal opinion with respect to compliance with any federal, state, or local laws. The information contained herein is provided only as general information that may or may not reflect the most current legal developments. Should you have any questions, please contact the Office of Finance and Operations, Office of EEO Services at 202-401-3560 or via email address: OFO_eeos@ed.gov .

Equal Employment Opportunity Laws

Learning Objective

After completing this topic, you should be able to

- *Understand the basic concepts of EEO laws and regulations and the objectives of the federal EEO program.*

1. An overview of the laws

Question

The United States has a comprehensive set of laws that protect both the employer and the employee. Do you know which law was the most comprehensive in establishing rules that protected American workers against discriminatory employment practices?

Options:

1. The Civil Rights Act of 1964 and 1991 (Title VII)

2. The Pregnancy Discrimination Act of 1978

3. Equal Pay Act of 1963, 29 CFR §1614

4. The Age Discrimination in Employment Act (ADEA) of 1973

5. Rehabilitation Act of 1973, as amended, 29 USC §791, 793, 794(a) in Sections 503 and 504

Answer

Although other laws have extended workers' rights, the Civil Rights Act is the most comprehensive anti-discrimination law in the United States.

Correct answer(s):

1. The Civil Rights Act of 1964 and 1991 (Title VII)

The Civil Rights Act of 1964 (Title VII) was a ground breaking law in American history. It began as a strong movement to create workplaces that protect the rights of workers and prohibit discrimination within agencies.

Equal Employment Opportunity (EEO) laws include

The Civil Rights Act of 1964 and 1991 (Title VII)

Civil Rights Act of 1964, 42 USC as amended §2000 et. seq., is the major federal law prohibiting discrimination in employment. Title VII prohibits discrimination based on race, sex, color, religion, or national origin, and covers all areas of the employee-employer relationship, from advertising open positions through termination or retirement. Enforced by EEOC. See also: Civil Rights Act of 1991. Civil Rights Act of 1991, PL 102-166, amends the Civil Rights Act of 1964 by providing remedies for intentional discrimination and unlawful harassment in the workplace; codifying the concepts of "business necessity" and "job related"; providing authority and guidelines for the adjudication of disparate impact cases; and responding to recent decisions of the Supreme Court by expanding the scope of relevant civil rights statutes in order to provide adequate protection to victims of discrimination.

The Pregnancy Discrimination Act of 1978

The Pregnancy Discrimination Act is an amendment to Title VII that extends sex discrimination to include pregnant women. The Pregnancy Discrimination Act of 1978 amended Title VII of the Civil Rights Act of 1964 prohibits discrimination against a woman due to pregnancy, childbirth, or a medical condition related to pregnancy or childbirth. The law also prohibits retaliation against a person who complained about discrimination, filed a charge of discrimination, or participated in an employment discrimination investigation or lawsuit.

The Equal Pay Act of 1963

Equal Pay Act of 1963, 29 USC §206 (d), prohibits employers from discriminating on the basis of sex in the payment of wages where substantially equal work is performed under similar working conditions.

The Age Discrimination in Employment Act of 1967

Age Discrimination in Employment Act of 1967, as amended, 29 USC §621-634, protects employees and job applicants who are 40 years of age or older from employment discrimination based on age with respect to any term, condition, or privilege of employment -- including, but not limited to hiring, firing, promotion, layoff, compensation, benefits, job assignments, and training.

Rehabilitation Act of 1973

Rehabilitation Act of 1973, as amended, 29 USC §791, 793, 794(a) in Sections 503 and 504, prohibits discrimination against individuals with disabilities and requires institutions to take affirmative action to hire and promote qualified individuals with disabilities. Institutions are required to recruit and consider individuals with disabilities for vacant positions, and they must provide "reasonable accommodation" to the known physical or mental limitations of otherwise qualified individuals with disabilities, such as providing special equipment or modifying the job.

Notification and Federal Employee Anti-discrimination and Retaliation (No FEAR) Act of 2002

Notification and Federal Employee Anti-discrimination and Retaliation (No FEAR) Act of 2002, 5 USC §2301, holds agencies fiscally responsible if they lose or settle EEO discrimination and whistleblower protection cases filed in U.S. District Court; requires yearly reporting of analysis of discrimination and whistleblower cases; and requires that quarterly updates of this analysis be posted on the agency Website.

Americans with Disabilities Act Amendments Act (ADAAA) of 2008

In its introduction to the act, Congress states its intent that "the primary object of attention in cases brought under the ADA should be whether entities covered under the ADA have complied with their obligations" and that "the question of whether an individual's impairment is a disability under the ADA should not demand extensive analysis." The ADAAA states that *Toyota Motor Manufacturing, Kentucky, Inc. v. Williams*, 102 LRP

6137 , 534 U.S. 184 (2002), incorrectly narrowed the scope of the ADA by interpreting the term "substantially limits" to require a greater degree of limitation than was intended by Congress." The definition of disability in this chapter shall be construed in favor of broad coverage of individuals under this chapter, to the maximum extent permitted by the terms of this chapter." 42 USC §12102 (4)(A).

The Genetic Information Non-discrimination Act of 2008

The Genetic Information Non-discrimination Act (GINA) prohibits employers, employment agencies, and labor unions from using individuals' genetic information when making hiring, firing, job placement, or promotion decisions. It also prohibits group health plans and health insurers from denying coverage to a healthy individual or charging that person higher premiums based solely on a genetic predisposition to developing a disease in the future. An employer cannot acquire employees' genetic information except under limited circumstances and must keep employees' genetic information confidential.

Although they remain subject to change, the EEOC's proposed regulations make it illegal for employers to:

- refuse to hire, fire, limit, or otherwise discriminate based on protected genetic information;
- retaliate against an employee because he or she has opposed any illegal practice under GINA, or participated in an investigation or hearing; or
- request or purchase genetic information about employees or their family members.

There are some exceptions to the prohibitions under GINA; for instance, employers may continue to offer health and genetic services as part of a voluntary wellness program.

The U.S. Equal Employment Opportunity Commission (EEOC) enforces all of these laws. EEOC also provides oversight and coordination of all federal equal employment opportunity regulations, practices, and policies.

Other federal laws, not enforced by EEOC, also prohibit discrimination and reprisal against federal employees and applicants. The Civil Service Reform Act of 1978 (CSRA) contains a number of prohibitions, known as prohibited personnel practices, which are designed to promote overall fairness in federal personnel actions. 5 USC §2302. The CSRA prohibits any employee who has authority to take certain personnel actions from discriminating for or against employees or applicants for employment on the bases of race, color, national origin, religion, sex, age or disability. Recent executive orders also provide that certain personnel actions cannot be based on attributes or conduct that do not adversely affect employee performance, such as sexual orientation, marital status and political affiliation. The Office of Personnel Management (OPM) has interpreted the prohibition of discrimination based on conduct to include discrimination based on sexual orientation. The CSRA also prohibits reprisal against federal employees or applicants for whistle-blowing, or for exercising an appeal, complaint, or grievance right. The CSRA is enforced by both the Office of Special Counsel (OSC) and the Merit Systems Protection Board (MSPB).

Additional information about the enforcement of the CSRA may be obtained from OPM at http://www.osc.gov; and MSPB at http://www.mspb.gov.

The EEO Commission (EEOC) is the federal agency that enforces employment discrimination for both private and public sectors. Specifically, federal laws prohibit employers from making personnel decisions on the basis of race, color, age (over 40), sex (including sexual orientation, transgender status, gender

identity, and pregnancy), mental or physical disabilities, national origin, religion, genetic information, and reprisal for participating in prior EEO activities. This applies to all terms and conditions of employment including, but not limited to, recruitment, hiring, promotions, transfers, reassignments, training, career development, benefits, and separation.

So compliance with EEO laws in recruitment and hiring not only avoids lawsuits, it also encourages and promotes a more diverse workforce.

Thus, equal employment opportunity (EEO) refers to the legal requirement that agencies provide employees a full opportunity to function and progress in their careers based on their abilities and performance, rather than on non-merit factors--such as race, sex or age.

A model EEO program requires a coordinated effort among supervisors, managers, EEO and human resource program officials. Working together employers seek to ensure that all employees are provided with:

1. the opportunity to compete fairly for positions for which they are qualified;
2. receive objective ratings based on their performance; and
3. not be subjected to personnel decisions based on non-merit factors.

2. Summary

Being familiar with EEO laws can help improve the fairness and objectivity of an agency's employment practices.

Understanding these laws also helps to ensure that agencies comply with the law, thereby reducing its risk of litigation and penalties for unfair employment practices.

EEO Theories and Definitions

Learning Objectives

After completing this topic, you should be able to

- *Recognize a personal responsibility to prevent harassment and discrimination in the workplace.*
- *Learn the discrimination theories including disparate treatment, disparate impact and reasonable accommodation.*

1. Disparate Treatment and Disparate Impact

What is EEO discrimination? Discrimination is the term used to refer to the improper and unlawful practice of basing personnel decisions on one or more non-merit factors, such as race, sex, color, national origin, religion, age, etc.

There are various terms that employers should be familiar with as they learn about employment laws. These terms deal with the protection of both employers' and employees' rights.

Terms that employers should be familiar with as they learn about employment laws include:

- Disparate Treatment
- Disparate Impact
- Reasonable Accommodation

The terms disparate treatment and disparate impact apply to the unfair treatment of employees or applicants.

Disparate treatment is when an individual is treated less favorably than other similarly-situated persons based on membership of a protected class.

Disparate impact is a policy or practice that creates a disproportionate negative impact on members of a protected class.

To ensure that you and the agency comply with EEO laws and understand the difference between:

Disparate Treatment

Disparate treatment has occurred if, for example, a male manager hires a male applicant rather than a more qualified female applicant for a management position because he does not like working with women. In this case, the manager has intentionally discriminated against an applicant based on sex. If someone overhears the manager saying that he prefers to put a man into a management position, it would add to the strength of the sex discrimination charge that could be filed.

In handling disparate treatment cases, the Supreme Court in McDonnell Douglas Corp. v. Green has set forth an order and burden of proof for establishing whether or not such a motivation exists as follows: A. The plaintiff must establish a prima facie case; B. The defendant must offer a legitimate, non-discriminatory reason for its actions; and C. The plaintiff must establish that this supposedly legitimate, non-discriminatory reason was a

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pretext to mask an illegal motive. The Supreme Court has also made it clear that the burden of proof at all times remains with the plaintiff.

Disparate Impact

Disparate impact claims assert that an employer's policy, though appearing neutral on its face, disproportionately impacts a protected class. Once a plaintiff establishes a prima facie case of disparate impact, the employer must demonstrate that the policy was justified by business necessity. The plaintiff must then show that there is an alternative policy or practice that can achieve the same goal without a disparate impact. The notion behind the adverse impact theory is that employment criteria, although facially neutral, can have the effect of disproportionately disadvantaging a certain protected class or classes. The burden is on the plaintiff, not the defendant, to provide evidence of the statistical impact of the employer's facially neutral policy or practice on the plaintiff's protected class. The theory is most often advanced in class actions.

Unlike the theory of intentional discrimination, the theory of disparate or adverse impact discrimination does not require any showing of the employer's motive. Rather, the focus is entirely on the effect of the employer's policies and practices

For example, in order to establish a prima facie case of race discrimination under a disparate impact analysis, the petitioner must show that the challenged practice or policy disproportionately impacted members of the protected class. Specifically, petitioner must: (1) identify the specific practice or policy challenged; (2) show a statistical disparity; and (3) show that the disparity is linked to the challenged policy or practice.

The most important point to remember is that once the complaining party establishes a prima facie case of disparate impact, the employer has the burden of proving that the challenged practice is job-related for the position in question and consistent with business necessity. If the employer satisfies this burden, petitioners may nevertheless prevail if they provide an alternative employment practice that would accomplish the same goal with a less adverse impact on their alleged protected class.

Question

Please define the terms by dragging the letters to the boxes in order to match the appropriate responses.

Options:

A. Individual is treated less favorably than other similarly-situated persons because of a prohibited EEO basis.

B. A policy or practice that creates a disproportionate negative impact on members of a protected class.

Targets:

1. Disparate treatment

2. Disparate impact

Answer

Disparate treatment is when an individual is treated less favorably than other similarly-situated persons because of a prohibited EEO basis, whereas disparate impact is a policy or practice that creates a disproportionate negative impact on members of a protected class.

Correct answer(s):

Target 1 = Option A

Target 2 = Option B

The EEOC regulations, 29 CFR §1614, require employers to make reasonable accommodation to both applicants and employees with particular religious beliefs and qualified applicants and employees with disabilities unless the accommodation would impose undue hardship on the business of the agency. In situations where management cannot provide reasonable accommodation, they must be able to demonstrate legitimate, non-discriminatory reasons for their decision.

2. Reasonable Accommodation

A reasonable accommodation is any modification or adjustment to a job or the work environment that will enable a qualified applicant or employee with a disability or particular religion to participate in the application process or to perform essential job functions.

The two most common groups of individuals who require reasonable accommodation are individuals with disabilities and people who have certain requirements due to their religion.

29 CFR §1614 outlines what is expected of employers in terms of the reasonable accommodation of people with disabilities and with specific religious requirements.

The U.S. Department of Education (ED) is required under Sections 501 and 504 of the Rehabilitation Act of 1973, as amended, to provide reasonable accommodation for qualified individuals with disabilities. The Federal sector's equal employment opportunity regulations for the Rehabilitation Act, at 29 CFR §1614.102(a)(8), state in part: "The agency shall make reasonable accommodation to the known physical or mental limitation of qualified applicants and employees with handicaps unless the accommodation would impose an undue hardship on the operation of the agency's program." In addition, Executive Order 13164: *Establishing Procedures to Facilitate the Provision of Reasonable Accommodation*, requires all federal agencies to establish written procedures for handling requests for reasonable accommodation. For a copy of the reasonable accommodation handbook, please select the link below.

Supplement

Selecting the link title opens the resource in a new browser window.

Additional Information

https://connected.ed.gov/Documents/Handbook%20 for%20Reasonable%20Accommodations.pdf

Religious practices - Employers must provide reasonable accommodation for employees and job applicants due to their religious beliefs or practices when those accommodations can be made without undue hardship on the business of the employer. An employer is not required to accommodate an employee's religious beliefs and practices if doing so would impose an undue hardship. This may include situations where accommodating an employee requires more than ordinary administrative costs, affects efficiency in other jobs, infringes on other employees' job rights or benefits, impairs workplace safety, or conflicts with another law or regulation.

Title VII prohibits discrimination based on religion or religious belief: (1) it prohibits such discrimination as it does with the other bases of race, sex, color, and national origin, and (2) it places a duty upon employers to accommodate religious beliefs and practices, unless such accommodation would place an undue burden upon the employer. The guidance set forth at 29 CFR §1614.102(a)(7) states in part that the agency shall: "Make reasonable accommodation to the religious needs of applicants and employees when those accommodations can be made without undue hardship on the business of the agency."

The Rehabilitation Act defines reasonable accommodation for employees with disabilities according to two main factors:

Physical Facilities

Employers are expected to ensure that individuals with disabilities can access and use existing **physical facilities**. This could include ensuring that doorways are wide enough to allow wheelchair access and that the ramps and other physical structures are in place to accommodate individuals with disabilities.

Job Situations

Employers are required to ensure that reasonable accommodations are made for individuals with disabilities in terms of **job situations** as long as these accommodations do not pose an undue hardship on the employer.

This may involve restructuring jobs and modifying work schedules. Examples of reasonable accommodations include acquiring or modifying equipment, examinations, training materials, and policies to ensure that employees with disabilities are able to access and use them effectively. They may also include providing qualified readers or interpreters for workers with sight or hearing impairments.

However, an employer is not required to lower quality or production standards to make an accommodation, or to provide personal use items such as glasses or hearing aids.

Examples of reasonable accommodations that employers could provide for individuals with disabilities – during the hiring process and throughout their employment – include providing:

- computers with screen reader technology for visually impaired employees,
- an interpreter for employees who are hearing impaired,
- ergonomic chairs for employees with back problems,
- alternative work schedules for employees who are unable to work standard work hours for medical reasons, and/or
- rolling carts for employees with physical problems who have to carry things as part of their jobs.

Supplement

Selecting the link title opens the resource in a new browser window.

Note

For more information regarding reasonable accommodation requirements and procedures for individuals with disabilities, please contact the Office of EEO Services at 202-401-3560 or by email at: ReasonableAccommodations@ed.gov .

The accommodation should permit the employee to engage in the desired religious practice without infringing upon that employee's employment opportunities. For example, supervisors may not accommodate an employee by permitting leave to participate in religious practices and then using the unavailability of the employee as a basis for a poor performance evaluation or a failure to promote.

Reasonable accommodations that supervisors can make for applicants and employees of particular religions include ensuring that the employees are not required to work on their weekly holy day – on the Sabbath, for example – and giving days off for other religious holidays or festivals.

Supervisors can also allow breaks for employees who are required to pray several times during the day.

Roles and Responsibilities
Supervisors have the responsibility for:
• Ensuring that reasonable accommodation requests are handled correctly and expeditiously;
• Consulting with the Office of EEO Services staff for assistance when medical information is not sufficient to determine the nature of the disability and the need for accommodation;
• Engaging in the interactive process with the employee in order to resolve the accommodation request;
• Proactively identifying situations where an employee could benefit from a reasonable accommodation and discuss with the employee.
• Reviewing the Reasonable Accommodation Handbook and document all actions taken and decisions made in conjunction with the accommodation request.

Employees are responsible for:
• Providing accurate and complete information, as necessary, to establish the existence and nature of the disability and the need for reasonable accommodation;
• Engaging in the interactive process with the supervisor in order to resolve the accommodation request.

For more information, please contact the Office of EEO Services staff.

Question

Identify which practices may be barriers to people who hold certain religious beliefs. (Check all that apply)

Options:

1. Employees are required to work on weekends.

2. The department's dress code requires employees to wear chino-style pants and a baseball cap embossed with the department's logo.

3. A department policy prohibits facial hair.

4. A department expects workers to arrive on time for work.

5. A department encourages employees to participate in an upcoming blood donor clinic.

Answer

Option 1: *This is a correct option. Requiring all employees to work on weekends would be a barrier to people of certain religions who are prohibited from working on their weekly holy day or day of rest, or who feel they must attend religious services on a day of the weekend.*

Option 2: *This option is correct because it may interfere with religious prohibitions on wearing pants or may conflict with the need to wear a turban.*

Option 3: *This is a correct option. A prohibition on beards may be a barrier to males of certain religions that prohibit shaving.*

Option 4: *This is an incorrect option. All employers have a right to expect employees to be on time for work. This has nothing to do with altering a schedule so it does not interfere with religious practices.*

Option 5: *This is an incorrect option. The department is only encouraging employees to participate in the clinic, not requiring them to. Therefore, it is not discriminating against employees whose religion prohibits donating blood.*

Correct answer(s):

1. Employees are required to work on weekends.
2. The department's dress code requires employees to wear chino-style pants and a baseball cap embossed with the department's logo.
3. A department policy prohibits facial hair.

Question

Please define the terms by dragging the letters to the boxes in order to match the appropriate responses.

Options:

A. Disparate Treatment

B. Disparate Impact

C. Reasonable Accommodation

Targets:

1. Individual is treated less favorably than other similarly-situated persons because of the prohibited EEO basis.

2. A policy or practice that creates a disproportionate negative impact on members of a protected class.

  3. Measures to modify or adjust the work environment to enable the performance
   of the job functions.

Answer

*Disparate treatment refers to the intentionally different treatment of job applicants or
employees based on characteristics such as their race, color, national origin, sex, age, or
religion.*

*Disparate impact occurs when specific policies or practices have a negative effect on
members of a protected class, even if there was no intention to discriminate against that class
of people.*

*Reasonable accommodation involves removing obstacles – during interviews and in the
workplace – that could discriminate against people with disabilities or people of particular
religions.*

Correct answer(s):

Target 1 = Option A

Target 2 = Option B

Target 3 = Option C

3. Summary

The application of the EEO discrimination theories is to determine whether the alleged discrimination
occurred so that appropriate remedial action can be taken, if warranted. When EEO complaints are
lodged against the agency, managers and supervisors act as agents for the agency in positions of
authority for a real or perceived discriminatory action. Managers and supervisors make virtually all of the
personnel decisions that directly impact the agency's ability to comply with EEO laws and requirements.
They fill vacant positions, make selections for promotions, approve training, detail employees to other
positions, and set performance expectations for employees in their portion of the organization. By
understanding the discrimination theories, managers and supervisors will better understand what they
should, and should not, be doing. Certainly, employee actions/behaviors may sometimes be the cause
for actions that are being taken. Improper behavior and resultant management actions often become an
issue in the filing of discrimination complaints. Thus it is important that managers and supervisors
understand the EEO guidelines and take an active role in helping their employees to recognize their
rights and responsibilities in the EEO process and maintaining a discrimination-free work environment
for everyone.

Notification and Federal Employee Anti-discrimination and Retaliation (No FEAR) Act of 2002

Learning Objectives

After completing this topic, you should be able to

- *Learn the No FEAR Act legal requirements and protections as related to employees' rights and remedies, and understand how the Act is being implemented.*

- *Understand the basic concepts of Whistleblower protection laws and prohibitions on retaliation for protected disclosures.*

1. Overview

Many people feel that they are unable to report or provide evidence related to incidents of discrimination – very often for fear of losing their jobs.

The No FEAR Act ensures that federal agencies and federal employees comply with anti-discrimination laws, and protects people who want to report discrimination.

Reflect

How do you feel about reporting incidents of discrimination in your work environment?

Enter your thoughts below. Then select the Next Page button.

Write down your response or enter it in a text file in your word-processor application (or in a text editor such as Notepad) and save it to your hard drive for later viewing.

The No FEAR Act requires federal agencies that are covered by the act to:

- provide notification and training to employees and applicants on the rights protected by the act,
- produce annual reports of status and progress,
- reimburse the Judgment Fund for discrimination and whistleblower-related settlements, and
- conduct studies on the trends and causes of discrimination complaints.

2. Federal employee rights

As a whole, the No FEAR Act serves to:

- enforce a system of education for federal employees on their rights,
- protect federal employees from discrimination on the grounds of race, color, religion, sex (including sexual orientation, transgender status, gender identity and pregnancy), national origin, age (40 and over), disability, marital status, genetic information, or political affiliation,

- protect federal employees from reprisal in response to whistleblowing, and
- enforce federal employees' right to report incidents of reprisal as a result of reporting discrimination.

3. Whistleblower Protection Laws

Whistleblower Protection Act (WPA)

The Whistleblower Protection Act (WPA) protects Federal employees and applicants for employment who lawfully disclose information they reasonably believe evidences a violation of law, rule, or regulation, gross mismanagement, a gross waste of funds, an abuse of authority or a substantial and specific danger to public health or safety. Under the WPA, Federal employees may not take, fail to take or threaten to take any personnel action against an employee or applicant for employment because of the employee or applicant's protected whistleblowing. See 5 USC §2302(b)(8).

Whistleblower Protection Enhancement Act (WPEA) of 2012

The WPEA strengthened existing whistleblower protections for federal employees. The WPEA:

• Clarifies that a disclosure does not lose protection because:

  - it was made to someone who participated in the wrongdoing;
  - it reveals information that was previously disclosed;
  - of the employee's motive for disclosure;
  - it was made while the employee was off duty;
  - it was made during the normal course of duty;
  - of the amount of time since the occurrence of the events described in the disclosure.

• Protects disclosures that an employee reasonably believes are evidence of censorship related to research, analysis, or technical information;
• Expands the penalties imposed for violating whistleblower protections;
• Establishes a Whistleblower Protection Ombudsman in the Office of the Inspector General (OIG).

Whistleblower Protection Ombudsman

The Whistleblower Protection Ombudsman (WPO) educates Department employees on prohibitions on retaliation for protected disclosures. Additionally, the WPO educates employees who have made or are contemplating making a protected disclosure about their rights and remedies. The WPO is not a legal representative, advocate, or agent of the employee or former employee.

You can contact the WPO at (202)-987-0179.

Office of Special Counsel (OSC)

The Office of Special Counsel (OSC) is a Federal agency that investigates and prosecutes prohibited personnel practices by Federal agencies, including whistleblower retaliation. If you believe you have been subject to retaliation for protected whistleblowing, contact OSC, 1730 M Street, N.W., Suite 218, Washington, DC 20036-4505, 202-254-3600 (Phone), 800-872-9855 (Toll Free), 800-877-8339 (Federal Relay Service), www.osc.gov.

Question

Which of the following are NOT included in the protected disclosure categories under 5 USC §2302(b)(8)?

Options:

1. Violation of any law, rule, or regulation

2. Mismanagement

3. Gross waste of funds

4. Abuse of authority

5. Substantial and specific danger to public health or safety

Answer

Correct answer(s):

2. Mismanagement

Question

Under the WPEA of 2012 if a gross waste of funds is reported to a supervisor who is involved in the wrongdoing you would not be considered to have made a protected disclosure.

Options:

1. True

2. False

Answer

Correct answer(s):

2. False

Question

Which of the following are duties of the OIG Whistleblower Protection Ombudsman?

Options:

1. Educate agency employees about prohibitions on retaliation for protected disclosures.

2. Serve as a legal advisor to employees who feel they are victims of retaliation for a protected disclosure.

3. Educate agency employees who have made or are contemplating making a protected disclosure about their rights and remedies against retaliation for protected disclosures.

4. Serve as an advocate for employees who feel they are victims of retaliation for a protected disclosure.

Answer

Correct answer(s):

1. Educate agency employees about prohibitions on retaliation for protected disclosures.
3. Educate agency employees who have made or are contemplating making a protected disclosure about their rights and remedies against retaliation for protected disclosures.

Question

A federal employee authorized to take, direct others to take, recommend or approve any personnel action may not take, fail to take, or threaten to take any personnel action against an employee because of protected whistleblowing.

Options:

1. True
2. False

Answer

Correct answer(s):

1. True

Question

Which of these options represent the basic rights that are provided to employees under the No FEAR Act? (Check all that apply)

Options:

1. Protection from all types of unlawful discrimination in the workplace.

2. Protection from retaliation if they are involved in whistleblowing.

3. Access to training programs that educate them of their rights.

4. Access to the personnel files of known discriminators in the workplace.

5. Protection from unsafe or hazardous working conditions.

Answer

Correct answer(s):

1. Protection from all types of unlawful discrimination in the workplace.
2. Protection from retaliation if they are involved in whistleblowing.
3. Access to training programs that educate them of their rights.

Federal employees should actively ensure that the rights supported by the No FEAR Act are not violated.

Federal supervisors have the authority when making personnel decisions related to appointments, promotions, discipline, transfers, reassignments, reinstatements, pay, benefits, training, change in duties, responsibilities, or working conditions. This can be done by avoiding the use of prohibited personnel practices.

The provisions of No FEAR Act are consistent with 5 USC §2302(b) as related to prohibited personnel practices, in which it states that federal employees who have authority to make personnel decisions shall not:

practice discrimination on the basis of a protected characteristic,

It is against the law to discriminate against an employee or applicant based on race, color, religion, sex (including sexual orientation, transgender status, gender identity, and pregnancy), national origin, age (40 and over), genetic information, disability, marital status, or political affiliation.

This means that it is unlawful for a supervisor to consider that an employee is unfit for a promotion because the employee is Muslim.

improperly influence employment recommendations,

Managers or supervisors may not make employment recommendations based on factors other than personal knowledge or records of the applicant's job-related abilities.

A manager may not lawfully recommend an employee for a promotion simply because the employee is a personal friend.

coerce the political activity of anyone,

Political activity or affiliation may not be coerced. It is also unlawful to discriminate against employees or applicants because they hold a particular political viewpoint.

An example of this would be a supervisor denying promotion to a qualified employee because the employee is a member of the Green Party.

engage in nepotism,

It is unlawful to hire, promote, or recommend the hiring or promotion of your relatives when they are not the most qualified and suitable applicants for the position or promotion.

An example of nepotism would be a division head of an agency promoting his daughter when she is not the most suitable candidate for the job.

engage in reprisal for whistleblowing, and

Federal employees with personnel authority may not retaliate against employees or applicants who have disclosed information that provides evidence of violation of laws, rules, or regulations. It is also within an employee's or applicant's rights to blow the whistle on gross mismanagement, gross waste of funds, the abuse of authority, and situations that pose a danger to public health or safety.

If a supervisor fired an employee who reported the agency for endangering public safety by disposing of toxic chemicals in an unsafe manner, the supervisor would be engaging in reprisal for whistleblowing.

retaliate against employees who exercise their rights.

Managers and supervisors may not punish employees or applicants who have exercised appeals, complaints, or grievance rights. Employees or applicants who have given evidence on behalf of, or assisted others in exercising their rights, are also protected from reprisal.

An example of this would be a manager deciding to terminate an employee's employment because the employee has filed a complaint of sexual harassment against a friend of the manager.

4. Remedies available to federal employees

If a federal employee has been discriminated or retaliated against, certain remedies must be available to rectify the situation.

The remedies include:

- placing victims in the position they would have occupied if the discrimination had not occurred,
- paying compensatory damages,
- paying attorney's fees,
- reimbursing any benefits that were lost, and
- preventing further discrimination by stopping the specific discriminatory practices involved.

It is important that all federal employees are aware of their right to seek a remedy regarding discrimination and retaliation in the workplace.

For example, if you feel that you were the most suitable candidate for a promotion, but you think you were passed over because you are a woman, you should consider contacting an EEO counselor.

You should also consider seeking the advice of an EEO counselor if you feel that you have been retaliated against for participating in protected EEO activity.

5. Notification requirements

Your rights as a federal government employee under the No FEAR Act are publicized using two methods:

- Posting on the Internet
- Training

Question

How is notification about the No FEAR Act made available to federal employees? (Check all that apply)

Options:

1. Printed notices on bulletin boards
2. Articles and links on agency websites
3. Educational courses
4. Newspapers and magazines

Answer

Option 1: *This is an incorrect option. Federal agencies are required to post written documentation concerning employees' rights, not the No FEAR Act.*

Option 2: *This is a correct option. All federal agencies must provide notification about the No FEAR Act on their individual websites.*

Option 3: *This is correct. Federal agencies are obligated to provide training about the No FEAR Act for all their employees.*

Option 4: *This is not a correct option. Federal agencies are not required to publish information or notification concerning the No FEAR Act in the public media.*

Correct answer(s):

2. Articles and links on agency websites
3. Educational courses

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6. Training requirements

The training that you receive will focus on recognizing your rights and the solutions to discriminatory behavior or acts of reprisal that you may have experienced or witnessed.

Once you are aware of practices that do not comply with the No FEAR Act, you will be better equipped to exercise your rights and have knowledge of the remedies available to you.

The training on anti-discrimination laws will inform you how you are protected by the laws, which disallow acts of discrimination that are based on your:

- Sex (including sexual orientation, transgender status, gender identity, and pregnancy)
- Age (40 and over)
- Race or Color
- Disability

- National Origin
- Religion
- Genetic Information
- Reprisal

It is important that the training you receive informs you that anti-discrimination regulations apply to all job-related issues such as hiring, termination, promotion, compensation, benefits, and job training.

Any training on whistleblower protection laws should inform you that you are protected from retaliation in response to your presentation of evidence that a law or regulation has been violated within the agency.

An action cannot be taken against you if you come forward with evidence that could prove that someone within the agency has been involved in an illegal activity.

7. Reimbursement and Reporting Requirements

Upon a finding of discrimination, monetary relief in the administrative EEO process is paid directly from the funds of the agency found liable. When a federal agency is found liable for discrimination or retaliation in federal district court under the No FEAR Act, it is held financially accountable.

When an award of damages against the agency is payable out by the Judgment Fund housed in the Financial Management Service, U.S. Department of the Treasury, the discriminating agency is obligated to reimburse the Judgment Fund within a reasonable time under the Act.

No later than 15 days after the Judgment Fund has paid compensation to federal agency employees, the Financial Management Service (FMS), which is part of the Department of the Treasury, will send a notice to the agency requesting reimbursement for the payment.

By requiring agencies to carry the financial burden of discrimination and retaliation, agencies are made more accountable. This should encourage agency accountability with payment to discrimination and whistleblower laws.

In addition to the annual report, every federal agency is required to post statistical data relating to discrimination and equal employment opportunity complaints on its website.

Data relating to discrimination and equal employment opportunity complaints from previous quarters and previous years must also be available on each agency's website.

8. Summary

Employees, applicants for employment, and former employees of most federal government agencies must be informed about the No FEAR Act. This information must be made freely available in the forms of postings on agency websites and training programs.

It is essential that each federal agency provides a training program that covers topics relevant to anti-discrimination and whistleblowing laws. Federal agencies must ensure that managers have adequate training in the management of a diverse workforce and in dispute resolution and other essential communication skills. All federal employees need to understand and recognize discrimination, retaliation, and other prohibited practices.

The No FEAR Act does not introduce new laws and rights, but rather serves to enforce existing rights. Anti-discrimination laws, whistleblower protection, and equal employment opportunities are the main focus of the No FEAR Act.

Sexual Harassment Concepts

Learning Objective

After completing this topic, you should be able to

- *Learn the legal definitions (standards) of sexual harassment and the two types of sexual harassment.*

1. Legal Definitions/Standards of Sexual Harassment

Title VII of the Civil Rights Act of 1964 is the main federal law that covers discrimination in employment, including sexual harassment, and is enforced by the Equal Employment Opportunity Commission (EEOC).

Anti-discrimination laws and orders other than those enforced by the EEOC are:

The Civil Service Reform Act of 1978 (CSRA)

The CSRA promotes overall fairness in federal personnel actions by providing a list of prohibited personnel practices.

Executive Order 13087

Executive Order 13087, issued on May 28, 1998, prohibits sexual orientation discrimination in federal employment.

Merit Systems Protection Board

The Merit Systems Protection Board is a federal agency that protects the integrity of the federal merit system, including hearing appeals from adverse actions, for example, firing, suspensions, and demotions.

Office of Special Counsel (OSC)

OSC is an independent agency that protects federal employees from prohibited personnel practices by investigating complaints and acting as a prosecutorial agency.

Negotiated Grievance Procedure

A negotiated grievance procedure is an agreed upon structured process for resolving grievances. Union agreements typically contain such provisions.

Agency Grievance Procedure

An agency grievance procedure is the internal structured process for resolving grievances.

Question

Which anti-discriminatory laws and rules protect federal employees from harassment? (Check all that apply)

Options:

1. Title VII of the Civil Rights Act

2. CSRA

3. Executive Order 13087

4. EEOC

5. OSC

Answer

Option 1: *This is a correct option. Title VII of the Civil Rights Act of 1964 is an anti-discrimination law that is enforced by the Equal Employment Opportunity Commission (EEOC).*

Option 2: *This is a correct option. The Civil Service Reform Act of 1978 (CSRA) is an anti-discrimination law that promotes overall fairness in federal personnel actions.*

Option 3: *This is a correct option. Executive Order 13087 is an anti-discrimination rule that adds a prohibition of sexual orientation discrimination in federal employment.*

Option 4: *This is an incorrect option. The EEOC is not an anti-discrimination law, but an agency that enforces anti-discrimination laws.*

Option 5: *This is an incorrect option. The Office of Special Counsel (OSC) is an independent federal investigating agency that helps to protect federal employees from prohibited personnel practices.*

Correct answer(s):

1. Title VII of the Civil Rights Act
2. CSRA
3. Executive Order 13087

Distinguishing between welcome and unwelcome sexual behavior can be one of the greatest challenges associated with identifying sexual harassment. Recipients of unwelcome sexual behavior need to be clear and unambiguous in their response to the behavior.

Unwelcome sexual behavior can include any verbal or physical conduct of a sexual nature that is unsolicited and not encouraged by the receiver.

Sexual harassment must be unwelcome. However, consider why the United States Supreme Court recognized this case as a sexual harassment claim (See Meritor Savings Banks v. Vinson, 1986) when the woman alleged that she had sex with her supervisor because she feared that she would lose her job if she refused. The Court's ruling was based on the supervisor's unwelcome behavior even though the woman consented to having sex.

Unwelcome sexual behavior is not always sexual harassment.

In an attempt to clarify the boundaries of sexual harassment, the EEOC has defined an additional concept that should be considered when evaluating possible sexual harassment situations – the impact of the behavior on the terms and conditions of employment.

According to the EEOC's definition of sexual harassment, an incident of unwelcome sexual conduct can be a form of sexual harassment if it occurs in conjunction with one of three conditions; that is, if the conduct:

Explicitly or implicitly affects an individual's employment.

For example, if you were demoted because you declined a request for a sexual favor, you may have been the victim of sexual harassment.

The example uses the request for a sexual favor to illustrate unwelcome sexual behavior, and the demotion illustrates the impact on the terms and conditions of employment.

Unreasonably interferes with an individual's work performance.

An example would be if constant advances and communication of a sexual nature from a colleague hindered your ability to meet your deadlines.

In this case, the sexual advances and communication would represent unwelcome sexual behavior, and if keeping your job is dependent upon you meeting your deadlines, then the conditions of your employment may be adversely affected.

Creates an intimidating, hostile, or offensive work environment.

You may have been the victim of sexual harassment if the persistent exchange of crude jokes among your colleagues resulted in a hostile or offensive workplace.

In this example, the unwelcome sexual behavior is demonstrated by the persistent exchange of crude jokes, and the offensive workplace represents the conditions of employment.

In addition to the two concepts defined by the EEOC – unwelcome sexual conduct and its impact on the terms and conditions of employment – court rulings have developed additional requirements for sexual harassment:

- The "reasonable person" standard, and
- Severe or pervasive behavior.

In Harris v. Forklift Systems, 1993, the US Supreme Court said that a harasser's conduct should be evaluated from the objective standpoint of a **reasonable person.**

For example, if a reasonable person would find certain conduct harassing and the victim also found it to be harassing, it is not necessary that the victim have suffered actual injury to have a successful claim.

Reasonable person is a legal standard that relates to the objectivity of the offensiveness of behavior.

Because behavior that is offensive to some may not be offensive to others, the reasonable person standard determines if a hypothetical reasonable person would find the behavior offensive.

The severity and pervasiveness of the behavior should also be considered.

Severe Behavior

Severe behavior can include even a single incident of a sexual nature that a reasonable person would find very offensive.

Pervasive Behavior

Pervasive behavior can include comments, gestures, or actions that occur repeatedly over a period of time that a reasonable person would find offensive.

Court rulings that took the severity and pervasiveness of the behavior into account found sexual harassment to have occurred when employees were subjected to long patterns of ridicule on the basis of gender, but not where they were subjected to only occasional teasing or sexual remarks.

2. Types of Sexual Harassment

Sexual harassment can be classified as either **quid pro quo** or **hostile environment.**

The difference between quid pro quo and hostile environment harassment is the manner in which the harassed person's work environment is affected.

In **quid pro quo** cases, rejecting or submitting to the unwelcome sexual behavior results in tangible employment actions, such as hiring, firing, promoting, failing to promote, and assigning work. Quid pro quo can only be imposed by someone with supervisory authority.

Hostile environment, on the other hand, can be imposed by anyone with whom the employee interacts, including supervisors, colleagues, clients, or vendors. It involves unwelcomed offensive behavior that is so severe and pervasive that it affects the victim's terms of employment.

Quid pro quo can occur when:

- The submission to unwelcome conduct is made explicitly or implicitly a condition of employment.
- The submission to or rejection of unwelcome conduct is used as the basis for employment decisions.

Suppose you are employed in the client-service department of a federal agency and you overhear a conversation between your supervisor, Sara, and your colleague, Julio, who has recently been promoted.

Sara: Julio, I notice that you have been working many late nights. How are you coping with your new responsibilities?

Julio: I am coping really well. It is just that I am battling with clients who won't cooperate and that's taking up so much of my time.

Sara: You need to relax. If you come over to my place tonight, I will make dinner while we discuss hiring an assistant to do those menial tasks you should not be doing anyway.

Julio: Well, actually, I am happily married...and I'm spending time with my wife tonight.

Sara: If you want to keep your job, I expect you to make time for me too. It is up to you.

The conversation between Sara and Julio illustrates quid pro quo because Julio's ability to retain his position is conditioned on whether or not he submits to Sara's request.

Quid pro quo is further demonstrated when Sara threatens to demote or fire Julio for refusing her advances.

Other examples of quid pro quo are when:

- Submission to a sexual favor results in a promotion or easier work assignments.
- Rejection of a sexual advance results in the assignment of unpleasant, menial tasks or a demotion.

Hostile work environment occurs when unwelcome conduct unreasonably interferes with an individual's work performance or creates an intimidating, hostile, or offensive working environment.

Hostile work environment generally does not directly affect an employee's tangible employment benefits.

Various types of unwelcome behavior can contribute to a hostile work environment.

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It can be verbal in the form of discussions about sexual
activities, the telling of inappropriate jokes, the use of
crude language, commenting on physical attributes, and using
derogatory terms.

Physical forms of unwelcomed behavior include indecent
gestures, unnecessary touching, and displaying pictures that
are sexually suggestive.

Unwelcome behavior can also include sabotaging the work of a
colleague.
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3. Questions

Question Set

> The two types of sexual harassment are quid pro quo and hostile work environment.

Question 1 of 2

Question

Identify the examples that represent quid pro quo sexual harassment. (Check all that apply)

Options:

1. An employee who has been promoted is offended by the indecent gesture of another colleague.
2. A junior team member is assigned easier assignments because she runs frequent errands for her supervisor.

3. A senior staff member is denied a promotion because he refused to submit to
   a sexual request from his supervisor.

4. An employee who applies for a promotion is told to perform sexual favors to
   make up for her lack of experience.

Answer

*Option 1: This is an incorrect option. Although quid pro quo sexual harassment involves
unwelcome behavior, it also involves tangible employment decisions, such as a demotion.
Additionally, quid pro quo sexual harassment involves a supervisor and a subordinate, not
colleagues.*

*Option 2: This is an incorrect option. Quid pro quo is a type of sexual harassment. In this
case, there is no unwelcome conduct of a sexual nature or that is based on sex.*

*Option 3: This is a correct option. When an employee is denied a promotion because he
refused to submit to a sexual request from his supervisor, it represents quid pro quo sexual
harassment. Quid pro quo involves an employment decision that is made based on the refusal
or the submission to perform a sexual favor.*

*Option 4: This is a correct option. When an employee who applies for a promotion is told to
perform sexual favors in order to qualify, it is an example of quid pro quo sexual harassment.
This type of harassment occurs when the submission to unwelcome conduct is made a
condition of employment.*

Correct answer(s):

3. A senior staff member is denied a promotion because he refused to submit to a sexual
request from his supervisor.
4. An employee who applies for a promotion is told to perform sexual favors to make up for
her lack of experience.

Question 2 of 2

Question

Which examples represent hostile environment sexual harassment? (Check all that apply)

Options:

1. Staff members are reasonably offended by the indecent pictures displayed on
   some supervisors' walls.

2. An employee is angered by her supervisor's tendency to call her "Honey"
   despite having told him she finds it demeaning.

3. A supervisor demotes a junior team member for failing to complete a major
   work assignment.

4. A staff member is demoted because of her refusal to perform a sexual favor.

5. Continuous unwelcome e-mails of a sexual nature have prevented an employee from meeting her deadline.

Answer

Option 1: *This is a correct option. When staff members are reasonably offended by the indecent pictures displayed on some supervisor's walls, it represents hostile environment sexual harassment.*

Hostile environment occurs when unwelcome conduct creates an offensive working environment.

Option 2: *This is a correct option. Hostile environment occurs when unwelcome behavior, such as a supervisor calling an employee "Honey," creates a hostile or intimidating environment.*

Option 3: *This is an incorrect option. The team member was demoted for a valid cause; there is no indication that it was a result of hostile environment harassment.*

Option 4: *This is an incorrect option. When employment decisions are made based on the refusal or submission to sexual favors, it represents quid pro quo sexual harassment.*

Option 5: *This is a correct option. Hostile environment occurs when unwelcome conduct – in this case the e-mails of a sexual nature – unreasonably affects an individual's work performance.*

Correct answer(s):

1. Staff members are reasonably offended by the indecent pictures displayed on some supervisors' walls.
2. An employee is angered by her supervisor's tendency to call her "Honey" despite having told him she finds it demeaning.
5. Continuous unwelcome e-mails of a sexual nature have prevented an employee from meeting her deadline.

Employers' Obligations and Responsibilities

Learning Objective

After completing this topic, you should be able to

- *Recognize the agency's obligations in preventing sexual harassment and learn how to properly handle sexual harassment allegations.*

1. Employer's Obligations

Question

Consider the anti-harassment policies and complaint procedures within your agency. If you were faced with a situation that might constitute sexual harassment, what would your reaction be?

Options:

1. Ignore the behavior.
2. Confront the harasser.
3. Report the behavior.

Answer

Option 1: *Sexual harassment is an unpleasant and offensive situation, but ignoring the behavior is not going to make it go away. Your willingness to acknowledge sexual harassment should increase as you learn more about your rights regarding sexual harassment and the complaint processes available to you.*

Option 2: *If you feel comfortable doing so, confronting your harasser directly is certainly one of the first things you could do. Letting the person know directly that you do not appreciate their behavior may be all that is needed to stop it. But rest assured that if this does not work, or if you are afraid to confront the harasser for any reason, there are other means available. As you learn more about your rights regarding sexual harassment and the agency's complaint procedures you will learn that there are other avenues as well.*

Option 3: *Persistent, unwanted behavior should be reported as soon as possible so it can be stopped. As an employee of a federal agency, you should have access to an EEO Officer who can help you resolve the situation at the lowest level possible. As you learn more about your rights regarding sexual harassment and the complaint procedures available to you, you should be able to respond even more confidently when confronted with sexual harassment.*

All federal employees have the right to work in an environment that is free from prohibited discrimination and harassment, and it is the agency's responsibility to ensure that the rights of their employees are protected.

To ensure that employees' rights regarding sexual harassment are safeguarded, federal agencies should implement preventative measures against sexual harassment, such as anti-harassment policies and complaint procedures.

Agencies should also ensure that all employees have access to these policies and procedures.

2. Employee's Rights

All employees have the right to be **free from harassment.** To protect this right, an agency's anti-harassment policy should emphasize management's intolerance of sexual harassment.

The policy should also specify the types of behaviors that constitute sexual harassment.

Employees should be told that they have the right to report harassment to their EEO office and that they are encouraged to do so before it becomes severe or pervasive. Although isolated incidents of harassment do not necessarily violate federal law, employees should be assured that the agency will stop harassment before it reaches such a level of violation.

Each agency is required to establish its anti-harassment policy in accordance with EEOC guidance. For assistance, please contact the Office of EEO Services or visit the website at https://connected.ed.gov/ofo/Pages/Equal-Employment- Opportunity-Services.aspx

3. Summary

Agency's Obligations

When sexual harassment occurs, it is the agency's responsibility to protect employees' rights to a workplace that is free from both harassment and retaliation.

It is imperative that supervisors and managers take proactive measures to prevent sexual harassment from occurring and to swiftly cease harassment before it becomes severe or pervasive. Managers and supervisors may contact the agency's Harassment Prevention Coordinator, Workforce Relations Division (WRD), Office of Finance and Operations, by e-mail at EDAnti-HarassmentProgram@ed.gov or by telephone at (202) 664-9521 for internal administrative procedures in addressing allegations of harassment.

Dealing with Incidents of Sexual Harassment

Learning Objectives

After completing this topic, you should be able to

- *Understand how to handle the situations when dealing with allegations of sexual harassment.*
- *Recognize your roles and responsibilities in preventing sexual harassment in the workplace.*

1. Dealing with sexual harassment

When unwelcome behavior threatens to become sexual harassment, all parties involved in the situation are affected.

Although some actions may resolve the situation promptly and appropriately, others may be disruptive and cause further unnecessary damage to all parties concerned. So it is important to understand the most appropriate courses of action when dealing with sexual harassment.

Federal employees who have been sexually harassed have several courses of action available to them.

It is recommended that employees try to resolve the issues at the lowest level, but knowing that this is not always possible, there is a recommended sequence of actions which can be taken to ensure that the matter is dealt with quickly and efficiently.

Confront the harasser.

> One of the quickest ways to deal with sexual harassment is to confront the harasser. It could be that the behavior is a misunderstanding, or the person just may not have realized the actions are not welcome. If you feel comfortable doing so, this may be an appropriate first step. However, it is not required.
>
> If you feel uncomfortable in any way, you do not have to confront the harasser. You can contact the agency's EEO specialists/counselors to report the situation and that individual will help you.

Contact the agency's EEO officials.

> By law, each agency is required to provide access to an EEO specialist/counselor who will guide the employee through the handling of the complaint. The initial contact with the EEO counselor is part of what is called the "pre-complaint process" or "informal complaint." This contact must take place within 45 days of the alleged harassment.

File an EEO complaint.

> If the issue is not resolved during the pre-complaint process with the EEO counselor, an employee may file a formal complaint with the agency. The agency is then required to conduct an impartial and appropriate investigation of the complaint within 180 days of its filing.

File a civil lawsuit.

> When sexual harassment claims are not resolved through the informal and formal complaint processes, federal employees may resort to filing a private lawsuit.

When federal employees consider filing a private lawsuit, they should remember that they often must first have gone through the proper agency administrative complaint processes.

Most complaint procedures require applicants to file claims within a specific, short time frame from the date that the alleged discrimination occurred.

If confronting the harasser does not stop the unwanted behavior, or if you are uncomfortable about facing the harasser, you should consult with one of the EEO specialists/counselors in the agency.

Question

There are many courses of action one could take to resolve a sexual harassment complaint. However, there is a recommended order to ensure that it is handled fairly and in a timely manner for all involved.

Place these courses of action in the recommended sequence.

Options:

A. Confront your harasser only if you feel comfortable doing so.

B. File a pre-complaint with the EEO counselor.

C. File a formal complaint.

D. File a civil lawsuit after all agency processes have been exhausted.

Answer

It is important to follow agency policy and guidelines for reporting incidents of sexual harassment. It is best to try to resolve the situation at the lowest level possible, and if you do not feel comfortable confronting the harasser yourself, start with the EEO specialist/counselor. He or she will assist you from there.

Correct answer(s):

Confront your harasser only if you feel comfortable doing so. is ranked

This is an appropriate first step IF you feel comfortable.

File a pre-complaint with the EEO counselor. is ranked

This is an appropriate action to take next (or first, if you are uncomfortable confronting your harasser). The EEO counselor will guide you through the agency processes to help you resolve the matter at the lowest level possible.

File a formal complaint. is ranked

If you do not get satisfaction during the pre-complaint process, you can file a formal complaint against the agency. The agency's EEO office will inform you of your rights for this process and tell you what you need to do to pursue this course of action. However, it is up to you to actually file the complaint.

File a civil lawsuit after all agency processes have been exhausted. is ranked

> This is the action of last resort if the matter is not resolved satisfactorily by any other means.

2. Understanding prevention strategies

Once a formal written complaint is filed, the agency must investigate the complaint to obtain an impartial and appropriate factual record of the situation. This record will be used to determine whether harassment occurred.

Generally, the agency will:

- begin the investigation promptly,
- interview all the individuals and witnesses involved,
- look for corroboration or contradiction,
- record all details confidentially,
- cooperate with investigators,
- consider hiring an external investigator, in some cases,
- communicate the decision to the complainant, and
- enforce disciplinary action.

All employees shall be responsible for acting professionally and refraining from harassing conduct. Any employee who believes he/she has been subjected to harassment in violation of the Agency's anti-harassment policy may elect to file an EEO complaint of harassment with the Office of Equal Employment Opportunity Services (OEEOS) by telephone at (202) 401-3560 or by e-mail at OFO_eeos@ed.gov within forty-five (45) days of the incident. For more information on the EEO complaint process, contact OEEOS staff or visit OEEOS' website.

In accordance with the U.S. Equal Employment Opportunity Commission's regulations and guidelines, and the Administrative Dispute Resolution Act of 1996, ED promotes the wide use of the alternative dispute resolution (ADR) process to resolve workplace disputes or EEO complaints. For additional information on the ADR process, please contact the Office of Finance and Operations, Office of Hearings and Appeals, Alternative Dispute Resolution Center by e-mail at adr_center@ed.gov , or by telephone at (202) 245-7520.

If an employee chooses to report the alleged incident of harassment to his/her manager or supervisor within the chain of command, and/or the alleged harasser's chain of command, the manager/supervisor who became aware of the allegation is required to ensure that the allegations of harassment are addressed swiftly and appropriately, that the allegations of harassment are kept confidential to the greatest extent possible, and that the involved employees and witnesses will be protected from retaliation. The allegation of harassment may be made orally or in writing, and it should contain the name of the alleged harasser, the relevant facts, the date of the incident, and if there were any witnesses.

It is imperative that supervisors and managers take proactive measures to prevent harassment from occurring, and to stop harassment before it becomes severe or pervasive. Managers and supervisors shall contact the agency's Harassment Prevention Coordinator, Workforce Relations Division (WRD), Office of Finance and Operations, by e-mail at EDAnti-HarassmentProgram@ed.gov or by telephone at (202) 664-9521 for internal administrative procedures in addressing allegations of harassment. Every effort will be made to eliminate discrimination and/or harassment in the workplace.

3. Recognizing everyone's roles and responsibilities in preventing sexual harassment

Prevention of Sexual Harassment

Preventing sexual harassment is not just the job of the Personnel or EEO office. It is the responsibility of every member of the agency, including employees, supervisors, managers and senior leaders.

How can you help prevent sexual harassment? By taking a few simple steps:

1. Make sure the agency's policy on sexual harassment is posted where it will remain highly visible and explain it to every employee and new hire under your direction.

2. Watch for the warning signs of sexual harassment, including

• the display of sexually-oriented pictures, objects or written materials
• frequent jokes of a sexual nature
• open use of sexual innuendo or pressure for dates
• routine occurrence of sexually-oriented profanity

Prevention of Sexual Harassment

3. Respond promptly to complaints of sexual harassment by conducting-or asking for the conduct of-a thorough investigation. Take corrective action quickly as appropriate.

4. Clearly inform those engaging in inappropriate or harassing behavior that you find it objectionable, and will not tolerate it.

5. Seek assistance promptly if you are the target of sexual harassment, or observe severe or repeated instances of behavior that you believe qualifies as sexual harassment.

6. Provide refresher training, briefings or reminders periodically to remind all employees of the agency's policy on sexual harassment.

Procedures in Filing an EEO Complaint

Learning Objectives

After completing this topic, you should be able to

- *Understand the basis of EEO complaints and the procedures for filing an EEO complaint (from pre-complaint to formal complaint).*

- *Understand ED's ADR policy and procedures in the EEO process and the benefits of using ADR resources.*

1. Filing EEO Complaints

The EEO complaint process for federal employees and applicants for employment is governed by regulations issued by the EEOC at 29 CFR §1614.

2. Pre-Complaint Procedures

Who May File?

Anyone with an employment relationship - an applicant for employment, an employee, or a former employee of the Department of Education - who believes that he or she has been discriminated against because of race, color, sex (including sexual orientation, transgender status, gender identity, and pregnancy), national origin, religion, age (40 and over), physical or mental disability, genetic information, *political affiliation, marital status, or status as a parent*,* or reprisal for participating in prior EEO activities may file an EEO complaint.

> Note
>
> ****Special Handlings***
> *Generally, charges filed on the basis of marital status, parental status, and political affiliation are not enforced by the EEOC. These cases will be handled somewhat differently. Please contact the agency's EEO office for more information.*

What is the time limit?

A pre-complaint must be filed no later than <u>45 calendar days</u> following an alleged discriminatory incident, act, or event as determined by the effective date of an alleged discriminatory personnel action or the date that the aggrieved person knew, or reasonably should have known, of the event or personnel action.

How to start the process?

To initiate a pre-complaint, you must contact an EEO counselor by contacting the Office of EEO Services (OEEOS) via phone: 202-401-3560; or email: <u>OFO_eeos@ed.gov</u> .

There are two stages of EEO complaints process: pre-complaint and formal complaint.

The Pre-complaint Stage:

At the pre-complaint stage, the aggrieved party (AP) may elect one of the following options:

1. <u>Traditional Counseling</u>: The AP may elect to have an EEO counselor assigned to his/her pre-complaint. An EEO counselor will be assigned to conduct an inquiry and attempts to resolve the matters. If the complaint is not resolved, the EEO Counselor will conduct a final interview within 30 calendar days of the date the matter was brought to his or her attention. If it appears, however, that resolution is possible given more time, AP may agree in writing to extend counseling for an additional period of time, not to exceed 60 calendar days. At the end of the counseling period, the EEO Counselor will provide AP with a notice of the right to file a formal complaint.

2. <u>Alternate Dispute Resolution (ADR)</u>: The AP may elect to use ADR to resolve his/her pre-complaint. The most widely used method in ADR is mediation. Once the election is made, the AP's decision to enter into either process is final with respect to the pre-complaint stage.

The EEO Counselor will handle the pre-complaint processing matters, and many times, may help guide the situation to resolution without the need for a formal complaint. The EEO counselor will:

- ensure the AP realizes his or her rights and responsibilities in the EEO process;
- advise and explain to the AP of the availability of alternative dispute resolution (ADR) possibilities;
- determine the claim and the basis for the claim raised by the potential AP;
- conduct an inquiry on the timeliness of the claim and obtain as much information as possible, in the event the AP decides to file a formal complaint;
- seek and document dispute resolution at the lowest level, and if resolved in counseling;
- advise the AP of his/her right to file a formal complaint if attempts to resolve the situation through EEO counseling or ADR are unsuccessful; and
- prepare a report to document the counseling efforts.

3. Formal Complaint Procedures

The Formal Stage:

Upon receipt of the Notice of Right to File a Formal Complaint, the complainant has <u>15 calendar days</u> to submit a formal complaint in writing to the Agency's EEO office.

1. **Procedural Determination**: If the EEO office determines to accept the complaint, it will refer the accepted issues for investigation. If the EEO office determines to dismiss the complaint in its entirety, it will provide the complainant with instructions for appealing the dismissal.

2. **Investigation**: The agency has 180 calendar days to complete the investigation. That timeframe may be extended up to an additional 90 calendar days with the complainant's consent. Within 30 calendar days upon receipt of the report of investigation and the Notice of Further Rights, the complainant may elect a hearing before an EEOC Administrative Judge or a Final Agency Decision (FAD) based on the record.

3. **Hearing**: If a hearing before an EEOC Administrative Judge is requested, the request must be sent directly to the EEOC field office within 30 calendar days of receipt of the Notice of Further Rights or after 180 calendar days from the filing of a formal complaint, whichever comes first. The complainant is responsible for certifying to the EEOC Administrative Judge that a copy of the hearing request has been sent to the agency's EEO office.

Final Actions by Agency:

Final Order

When an administrative judge has issued a decision, the EEO office shall take final action on the complaint by issuing a final order within 40 calendar days of receipt of the hearing file and the administrative judge's decision.

Final Decisions are to be issued within 60 calendar days of receipt of the complainant's request for a final decision without a hearing. If the complainant does not request a final decision or a final decision with a hearing within the specified timeframe, a final decision will be issued by the agency.

Appeals/Civil Actions:

If the complainant is dissatisfied with the agency's final action (dismissal, final order, or final decision), s/he may file a notice of appeal with the EEOC within 30 calendar days of receipt of the final action or with a Federal District Court within 90 calendar days of receipt.

4. The Use of ADR

ED's ADR Policy

ED is committed to the widest use of alternative dispute resolution (ADR) for resolving EEO conflicts and disputes. The use of ADR in resolving EEO complaints generally leads to a timelier, less costly and less adversarial process than litigation or administrative adjudication. The benefit of early resolution cannot be overstated.

ADR in the EEO Process

Alternative Dispute Resolution (ADR) describes a variety of informal processes for resolving conflicts that emphasize collaborative problem-solving. ADR differs from traditional adjudication methods such as litigation, hearings, and agency administrative processing and appeals in that ADR offers the parties the opportunity for an early, informal resolution of disputes in a mutually satisfactory fashion. ADR usually costs less and uses fewer resources than traditional administrative or adjudicative processes, particularly processes that include a hearing or litigation.

There are a number of other ADR processes, some, but not all are utilized here at ED. These include facilitation, settlement conferences, early neutral evaluation, and/or a combination of these. The ADR processes used most frequently here at ED (e.g., mediation, conciliation, and facilitation) strive to promote better communication between the parties and encourage a respectful and cooperative relationship.

Participation in ADR

The offer of ADR will be decided on a case-by-case basis, by OEEOS, depending on the issues or the situations that may limit the use of ADR. The ADR process at ED is voluntary; however, the Secretary strongly encourages employees, supervisors and managers to learn more about the process and to use it to informally resolve disputes. If a complainant elects to participate in ADR, ED shall provide a management official to participate in the ADR process.

Mediation is an intervention of a third party neutral who has no decision-making authority. The objective is to assist the parties in voluntarily reaching an acceptable resolution. This process only works if both parties agree to participate in "good faith." This means both parties are willing to negotiate, be truthful and listen to each other. The responsibility of the mediator is to help the parties communicate and negotiate with each other to develop their own solutions. Each party will have an uninterrupted chance to explain the situation from their perspective and work with the other side to develop solutions.

In a mediation:
• The only records of the mediated session to be kept will be the Settlement Agreement, if an agreement is reached, and written notice from the ADR analyst/mediator to OEEOS that ADR has

ended.

Information gained during a mediation session cannot be used at a later formal proceeding, nor can a mediator be subpoenaed.

Supplement

Selecting the link title opens the resource in a new browser window.

Note

For more information about ADR services, please contact the agency's ADR Center by email adr_center@ed.gov or by phone at 202-245-7520.

The ADR Center

The Office of Finance and Operations, Office of Hearings and Appeals. Alternative Dispute Resolution Center provides a forum to informally resolve a wide range of workplace disputes, including EEO and grievance related matters in a cooperative, cost-effective, and timely manner. ADR methods encourage participants to have open and honest dialogue, focus on common interests, and use creative problem solving to arrive at their own solutions.

For additional information about the ADR process, please contact the ADR Center by telephone at (202) 245-7520 or by e-mail at ADR_Center@ed.gov .

5. Summary

ADR simply is the best avenue in seeking resolutions of EEO complaints. By electing to participate in ADR, issues can be resolved in a cooperative, cost-effective, and timely manner. Most importantly, the use of ADR methods can help to foster a collaborative organizational culture in which all employees are treated with dignity and respect in support of reaching their full potential and maximizing their contributions to the Department's mission.

Achieving a Model EEO Program and Promoting Diversity, Equity, and Inclusion and Accessibility

Learning Objectives

After completing this topic, you should be able to

- *Understand the framework of a model EEO program pursuant to EEOC MD 715 guidance.*

- *Recognize the requirements of the White House Executive Order 14035 on Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce*

1. Requirements for a Model EEO Program (MD 715)

Pursuant to EEOC Management Directive (MD) 715, the vision of the federal government is to be the Nation's model employer by leveraging diversity and fostering inclusion to deliver the best public service. It is the mission of the Federal Government to recruit, retain and develop a diverse, high-performing federal workforce that draws from all segments of society and values fairness, diversity, equity, inclusion, and accessibility. The primary goal of federal agencies is to serve the American people. The world is getting more complex, social and interconnected, agencies must be poised to harness diversity of thought and leverage it to generate innovative ideas to solve the tough problems they face.

Each federal agency needs to make a concerted effort to create a discrimination free work environment by achieving a model EEO program. There are six essential elements of a model EEO program:

1. Demonstrated Commitment from Agency Leadership
2. Integration of EEO into the Agency's Strategic Mission
3. Management and Program Accountability
4. Proactive Prevention of Unlawful Discrimination
5. Efficiency
6. Responsiveness and Legal Compliance

Demonstrated Leadership Commitment
Agencies must translate equal opportunity into everyday practice and make those principles a fundamental part of agency culture. This commitment to equal opportunity must be embraced by agency leadership and communicated through the ranks from the top down. It is the responsibility of each agency head to take such measures as may be necessary to incorporate the principles of equal employment opportunity into the agency's organizational structure.
To this end, the Secretary of Education issues a series of written policy statements expressing a commitment to equal employment opportunity (EEO) and a workplace free of discriminatory harassment. These statements are published on an annual basis and disseminated to all employees. A copy of the policy statements can be downloaded from the OEEOS website
https://connected.ed.gov/ofo/Pages/Equal-Employment- Opportunity-Services.aspx

Integration of EEO into the Agency's Strategic Mission

In order to **integrate EEO policies into its strategic mission**, each agency should:

- develop a system in which the agency's EEO director can communicate regularly with the agency head and other senior management officials on the status of EEO programs;

- allocate resources to create programs that attempt to eliminate unlawful discrimination;
- involve managers and employees in the implementation of the agency's EEO program activities;
- ensure EEO professionals are involved with, and consulted on, the management and deployment of human resources;
- hire supervisors and managers who have effective managerial and interpersonal skills; and
- educate all employees about federal EEO laws, rights, regulations, and requirements in order to promote best workplace practices.

Proactive Prevention of Unlawful Discrimination

All federal agencies are expected to **proactively prevent unlawful discrimination**, and monitoring progress is an important part of this process.

That means, as part of this on-going obligation, agencies must conduct a self-assessment on at least an annual basis to monitor progress, identify areas where barriers may operate to exclude certain groups and develop strategic plans to eliminate identified barriers. For detailed guidance regarding barrier analysis, please visit www.eeoc.gov or contact OEEOS.

Efficiency

Agencies need to become **efficient and effective in implementing EEO policies** and resolving discrimination and retaliation disputes.

To this end, the agency will:
• Maintain an efficient, fair and impartial complaint resolution process. Identify, monitor and report significant trends reflected in complaint processing activity.
• Establish and encourage the widespread use of a fair alternative dispute resolution (ADR) program that facilitates the early, effective and efficient informal resolution of disputes. Whenever ADR is offered in a particular workplace matter, ensure that managers at all appropriate levels will participate in the ADR process.
• Maintain a personnel database system that collects and maintains accurate information on EEO statistics of workforce demographic data; tracks applicant flow data by race, national origin, sex and disability status; and tracks recruitment activities to permit analyses of these efforts in any examination of potential barriers to equality of opportunity.
• Identify and disseminate best workplace practices.

Management and Program Accountability

A model EEO program will hold managers, supervisors, EEO officials and personnel officers accountable for the effective implementation and management of the agency's program. In ensuring such accountability, the agency must:

• Conduct regular internal audits, on at least an annual basis, to assess the effectiveness and efficiency of the EEO programs and to ascertain whether the agency has made a good faith effort to identify and remove barriers to equality of opportunity in the workplace.
• Establish procedures to prevent all forms of discrimination, including harassment, retaliation and failure to provide reasonable accommodation to qualified individuals with disabilities.
• Evaluate managers and supervisors on efforts to ensure equality of opportunity for all employees.
• Implement effective reasonable accommodation procedures that comply with applicable regulations and EEOC guidance.
• Ensure effective coordination between the agency's EEO programs and related human resource programs.

• Review each finding of discrimination to determine the appropriateness of taking disciplinary action against agency officials involved in the matter. Track these decisions and report trends, issues and problems to agency leadership for appropriate action.

Responsiveness and Legal Compliance

In order to successfully implement **responsiveness and legal compliance** requirements, agencies need to make sure that they are in full compliance with EEO regulations. This includes (1) reporting agency program efforts and accomplishments to EEOC; (2) responding to EEOC directives and orders in accordance with EEOC instructions and time frames; and (3) ensuring that management fully and timely complies with agency final orders and EEOC orders for corrective action and relief in EEO matters.

Question

What are the common practices required in support of the essential elements of a model EEO Program? Match each common practice (from the left side) to the element identified by EEOC (on the right side). Each letter should be used once.

Options:

A. Hiring an HR manager who has been trained in managing a diverse workforce.
B. Recording information such as the race and sex of all job applicants for later analysis.
C. Timely submitting to EEOC an annual report that details the status of discrimination complaints filed against the agency.

Targets:

1. Integration of EEO policies into your agency's strategic mission.
2. Efficient implementation of policies.
3. Responsiveness and legal compliance.

Answer

By employing individuals who have experience or training in interpersonal skills, the agency will be fostering an environment where discrimination and other practices that do not comply with EEO policies can be avoided.

By monitoring applicant data, especially in terms of race, national origin, and sex, agencies are creating systems that evaluate the efficiency with which agencies are implementing EEO principles.

It is required by the EEOC and the No FEAR Act that each agency compiles an annual report that details the complaints brought against the agency each year.

Correct answer(s):

Target 1 = Option A

Target 2 = Option B

Target 3 = Option C

2. Diversity, Equity, Inclusion, and Accessibility

The White House Executive Order 14035

This order, published June 25, 2021, directs executive departments and agencies to develop and implement a more comprehensive, integrated, and strategic focus on diversity, equity, inclusion, and accessibility as a key component of their human resources strategies and identify appropriate practices to improve the effectiveness of each agency's efforts to recruit, hire, promote, retain, develop and train a diverse and inclusive workforce, consistent with merit system principles and applicable law.

1. Diversity is the practice of including the many communities, identities, races, ethnicities, backgrounds, abilities, cultures, religions and beliefs of the American people, including underserved communities.

2. Equity is the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that historically have been denied such treatment.

3. Inclusion is the recognition, appreciation, and use of the talents and skills of employees of all backgrounds and beliefs.

4. Accessibility is the design, construction, development, and maintenance of facilities, information and communication technology, programs, and services so that all people, including people with disabilities, can fully and independently use them.

Diversity brings people with different backgrounds together to integrate ideas that benefit everyone. Inclusion sparks innovation, incorporates fresh approaches, and strengthens institutions where it is practiced. It enriches quality of life and provides well-rounded perspectives in problem solving that encourages the agency to identify better ways of accomplishing its mission. Every ED employee plays a key role in this initiative. By supporting the spirit of Executive Order 14035, we will be one step closer in becoming a model employer of equal opportunity, diversity, equity, inclusion and accessibility.

Question

Executive Order 14035, published on June 25, 2021, directs executive departments and agencies to cultivate a workforce that draws from the full diversity of the Nation, and advances equitable employment opportunities for individuals who are members of underserved communities. As the Nation's largest employer, the Federal Government must be a model for diversity, equity, inclusion and accessibility, where all employees are treated with dignity and respect. The Federal Government must also strengthen its ability to recruit, hire, develop, promote, and retain our Nation's talent and remove barriers to equal opportunity. The Federal Government should have a workplace that reflects the diversity of the American people consistent with merit system principles and applicable law.

Which of the following elements allows the Federal Government to strengthen its abilities and to remove barriers to equal opportunity?

Options:

1. Recruit

2. Hire

3. Develop

4. Promote

5. Retain

Answer

Correct answer(s):

1. Recruit
2. Hire
3. Develop
4. Promote
5. Retain

Question

An underserved community refers to populations sharing a particular characteristic, as well as geographic communities, who have been systematically denied opportunity to participate in aspects of economic, social, and civic life. Underserved communities includes people with disabilities, people of color, individuals in rural communities, first generation professionals, college students, immigrants, formerly incarcerated individuals, older adults, women, individuals facing religious discrimination, veterans, military spouses, parents, caregivers, individuals facing pregnancy discrimination and persons adversely impacted by persistent poverty, discrimination, or inequality.

Options:

1. True
2. False

Answer

Correct answer(s):

1. True

Question

Which of these definitions includes the use of the talents and skills of employees of all backgrounds and beliefs?

Options:

1. Diversity is the practice of including the many communities, identities, races, ethnicities, backgrounds, abilities, cultures, religions and beliefs of the American people, including underserved communities.

2. Equity is the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that historically have been denied such treatment.

3. Inclusion is the recognition, appreciation, and use of the talents and skills of employees of all backgrounds and beliefs.

4. Accessibility is the design, construction, development, and maintenance of facilities, information and communication technology, programs, and services so that all people, including people with disabilities, can fully and independently use them.

Answer

Correct answer(s):

3. Inclusion is the recognition, appreciation, and use of the talents and skills of employees of all backgrounds and beliefs.

Question

On an annual basis, Agency heads must report to the President on the status of the agency's efforts to advance diversity, equity, inclusion and accessibility within the agency and DEIA strategic plan implementation success. This process includes enhancement of diversity, equity, inclusion, and accessibility within the agency, in collaboration with the agency's senior officials consistent with applicable law and merit system principles.

How often must Agency heads report to the President on the status of DEIA within the agency and DEIA strategic plan implementation?

Options:

1. On a weekly basis

2. On a bi-monthly basis

3. On a monthly basis

4. On an annual basis

Answer

Correct answer(s):

4. On an annual basis

3. Summary
Summary of Training Objectives

By completing this training, you have:

• gained the understanding of the legal requirements of EEO laws and the objectives of the agency's EEO program;
• learned to recognize your rights covered by various executive orders, EEO laws, statutes and management directives;
• informed of your right to the EEO process, the 45 calendar days requirement to contact an EEO official for counseling should you believe you have been subjected to discrimination on an illegal basis (such as race, color, national origin, age, sex, religion, disabilities, reprisal, etc.);
• become aware of your role in supporting the ADR program to help resolve any workplace disputes or complaints as fairly and quickly as possible; and
• enhanced your understanding of your roles and responsibilities in the EEO program.

Instructions for Taking the Final Test

You have reached the last page of the course content and will be required to take the final test. There are 8 questions and you must achieve at least 80% to pass.

Upon completion, you will see the final score at the top right corner of the page. You do not need to retake the test if you achieve an overall score of at least 80%. After taking the test, to see the test scores report, select the Skip Test button. As an option, you are welcome to review/retake any modules should you wish to achieve a higher score.

Thank you very much for your effort in completing this training. Your successful completion will be automatically recorded in FedTalent and your supervisor will be informed of your completion via email notification.

Please proceed to the next page to complete the test now.

Tao Calligraphy Healing Field Self-Healing Practices

Your soul has the power to nourish and heal itself.

Dr. & Master Sha's Six Power Techniques

- *Body Power.* Use hand and body positions for focusing energy.
- *Breathing Power.* Use the breath to heal. Inhale deeply through the nose, hold breath for two seconds, then exhale completely through mouth.
- *Mind Power.* Visualize golden light. "Golden light shines" all sickness disappears. Use creative visualization, focus and concentration of the mind.
- *Soul Power.* Say hello to your own soul and to other souls. Request the soul to bless itself.
- *Sound Power.* Chant affirmations and healing mantras with a frequency and vibration for wellness/transformation. What you chant is what you become.
- *Tracing Power.* Write/trace affirmations. Follow the path of the Tao Calligraphy. Chant affirmations or sing healing songs while you trace. Hold fingers and thumb together.

Say Hello Formula

Use the Say Hello® formula to connect with Soul Power for maintaining a healthy and happy life.

Dear Everyone and Everything, I love you and appreciate you. Please join me to uplift our frequency and vibration to be healthier and happier.
I have the power to heal and transform myself.
You have the power to heal and transform yourself.
Together, we have the power to heal and transform the world.

Dear soul mind body of _____ (name one aspect of your life), I love you.
You have the power to heal yourself.
Thank you.

Forgiveness Practice

Forgiveness brings inner joy and inner peace. It is a golden key to living a healthy and happy life.

Dear Everyone and Everything. I love you and appreciate you. Please forgive my family and me for all the mistakes we have made in all our lifetimes. We deeply apologize. Thank you. To all the souls that have hurt my family or me at any time. I forgive you unconditionally. Thank you.

Then chant or sing repeatedly:

I forgive you unconditionally
You forgive me unconditionally
Bring love, peace and harmony
Bring love, peace and harmony

Now sing the healing song *Love, Peace and Harmony* as service to humanity and all souls:

Love Peace Harmony

I love my heart and soul
I love all humanity
Join hearts and souls together
Love, peace and harmony
Love, peace and harmony

Lu La Lu La Li
Lu La Lu La La Li
Lu La Lu La Li Lu La
Lu La Li Lu La
Lu La Li Lu La

Chant or sing sincerely from your heart for 15 minutes. It is recommended to do two 15-minute sessions of Self-Healing Practices each day.

Books

- *Tao Calligraphy Healing Field*
- *Greatest Love* / *Greatest Forgiveness*

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Social Safety Begins with Me, We and Us

LET'S CO-CREATE A SAFE AND INCLUSIVE WORKPLACE

ED IN ACTION SUMMIT - AUGUST 2022

SUZIE CARMACK, PHD, MFA, MED, ERYT 500, NBC-HWC, C-IAYT

DENISE JONES, DEPARTMENT OF EDUCATION

Agenda

1. WELCOME
2. WHAT IS SOCIAL SAFETY
3. POLYVAGAL THEROY & DEI
4. SOCIAL SAFETY AT ED
5. CALLS TO ACTION

Welcome from Your Co-Hosts

Dr. Suzie Carmack

Best-Selling Author, Yoga Therapist, & Consultant

Department Chair and Asst. Professor,
M.S./ C-IAYT Program in Yoga Therapy & Ayurveda
Maryland University of Integrative Health

CEO and Founder, YogaMedCo

Denise Jones

RecognizED Leader

ED Program Manager

Former 8th Grade Teacher

What is Social Safety?

Social Safety Theory hypothesizes that developing and maintaining friendly social bonds is a fundamental organizing principle of human behavior and that threats to social safety are a critical feature of psychological stressors that increase risk for disease.

Central to this formulation is the fact that the human brain and immune system are principally designed to keep the body biologically safe, which they do by continually monitoring and responding to social, physical, and microbial threats in the environment.

Because situations involving social conflict, isolation, devaluation, rejection, and exclusion historically increased risk for physical injury and infection, anticipatory neural-immune reactivity to social threat was likely highly conserved.

This neurocognitive and immunologic ability for humans to symbolically represent and respond to potentially dangerous social situations is ultimately critical for survival.

When sustained, however, this multilevel biological threat response can increase individuals' risk for several inflammation-related disease conditions that dominate present-day morbidity and mortality.

Where Social Safety Lives

Table 1 Individual and collective strategies for promoting social safety and reducing social threat

Intervention	Possible mechanism of action	Example reference(s)
Individual		
Cognitive behavior therapy	Increase social engagement and reduce social threat–related thoughts and beliefs	Clark & Beck 1999, Hofmann & Otto 2017, Shields et al. 2020
Acceptance and commitment therapy	Develop cognitive flexibility to notice, accept, and embrace past social threats	Hayes et al. 2009
Mindfulness meditation	Bring awareness to the present, which is typically absent of social threat	Creswell et al. 2014
Loving-kindness and compassion meditation	Enhance positive emotional states of kindness and compassion toward others	Hofmann et al. 2011
Forgiveness therapy	Reduce negative thoughts and emotions induced by offenders/aggressors	Akhtar & Barlow 2018, Worthington 2013
Self-distancing	Reduce the negativity of past aversive events by increasing distance/perspective	Kross & Ayduk 2017
Stress mindset interventions	View social threat as an enhancing rather than debilitating experience	Crum et al. 2017
Acetaminophen administration	Reduce neurobiological signaling that subserves social pain and rejection	DeWall et al. 2010, Slavich et al. 2019
Safety learning	Remodel neural networks underlying anxiety, fear, and threat	Meyer et al. 2019
Family		
Nurturant parenting training	Strengthen familial relationships	Miller et al. 2014
Family cohesion training	Promote social caring, interpersonal connection, and family cohesion	King et al. 2019
School		
Identity safety interventions	Foster sense that one's identity and values are accepted and welcome	Goyer et al. 2019
Social belonging interventions (a type of identity safety intervention)	Increase social connection, cohesion, belonging, affiliation, and inclusion; reappraise social cues and adversity	Allen et al. 2016, Borman et al. 2019, Patton et al. 2006, Walton & Cohen 2011
Mere belonging interventions	Enhance social connection and belonging with minimal cues and socially shared goals	Gehlbach et al. 2016, Walton et al. 2012
Community/society		
Reduce bias	Decrease instances of prejudice and discrimination	Eberhardt 2019
Prevent bullying	Reduce experiences of social aggression and exclusion	Williams & Nida 2014
Promote social connection	Decrease loneliness and increase social interaction and belonging	Holt-Lunstad et al. 2017
Build empathy	Promote social connection, caring, and empathy toward others	Zaki 2019

A Trauma-Informed Approach

"Trauma is at the heart of diversity, equity, inclusion and accessibility at work because repeated acts of marginalization, oppression and racism are wounds that overwhelms one's ability to cope."
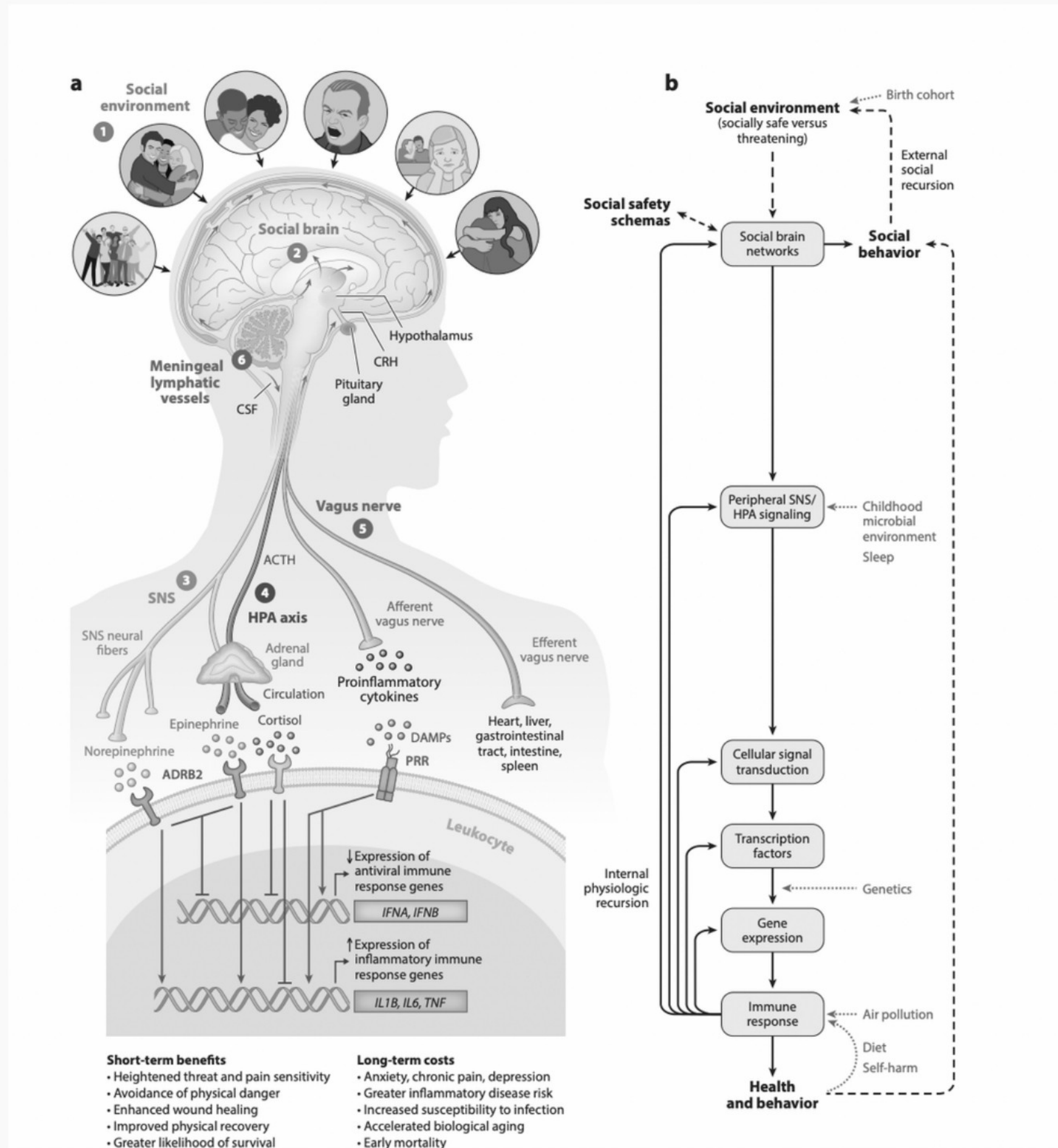
The unseen acts of oppression are the most deeply felt:

- Unintentional acts of exclusion
- Not seeing anyone on leadership that looks like you,
- Bringing up the need for diversity in a meeting and seeing people look away or the room goes silent
- Not receiving credit for an assignment
- Repeatedly being interrupted
- Being called the wrong name
- Being asked about the taste of food from your perceived culture
- Referring to a person of color as articulate
- Being looked over for a promotion
- Feeling the need to stay silent because you feel your opinion is not valued
- Ignoring the everyday realities of being a person of color in America today.

Learn more:
https://www.lauraqc.com/blog/3x67e6gncufahudizwn6hw8j59eibv

**Trauma is Our Reaction To Wounds...
Intended or Unintended."
Dr. Laura Quiros**

Meet Social Safety Theory
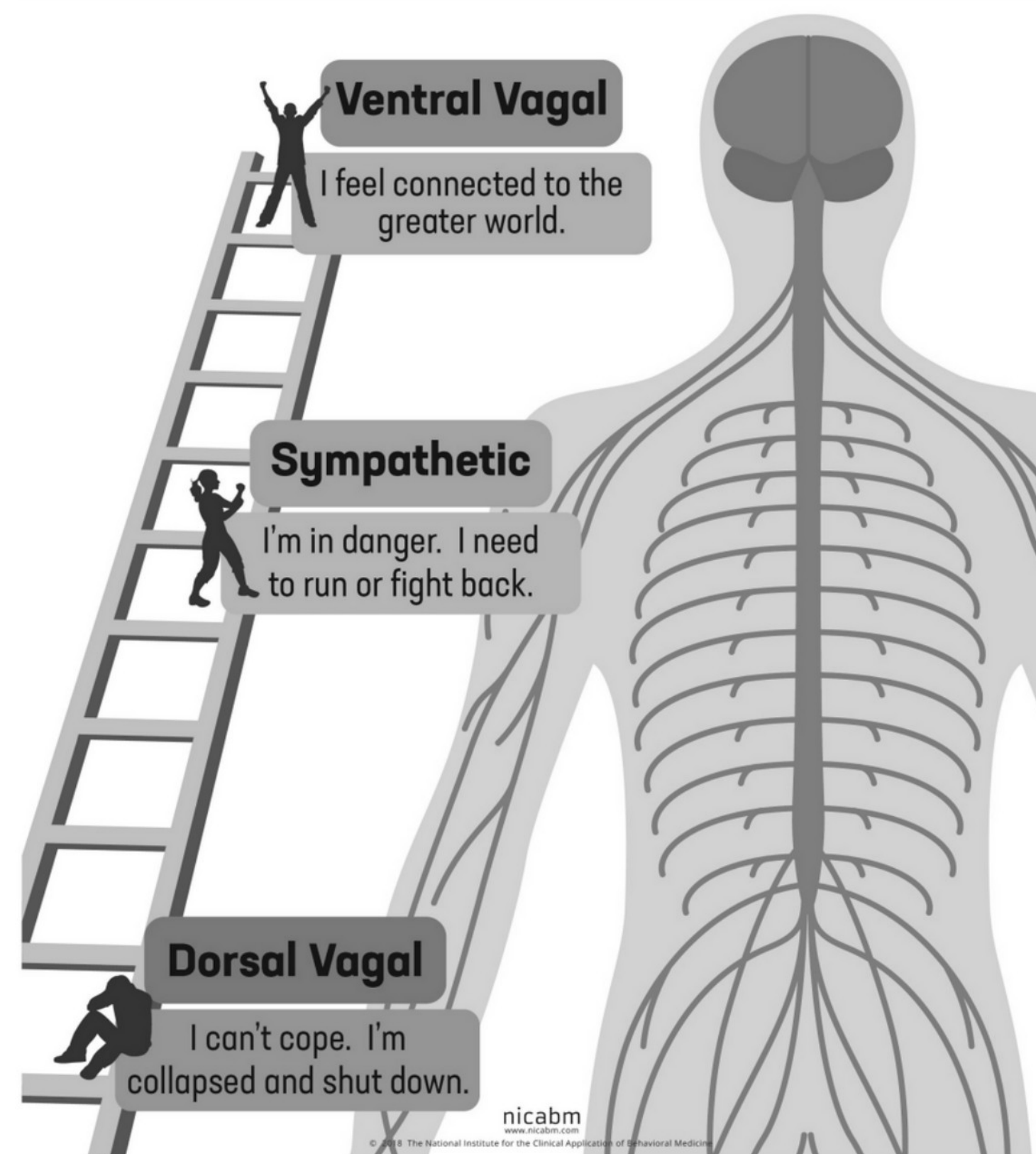
Meet Polyvagal Theory

Trauma skews our ability to scan our environment for danger vs. safety is skewed.

We go into protective mode when we sense danger – because our stress response system is built to respond to our *perception of threat*.

Perception is in the eye of the beholder.

DEIA =
Respecting the perceiver is always right and the power of the individual's lived experience.

Polyvagal Theory: The Autonomic Ladder
Understanding the Nervous System
Adapted from Deb Dana, LCSW

Ventral Vagal
I feel connected to the greater world.

Sympathetic
I'm in danger. I need to run or fight back.

Dorsal Vagal
I can't cope. I'm collapsed and shut down.

nicabm
www.nicabm.com
© 2018 The National Institute for the Clinical Application of Behavioral Medicine

Why Our Scale of Social Safety "Slides"

Meet Neuroception

We breathe without thinking about it...
and we scan our environment for social danger in the same way - without thinking about it.

Polyvagal theory explains how both sides of the vagal nerve - (ventral and dorsal) respond in distinct ways to our environment and social interactions.

- *The ventral (front) side of the vagus nerve responds to cues of safety* in our environment and interactions. It supports feelings of physical safety and being safely emotionally connected to others in our social environment.
- *The dorsal (back) side of the vagus nerve responds to cues of danger.* It pulls us away from connection, out of awareness, and into a state of self-protection. In moments when we might experience a cue of extreme danger, we can shut down and feel frozen, an indication that our dorsal vagal nerve has taken over.

How Yoga Therapy Can Help

"...**mind-body therapies are an effective tool for the regulation of vagal function**...including the mitigation of adverse effects associated with

- social adversity (Black et al., 2013; Cole, 2013; Bower et al., 2014),
- the reduction of allostatic load, and
- the facilitation of self-regulatory skills and resilience of the ANS

"...**mind-body practices can teach the individual to**
- make the VVC [engaged state] more accessible,
- widen the threshold of tolerance to other neural platforms
- change the relationship and response to SNS and DVC neural platforms that occur as natural fluctuations of the BME, and
- **how to become more skilled at moving in and out of these neural platforms**

"**Breathing maneuvers within yoga often facilitate similar shifts in autonomic state with convergent psychological and health consequences**

"**These practices may also contribute to our potential to experience connection** beyond social interactions or networks and to a more universal and unbounded sense of oneness and connection (Porges, 2017).

Learn more:
https://www.frontiersin.org/articles/10.3389/fnhum.2018.00067/full

Let's Practice Together

"Genius Break"

Review

- ✓ WELCOME
- ✓ WHAT IS SOCIAL SAFETY
- ✓ POLYVAGAL THEROY & DEI
- 4 SOCIAL SAFETY AT ED
- 5 CALLS TO ACTION

Social
Safety at Ed
A Poll

The following are the Strategic Core Principles for DEIA at ED. Let's take a poll to discover (anonymously) in real time how you feel ED is really doing.

Principle 1: Committed and engaged leadership

Principle 2: Consistent and demonstrated accountability

Principle 3: Strong, comprehensive, and consistently applied harassment policies

Principle 4: Trusted and accessible complaint procedures

Principle 5: Regular, interactive training tailored to the audience and the organization

Principle 6: Support and assistance to federal employees whose working lives are affected by domestic violence, sexual assault, and stalking (DVSAS)

ME - What Can I Do?

Let's reflect on personal choice-making to sustain a culture of DEIA social safety.

WE - What Can We Do?

Let's brainstorm ideas on what can be done to support DEIA at our team levels.

US - What Can ED Do?

Let's brainstorm ideas for ED senior leadership engagement and culture change.

Calls to Action

Thank You

Dr. Suzie Carmack
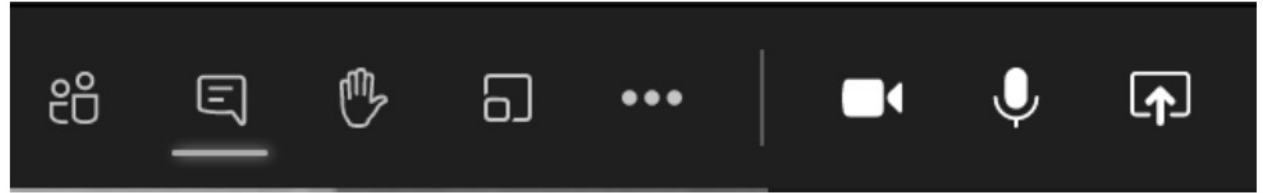Suzie@yogamedco.com

Denise Jones
denise.joseph@ed.gov

Leading a Diverse, Equitable, Inclusive and Accessible Workforce

Presented by the Office of Equal Employment Opportunity Services

February 16, 2022

To Cultivate A Workforce that draws from the full diversity of the Nation

Chat-Box
ICEBREAKER

Which of these do you feel are important to you in a diverse and inclusive environment to be successful?

- My ideas
- My viewpoints
- My background
- My attributes
- My personality
- My uniqueness
- My creativity
- My experiences
- Feeling Valued
- Being accepted and appreciated

Agenda

Diversity Importance to Education

Define Diversity, Equity, Inclusion, Accessibility (Executive Order)

Contrast EO DAY 1 with DEIA Executive Order

Key Components of the DEIA Executive Order

Implementation

Recommendations

Questions

Safe Space - Learning and Growing

1 Be open to new ideas

2 Seek to understand differing views

3 Have a learning mindset

4 Be present

Fulfilling the ED Mission…

To promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.

Dedicated to:

- Establishing policies on federal financial aid for education and distributing as well as monitoring those funds.

- Collecting data on America's schools and disseminating research.

- Focusing national attention on key educational issues.

- Prohibiting discrimination and ensuring equal access to education.

Building a 21st Century Workforce

"For ED to be a high-performing organization in the 21st century, we must have a workplace that reflects the diversity of the American people, ensure equitable practices, and maintain an environment that is inclusive and accessible. We must lead the way to create a positive work environment where all employees can reach their full potential and maximize their contributions to ED's mission."

Secretary's Policy Statement on Diversity, Equity, Inclusion, and Accessibility

"Diversity, Equity, Inclusion and Accessibility are an **integral** part of our daily work."

"ED must set a strong example in the workforce ."

"ED must strive to appreciate, acknowledge and respect differences."

"Be a model for DEIA where all employees are treated with dignity and respect."

"Lead the way to create a positive work environment that is inclusive."

"We recognize that continued success in meeting the needs of our employees requires the full and active participation of all of our staff."

"We all share the responsibility and must reaffirm our commitment to ensure a workplace that is welcoming and make ED the best place to work.

THE SECRETARY OF EDUCATION
WASHINGTON, DC 20202

October 5, 2021

MEMORANDUM TO ALL DEPARTMENT EMPLOYEES

SUBJECT: Policy Statement on Diversity, Equity, Inclusion, and Accessibility

The Policy of the U.S. Department of Education (ED) is to ensure that diversity, equity, inclusion, and accessibility are integral parts of our day-to-day management and work. One of our core missions is to ensure equal access to educational opportunities. In carrying out this mission, we must set a strong example in our own workforce by continuing to acknowledge, appreciate, and respect the differences we recognize in one another.

As a Federal Government employer, we must strive to be a model for diversity, equity, inclusion, and accessibility, where all employees are treated with dignity and respect. Accordingly, we must continue to strengthen our ability to recruit, hire, develop, promote, and retain our Nation's talent and remove barriers to equal opportunity. This includes advancing opportunities for communities that have historically faced employment discrimination and professional barriers. We must also continue to provide the resources to strengthen and advance diversity, equity, inclusion, and accessibility across ED.

Research and evidence show that diverse, equitable, inclusive, and accessible workplaces yield higher-performing organizations. In order for ED to be a high-performing organization in the 21st century, we must have a workplace that reflects the diversity of the American people, ensure equitable practices, and maintain an environment that is inclusive and accessible. We must lead the way to create a positive work environment where all employees have the opportunity to reach their full potential and maximize their contributions to ED's mission. We recognize that continued success in meeting the needs of our employees and customers, including underserved communities both internal and external, requires the full and active participation of all our staff.

All individuals are welcome at ED, regardless of race, color, age, national origin, sex, transgender status, gender identity, sexual orientation, pregnancy, religion, disability, genetic information, marital status, political affiliation, parental status, and those individuals from underserved communities, including formerly incarcerated individuals, or those who have engaged in prior Equal Employment Opportunity activities. Diversity not only complements our organizational values of teamwork, leadership, empowerment, and service quality, but also encompasses the way we work, the work environment, and respect for all people and their ideas.

We all share the responsibility and must reaffirm our commitment to ensure a workplace that is welcoming in ED. I encourage all employees to actively embrace these principles in all that we do to deliver ED's mission and to make ED the best place to work.

Miguel A. Cardona, Ed.D.

ED Diversity and Inclusion Framework

Vision: To be the Nation's model employer by leveraging diversity and fostering inclusion to deliver the best public service.

Mission: To recruit, retain, and develop a diverse high performing Federal workforce that draws from all segments of society and values fairness, diversity and inclusion.

Executive Order 14035 Diversity, Equity, Inclusion and Accessibility in the Federal Workforce

Executive Order 13583 Establishing a Coordinated Government-wide Initiative to Promote Diversity and Inclusion in the Federal Workforce

Department of Education Strategic Plan (2018-2022)
new **2022-2026**
- Engage, develop and inspire a diverse and high-performing workforce
- Implement and maintain effective performance management strategies to support mission objectives

Department Diversity and Inclusion Strategic Plan (2020-2023) (new 2022-2026 DEIA SP)

- Includes the Diversity and Inclusion Framework
- Workforce Diversity
- Workplace Inclusion
- Sustainability (Mission)

Department of Education Policy on Diversity, Equity, Inclusion, and Accessibility

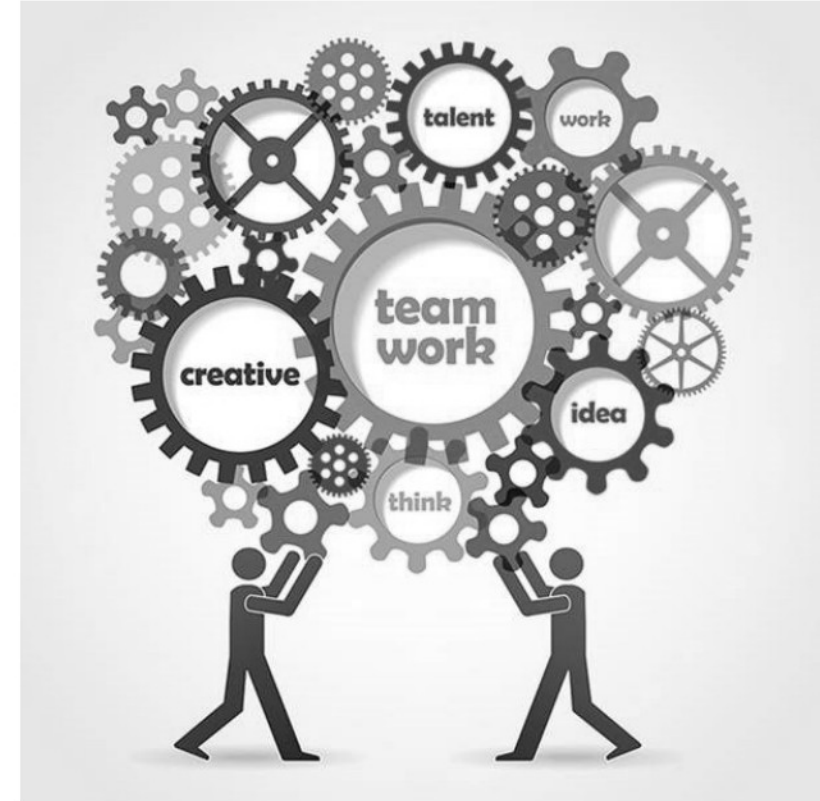# 4 Layers of Diversity
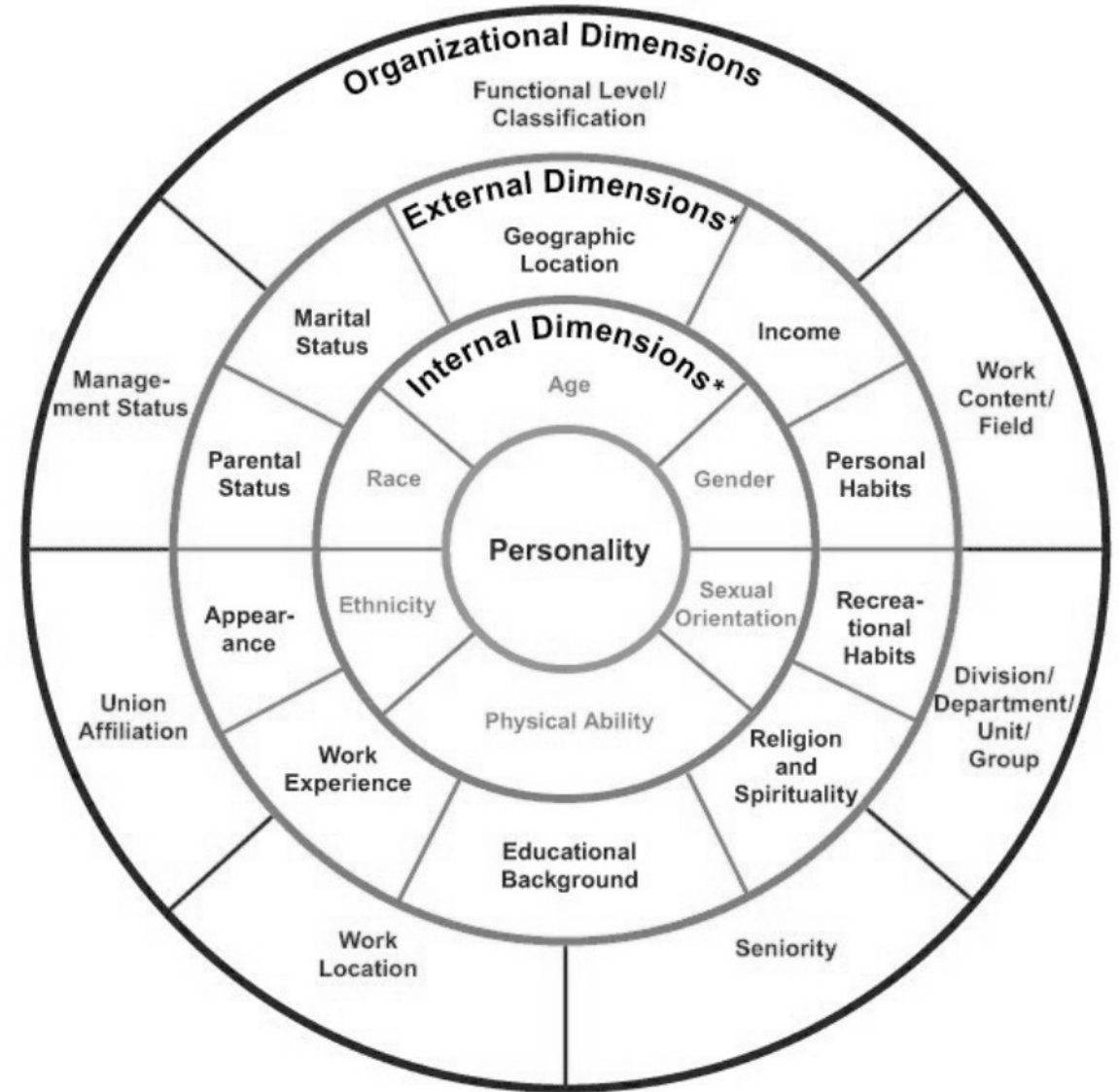
Why Diversity Matters in ED

The Right Thing to Do & Essential for Success

Organizational Policies

Changing Demographics

Inclusive and Productive Environment

Business Case

What is Inclusion?

Uniqueness

＋ →

Inclusion

Belonging

Inclusion is …
A culture that connects each employee to the organization by creating an environment of mutual respect, trust, commitment and fostering a sense of belonging. Having a voice.

Inclusive Leadership Commitment

➢ Inclusive leaders have a **deep sense of fairness**

➢ **Devote time, energy and resources** toward creating a culture of value and belonging; this aligns with their values

➢ **Able to combine** *intellect* (business case for D&I) **with** *emotion* (viewing people as more than resources)

...helping people feel able and safe to be their authentic self

Uniqueness

Belongingness

...helping people feel they are a valued member of the team

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HOW CAN YOU HELP?

…helping people feel able and safe to be their authentic self

Uniqueness

Belongingness

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What Are Executive Orders?

Signed, written, and published directive from the President of the United States that manages operations of the federal government

Executive Orders are not legislative

They require no approval from Congress, and Congress cannot simply overturn them

Executive Orders are subject to judicial review and may be overturned if the orders lack support by statute or the Constitution

Presidential executive orders, once issued, remain in force until they are cancelled, revoked, adjudicated unlawful, or expire on their terms.

President Biden's Executive Orders

Executive Order 13985

Released on January 20, 2021, Executive Order 13985: Advancing Racial Equity and Support for Underserved Communities Through the Federal Government directs federal agencies to evaluate whether their policies produce racially inequitable results when implemented, and to make the necessary changes to ensure underserved communities are properly supported.

Executive Order 13988

Released on January 20, 2021, Executive Order 13988: Preventing and Combating Discrimination on the Basis of Gender Identity or Sexual Orientation expands the discrimination protections previous offered solely on the basis of sex into the categories of gender identity and sexual orientation.

Executive Order 14031

Released on May 28, 2021, Executive Order 14031: Advancing Equity, Justice, and Opportunity for Asian Americans, Native Hawaiians, and Pacific Islanders establishes a White House initiative on Asian Americans, Native Hawaiians, and Pacific Islanders, as well as a Presidential Advisory Commission, both of which aim to advance equity, justice, and opportunity among these groups.

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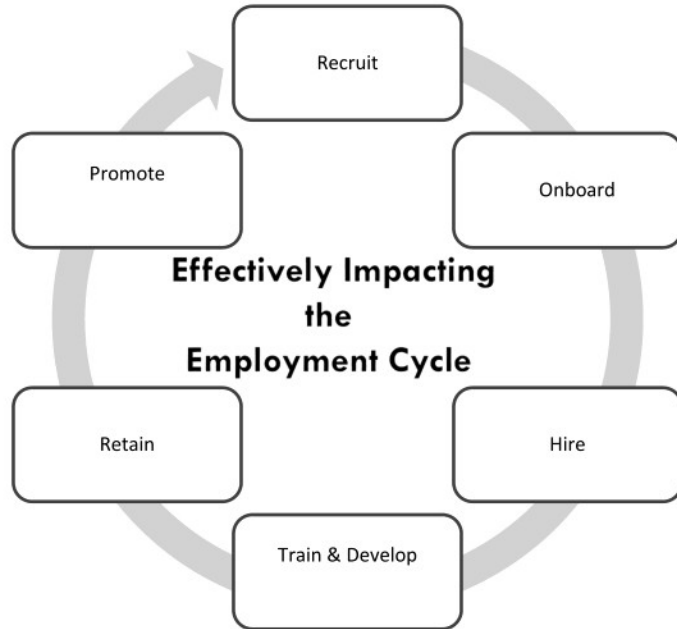
Executive Order 14035
on

Diversity, Equity, Inclusion, Accessibility

EO 14035 Policy Statement

v As the Nation's largest employer, the Federal Government must be a **model** for diversity, equity, inclusion, and accessibility, where all employees are treated with dignity and respect.

v Accordingly, the Federal Government must **strengthen its abi**lity to recruit, hire, develop, promote, and retain our Nation's talent and remove barriers to equal opportunity. It must also **provide resources and opportunities** to strengthen and advance diversity, equity, inclusion, and accessibility across the Federal Government.

v The Federal Government should have a **workforce that reflects the diversity of the American people**. A growing body of evidence demonstrates that diverse, equitable, inclusive, and accessible workplaces yield higher-performing organizations.

Strengthen Abilities to...

Remove Barriers to Equal Opportunity....

Effectively Impacting the Employment Cycle

Recruit
Onboard
Hire
Train & Develop
Retain
Promote

Federal merit system principles include that the Federal Government's recruitment policies should "endeavor to achieve a work force from all segments of society" and that "[a]ll employees and applicants for employment should receive fair and equitable treatment in all aspects of personnel management"

Examples of barriers to equity:

• Burdensome administrative procedures required to access Federal programs

• Historical policies explicitly designed to exclude certain populations

Defining Terms

Diversity: the practice of including the many communities, identities, races, ethnicities, backgrounds, abilities, cultures, religions and beliefs of the American people, including underserved communities.

Equity: the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that historically have been denied such treatment.

Inclusion: the recognition, appreciation, and use of the talents and skills of employees of all backgrounds and beliefs.

Accessibility: the design, construction, development, and maintenance of facilities, information and communication technology, programs, and services so that all people, including people with disabilities, can fully and independently use them.

What is Equity?

"Because advancing equity requires a systematic approach to embedding fairness in decision-making processes, executive departments and agencies must recognize and work to redress inequities in their policies and programs that serve as barrier to equal opportunity."

"The Federal Government's goal in advancing equity is to provide everyone with the opportunity to **reach their full potential.**"
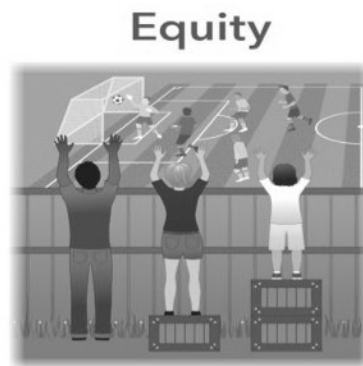
DEFINITIONS: For purpose of the Order:
(a) The term "equity" means the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities…".
(b) The term "underserved communities" refers to populations sharing a particular characteristic, as well as geographic communities, that have been systematically denied a full opportunity to participate in aspects of economic, social, and civic life."

Define Equity

Equity is the fair treatment, **access**, opportunity, and advancement for all people, while at the same time striving to identify and eliminate barriers that have prevented the full participation of some groups. The concept of equity is synonymous with fairness and justice.
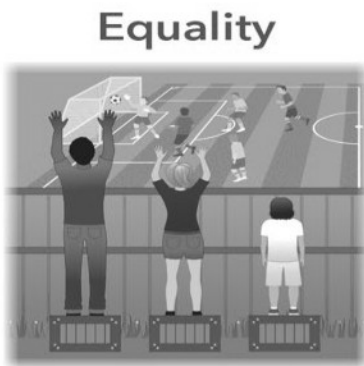
Equality	Equity	Justice	Department
From a holistic view, the assumption is that everyone has access to the same things to see the game. Equality in the workplace doesn't happen if discrimination exists.	Everyone now has a fair, just, and impartial opportunity and with full access to see the game thus achieving equity. Equity required removing the obstacles.	Without the barriers, all three can see the game. Once the root cause is identified and addressed; the systemic barrier is removed and now we have access to the same opportunities to reach their full potential.	Through equity, and social justice, each employee has the access they need because the Department can recognize and work to redress inequities in policies and programs that serve as barriers to equal opportunity.

Historically underserved and under-represented communities

"**Under-served Communities**" refers to populations sharing a particular characteristic, as well as geographic communities, who have been systematically denied opportunity to participate in the aspect of economic, social, and civic life. In the context of the Federal workforce, this term includes those listed here.

- ✓ People of color
- ✓ Individuals in rural communities
- ✓ People with disabilities
- ✓ First generation professionals, college students, and immigrants
- ✓ Formerly incarcerated individuals
- ✓ Persons adversely impacted by persistent poverty, discrimination, or inequality
- ✓ LGBTQ+ individuals
- ✓ Individuals with limited English proficiency
- ✓ Older adults
- ✓ Women
- ✓ Individuals facing religious discrimination
- ✓ Veterans and military spouses and
- ✓ Parents, caregivers, and individuals facing pregnancy discrimination

DEIA: The New DEI

- Addition of the "A" for *accessibility* recognizes that the concept of diversity, equity and inclusion must be broadened to address barriers to equitable *access*, both physical and virtual.
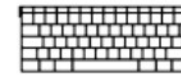
EO 14035

What is Accessibility?

Design of products, devices, services, or environments so people with disabilities can use them unassisted or in a way that's compatible with their preferred assistive technologies.

Section 508 of the Rehabilitation Act of 1973

- Applies to developing, procuring, maintaining, or using electronic and information technology

- Must give people with disabilities comparable access

What is Assistive Technology?

Anything that increases, maintains, or improves the functional capabilities of persons with disabilities

Americans with Disabilities Act

Prohibits discrimination and protects the rights of people with disabilities in public accommodations, jobs, transportation, government services, and telecommunications

Disability Policy in the Federal Government

As the Nation's largest employer, the Federal Government has a singular responsibility to lead by in supporting diversity, equity, inclusion and accessibility for individuals with disabilities in the workforce.

DEIA EO & Day 1 Equity EO

	Equity EO	DEIA EO
Purpose	Affirmatively advancing equity and equal opportunity in the way government serves the American people.	Advancing diversity, equity, inclusion and accessibility in the federal workforce so that it can deliver equitable outcomes.
Outcomes	Agencies can advance equity for underserved communities using principally their **outward-facing** policy and program tools	Agency workforces reflect the diversity of America and can leverage **inward-facing** employment policies and practices to ensure public servants at all levels have an equal opportunity to succeed and lead

Equity

Advancing equity must engage all parts of the agency:

People	Culture	Mission

Diversity, Equity, Inclusion, Accessibility Executive Order	Equity Executive Order

Key Components of the DEIA Executive Order

Whole of Government Approach to DEIA

Government-wide initiative to advance DEIA	• Establishes a government-wide initiative to advance diversity, equity, inclusion, and accessibility in all parts of the Federal workforce led by OPM and OMB, in close partnership with the White House and the EEOC.
100-Day Assessments	• Charges all agencies with assessing within 100 days, the current state of diversity, equity, inclusion and accessibility within their workforces, and identifying any barriers to success faced by employees who are members of underserved communities.
Chief Diversity Officers	• Directs all agencies to look for opportunities to establish senior officials to promote diversity and inclusion within the workforce.
	• Directs all agencies to look for opportunities to establish senior official in the position of Chief Diversity Officer (as distinct from An Equal Employment Opportunity Officer).

Building a Diverse Pipeline Into Public Service

New recruitment partnerships	• Charges the DEIA Initiative (White House, Domestic Policy Council, Office of Management and Budget, and the Office of Personnel Management) with developing recruitment partnerships to ensure that the Federal government can recruit our Nation's best talent.
Federal employment for formerly incarcerated individuals	• Directs the Office of Personnel Management to assess the barriers that formerly incarcerated individuals face when seeking Federal jobs. • Tasks the Office of Personnel Management with considering creating new Hiring Authorities to expand Federal job opportunities for individuals with past convictions.

Organizational Equity Lens (Executive Order 14035)

Promoting Paid Internships	Issue guidance to increase the availability of paid internships, fellowships, and apprenticeships; reduce reliance on unpaid internships and similar programs; and improve outreach to and recruitment of individuals from underserved communities.
Partnerships & Equitable Recruitment	Facilitate the recruitment of individuals who are members of underserved communities for Federal employment opportunities.
Professional Development & Advancement/Training & Learning	Issue guidance for tracking demographic data for professional development programs. Implement/increase DEIA training and issue related guidance and best practices.
Advancing Equity for Employees with Disabilities	Assess current hiring practices, evaluate equity in employment opportunities and financial security, and improve the process for requesting reasonable accommodations.
Advancing Equity for LGBTQ+ Employees	Improve equitable access to employee services and health/medical benefits, update employee identification standards, expand availability of non-binary facilities, and mitigate barriers to security clearance.
Pay Equity	Review government-wide regulations and guidance to address any pay inequities and report recommendations to advance equal pay.

Pay Equity

Fair compensation

- Directs the Office of Personnel Management to review Government-wide regulations and guidance that set pay and wage standards for public servants.

- Directs the Office of Personnel Management to consider taking steps to prohibit agencies from seeking or relying on an applicant's salary history during the hiring process and compensation decisions, an important component of advancing pay equity.

Reduces reliance on unpaid internships

- Reduces the Federal government's reliance on unpaid internships, which can create barriers for low-income students and first-generation professionals.

- Directs key agencies to take steps to reduce the reliance on unpaid internships, fellowships, and apprenticeships to ensure that more Americans can take advantage of these opportunities.

Equity for LGBTQ+ Public Servants

LGBTQ+ public servants

- Directs agencies to ensure that LGBTQ+ employees (including their beneficiaries and their eligible dependents), as well as LGBTQ+ beneficiaries and LGBTQ+ eligible dependents of all Federal employees, have equitable access to healthcare, health insurance coverage, and employee benefits such as long-term care insurance and sick leave.

- Charges all agencies with taking steps to ensure that Federal employees have their gender identities accurately reflected and identified in the workplace, including by exploring opportunities to expand access to gender-neutral facilities inside federal workplaces.

- Charges all agencies with ensuring that their employee support services equitably serve LGBTQ+ employees, including, as appropriate, supportive services for transgender and gender non-conforming and non-binary employees who wish to legally, medically, or socially transition.

Equity for Individuals with Disabilities

Individuals with disabilities

- Charges key agencies with coordinating across the Federal government to ensure that Federal workplaces and technologies are accessible; ensure the process for requesting reasonable accommodations is timely and efficient; and ensure that all Federal employees understand their rights to request reasonable accommodations.

- Directs a review of Schedule A Hiring Authority for individuals with disabilities to assess opportunities to enhance Federal employment opportunities.

- Directs the Secretary of Defense and the Secretary of Labor to take steps, as appropriate, to expand the use of the Workforce Recruitment Program for college students and recent graduates with disabilities.

Equity Focused Training and Development

Professional Development	• Directs agencies to issue guidance to improve the collection of demographic data about which employees are able to access professional development and advancement opportunities to ensure that these programs equitably serve all Federal public servants.
DEIA Training	• Directs all Federal agencies to expand the availability of DEIA trainings for their workforce, so that Federal employees are supported in building skillsets to promote respectful and inclusive workplaces and have increased understanding of implicit and unconscious bias. • These types of trainings equip public servants to best serve the American public, and the many diverse communities that make American strong.

A Safe Workplace

Workplace Harassment	• Requires a government-wide, comprehensive plan to address workplace harassment, including sexual harassment. • The plan will outline policies and practices to prevent, report, respond to, and investigate harassment, and address training, education, and monitoring.

Gender Based Violence	• Requires updated workplace policies to prevent gender-based violence (including domestic violence, stalking, and sexual violence).

Data-Driven Approach to Advancing DEIA

Collection of demographic data

- Charges key agencies with reviewing and improving guidance on the collection of demographic data about Federal employees.

- Directs agencies to take an evidence-based and data-driven approach to determine whether and to what extent agency practices result in inequitable employment outcomes, and whether agency actions may help to overcome barriers.

Government-Wide DEIA Initiative

Domestic Policy Council (DPC)		
Leads	Office of Personnel Management (OPM)	Office of Management and Budget (OMB)
Key Collaborators	Equal Employment Opportunity Commission (EEOC)	Gender Policy Council (GPC)
	National Security Council (NSC)	National Economic Council (NEC)
	Office of Science and Technology Policy (OSTP)	Department of Labor (DOL)
	Presidential Personnel Office (PPO)	White House Counsel (WHCO)

EO 14035 Implementation Team

- ✓ A senior designee from the Secretary's Office
- ✓ Equal Employment Opportunity Director and Diversity and Inclusion Program Manager
- ✓ Chief Human Capital Officer
- ✓ Chief Learning Officer
- ✓ Performance Improvement Officer
- ✓ Agency Equity Team Lead
- ✓ General Counsel
- ✓ Diversity and Inclusion Council Representative Leader
- ✓ An Employee Resource Group and an Affinity Group Leader
- ✓ Agency's lead on workplace safety and sexual harassment policy

In Sum…

Your Support is important to help ED in maintaining an environment that is inclusive

Your ideas and perspectives are welcome as ED prepares its DEIA strategic plan

ED values your support and commitment to the mission

About Diversity   Contact Us   Secretary's Message   Diversity Change Agent Program ▼   D&I Council ▼   D&I Strategic Partnerships ▼   D&I Workforce Demographics ▼

President Biden's Executive Order on Diversity, Equity, Inclusion, and Accessibility (DEIA)

Calendar

There are currently no upcoming events. To add a new event, click "Add new event"

Diversity and Inclusion - Default (ed.gov)

Thank You…

Leading a Diverse, Equitable, Inclusive and Accessible Workforce
May 18, 2022

AUDIO AND VISUAL ARE PROVIDED THROUGH THE MS TEAMS WEBINAR
PLATFORM. THIS PRESENTATION IS ACCESSIBLE (508C)

Which of these reasonate with you for an inclusive workplace?

- My ideas
- My viewpoints
- My background
- My personality
- My unique contributions
- My creativity
- My experiences
- My attributes

- Feeling Valued
- Respect for my abilities and experience
- I have access to equal opportunities
- Being accepted and appreciated
- A feeling of belongingness
- Feeling I can bring my whole self to work

Agenda

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4 Be present

Pathways to fulfilling the ED Mission…

To promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access.

DEIA Mission…

To strengthen and invest in our workforce through a sustained department-wide effort to integrate diversity, equity, inclusion, and accessibility into every aspect of our culture and how we do business.

Building a 21st Century Workforce

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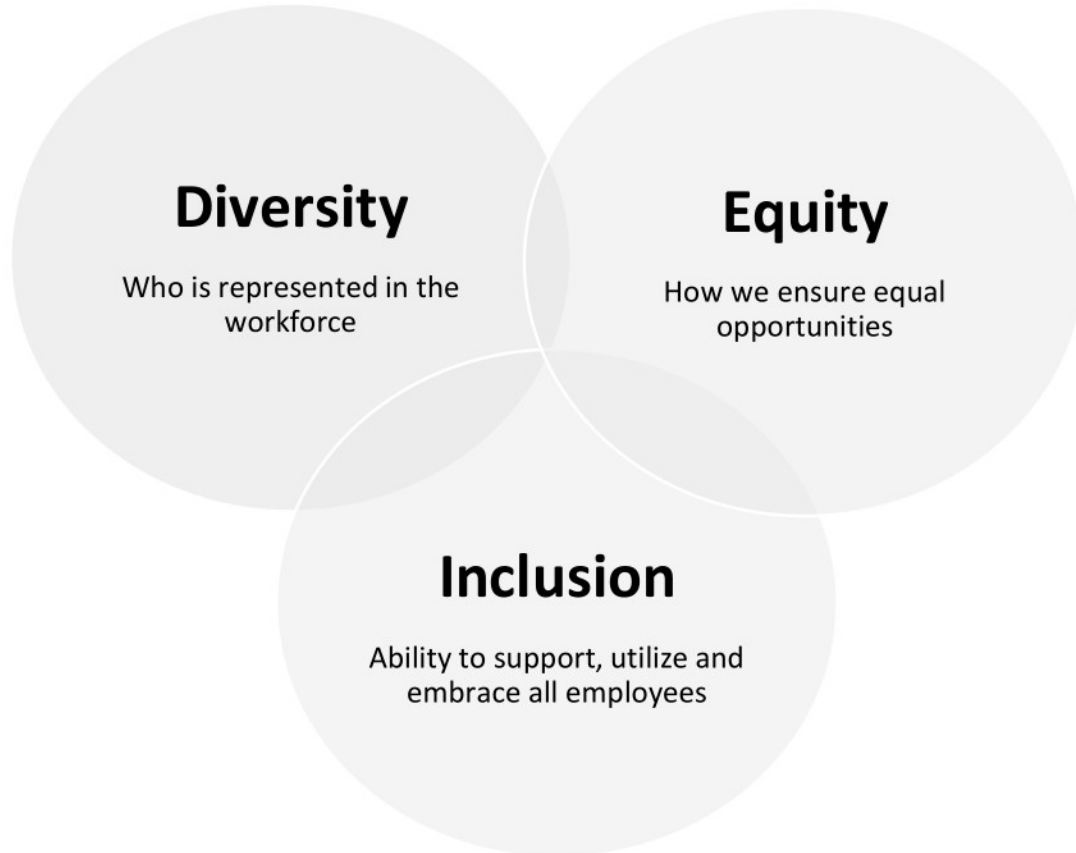
Miguel A. Cardona, Ed.D.

Diversity Defined

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Executive Order 14035

What the Research Shows

Diversity

Who is represented in the workforce

Equity

How we ensure equal opportunities

Inclusion

Ability to support, utilize and embrace all employees

Ethnically diverse companies are 36% more likely to outperform less diverse organizations.

Employees who perceived that their organization offers both opportunity and fairness are 3X more likely to stay and 3X more likely to recommend the company.

Younger employees are almost 2X more likely to raise the need for inclusion and diversity than older employees.

Madsen, S. R. (2020, July 6). Takeaways from "Diversity wins: How inclusion matters" by McKinsey & Company. Diversity Wins 202: 2019 Women in the Workplace research.

What We Know

- In the U.S. population, an estimated one in four Americans has a disability (seen or unseen) DOL

- According to DOL, the current labor force participation rate for people with disabilities is 22.6% compared to those without disabilities at 67.6%

- People with disabilities represent all ages, races, ethnic backgrounds, educational, socio-economic levels and identity factors

- The employment rate of individuals with *targeted disabilities* has the lowest participation rates

What is Equity?

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"The Federal Government's goal in advancing equity is to provide everyone with the opportunity to **reach their full potential.**"

DEFINITIONS: The term "equity" means the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities...".
(a) The term "underserved communities" refers to populations sharing a particular characteristic, as well as geographic communities, that have been systematically denied a full opportunity to participate in aspects of economic, social, and civic life."

Equity Defined

Equity: the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that historically have been denied such treatment.

- Equal opportunity and fairness
- A safe and respectful workplace
- Work-life flexibilities

Strengthen Abilities to...

Remove Barriers to Equal Opportunity….

Recruit

Promote

Onboard

Effectively Impacting the Employment Cycle

Retain

Hire

Train & Develop

Examples of barriers to equity:

- Burdensome administrative procedures required to access Federal programs

- Historical policies explicitly designed to exclude certain populations

Federal merit system principles include that the Federal Government's recruitment policies should "endeavor to achieve a work force from all segments of society" and that "[a]ll employees and applicants for employment should receive fair and equitable treatment in all aspects of personnel management"

Inclusion Is

- The recognition, appreciation and use of the talents and skills of employees of all backgrounds.

- A culture that connects each employee to the organization by creating an environment of mutual respect, trust, commitment and fostering a <u>sense of belonging.</u>

How Diversity & Inclusion Evolve Over Time

Broad
- Requirements-based
- Understand/value differences
- Beyond race, gender, & ethnicity.
- Inclusive culture

Diversity Definition

Narrow
- Discriminated Groups
- Traditional Categories

TIME

Inclusion
- High performance
- Inclusive culture

Diversity
- Organization focus
- Understand/value differences

Affirmative Action
- Eliminate effects of the past
- Target underrepresentation

EEO
- Equal access
- Eliminate discrimination

DRIVERS/SYSTEMS
- Recruiting
- Development
- Training
- Mentorship
- Retention
- Leadership
- Cultural Skills
- Teamwork
- Innovation
- Performance
- Recognition

External Factors ← **Diversity Drivers** → **Internal Factors**

External Factors
- Law
- Societal Pressure
- Work/Life

Internal Factors
- Workplace factors
- Competitive Labor Markets
- Mission Accomplishment

Source:
Defense Business Board Report 03/01/04
(Modified for Ed) modified for ED

Major Characteristics of Inclusive Leaders

Committed	Brave/Courageous	Aware of Biases
Curious	Culturally Competent	Collaborative

Inclusive Leadership: Commitment

Inclusive leaders have a **deep sense of fairness**

Devote time, energy and resources toward creating a culture of value and belonging; this aligns with their values

Able to combine *intellect* (business case for D&I) **with *emotion*** (viewing people as more than resources)

Inclusive Leadership: Bravery/Courage

Inclusive leaders:

- **Challenge** entrenched cultures and accepted thinking/practices
- **Act** on their convictions and principles (personal risk-taking)
- **Recognize** their limitations and seek feedback to overcome those limitations
- **Admit to and learn from** mistakes
- Hold themselves and others
- **accountable**

Inclusive Leadership: Aware of Biases

Inclusive leaders know:

Biases inhibit objective decision-making; and

Promote self-cloning

Not sharing authority, power or credit is discouraging and damages relationships

They make an effort to:

Set aside their personal interests and agendas

ID their own biases to prevent them from influencing decision-making

Develop and implement policies/processes to prevent organizational biases

Inclusive Leadership: Curious

Inclusive leaders are lifelong learners

Open-minded

Like to be exposed to new/different things and ideas

Get bored with the status quo

Want to know about others

Set stretch goals for themselves and others

Seek to improve themselves (always evolving)

Engage in respectful questioning

Refrain from making fast judgments

Inclusive Leadership: Culturally Competent

Inclusive leaders are culturally intelligent and promote cultural competence by:

- Demonstrating self awareness of their own culture and perceptions of it by others
- Learning about other cultures
- Practicing the ability to understand, communicate with and effectively interact with people of other cultures

Are aware of how stereotypes can be a negative influence and seek to learn and share their knowledge with others

Inclusive Leadership: Collaborative

❑ Inclusive leaders can work through and with others to achieve goals by:

- **Communicating** clearly, often and in a timely manner
- **Empowering and developing** others
- **Unifying** individuals by creating a group identity and shared goals
- **Creating line-of-sight** to provide purpose and meaning
- **Understanding** how different thinkers respond to change and mitigating negative emotions
- **Devising intentional opportunities** for creativity/innovation

Ways to Become an Inclusive Leader (con't)

- ***Intentionally* connect with others**

  - Invite coworkers out for coffee or lunch
  - Offer to listen, without judgment, to a problem, situation or story
  - Encourage someone with a compliment or affirmation
  - Leave a thank you note
  - Leverage humor
  - Create opportunities for brainstorming and creativity

Ways to Become an Inclusive Leader (con't)

- **Learn about people, places, customs and cultures that differ from your own**

  - Join an Employee Resource Group (ERG) or Affinity Group
  - Participate in Special Emphasis Month observances
  - Make an effort to understand about the challenges, successes and contributions of other communities
  - Watch foreign-language television shows for films, or listen to music from around the world
  - Study a new language (start with basic phrasing)

Create an Inclusive Culture

Daily check in with all members

Mentor people who are different from you

Open dialogue in your teams to identify and address subjectivity, transparency, behavior on a consistent basis.

Make questioning a part of all team meetings, make it part of your "way of doing things."

What is Accessibility?

Accessibility: is the design, construction, development, and maintenance of facilities, information and communication technology, programs, and services so that all people, including people with disabilities, can fully and independently use them.

DEIA: Addition of the "*A*" for *accessibility* recognizes that the concept of diversity, equity and inclusion must be broadened to address barriers to equitable *access*, both **physical and virtual.**

Key Definitions

What is a disability?

According to the ADA, an individual is disabled if:

- Has a physical or mental impairment that substantially limits one or more major life activities
- Has a record of such an impairment
- Is regarded as having a disability

ADAAA expands the definition to include:

- Bodily functions as a major life activity
- Health conditions that are episodic or in remission

Perception Differences

The perception of people with disabilities is vital for full inclusion.

Some differences are apparent across disability categories and can include:

- Veterans who sustained disabling conditions in combat and view themselves as wounded warriors

- Individuals with ADA covered impairments who are often unaware that their medical conditions may rise to the level of ADA defined disability

- Those with non-visible disabilities that are reluctant to disclose their impairments for privacy reasons, concerns about not getting hired, or due to possible stigma

Source: The National Institutes of Health

Know: The Laws and Policies

Americans with Disabilities Act

Prohibits discrimination and protects the rights of people with disabilities in public accommodations, jobs, transportation, government services, and telecommunications.

Rehabilitation Act of 1973

The Rehabilitation Act of 1973 protects people with disabilities in America. The most well known is Section 504 (no federal agency can discriminate against a disabled person).

The Intangible Benefits Of Working As a Public Servant

Trust **Respect** **Collaboration** **Creativity** **Innovation** **Engagement**
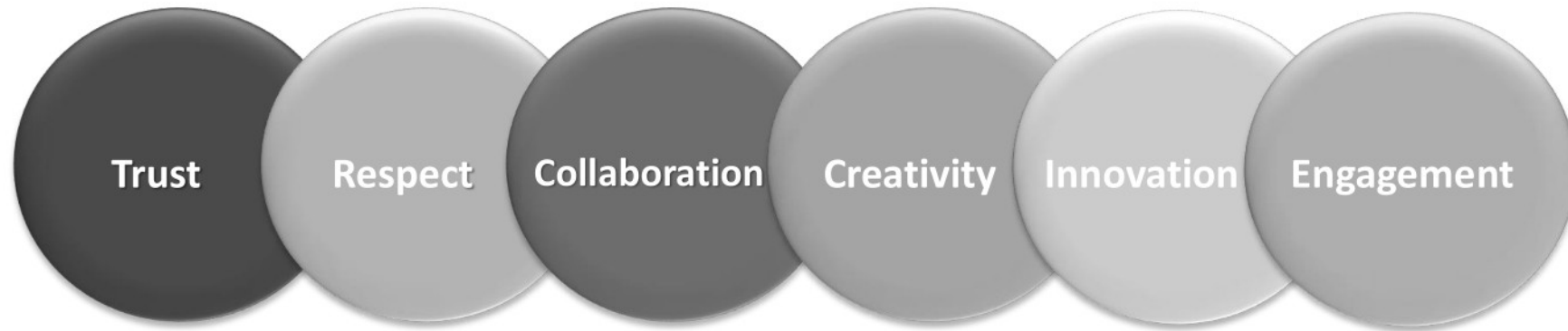
We create a culture where employees feel valued in an inclusive environment.

President Biden's Executive Orders

Executive Order 13985

Released on January 20, 2021, Executive Order 13985: Advancing Racial Equity and Support for Underserved Communities Through the Federal Government directs federal agencies to evaluate whether their policies produce racially inequitable results when implemented, and to make the necessary changes to ensure underserved communities are properly supported.

Executive Order 13988

Released on January 20, 2021, Executive Order 13988: Preventing and Combating Discrimination on the Basis of Gender Identity or Sexual Orientation expands the discrimination protections previous offered solely on the basis of sex into the categories of gender identity and sexual orientation.

Executive Order 14031

Released on May 28, 2021, Executive Order 14031: Advancing Equity, Justice, and Opportunity for Asian Americans, Native Hawaiians, and Pacific Islanders establishes a White House initiative on Asian Americans, Native Hawaiians, and Pacific Islanders, as well as a Presidential Advisory Commission, both of which aim to advance equity, justice, and opportunity among these groups.

Executive Order 14035

On June 25, 2021, President Biden released Executive Order 14035: Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce. This executive order seeks to create a Government-wide initiative to promote diversity, equity, inclusion, and accessibility (DEIA).

President Biden's Executive Orders

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Executive Order 14035
on

Diversity, Equity, Inclusion, Accessibility

EO 14035 Policy Statement

- As the Nation's largest employer, the Federal Government must be a **model** for diversity, equity, inclusion, and accessibility, where all employees are treated with dignity and respect.

- Accordingly, the Federal Government must **strengthen its abi**lity to recruit, hire, develop, promote, and retain our Nation's talent and remove barriers to equal opportunity. It must also **provide resources and opportunities** to strengthen and advance diversity, equity, inclusion, and accessibility across the Federal Government.

- The Federal Government should have a **workforce that reflects the diversity of the American people**. A growing body of evidence demonstrates that diverse, equitable, inclusive, and accessible workplaces yield higher-performing organizations.

The Government-wide DEIA Plan

This Government-wide Strategic Plan to Advance DEIA in the Federal Workforce (or Governmentwide DEIA Plan) offers a roadmap for implementing the Executive Order and lays out key steps agencies can take to strengthen DEIA in their workforce policies, practices, and culture. The Government-wide DEIA Plan:

- o Provides vision and mission statements
- o Established five operating principles to advance and sustain DEIA within agencies
- o Further outlines the DEIA priorities expressed in the EO
- o Details strategies for advancing DEIA
- o Provides and examples maturity model to support growth
- o Outlines steps to create a comprehensive framework to address workplace harassment
- o Explains next steps for advancing DEIA

Department of Education ED In Action Summit

August 3, 2022

U.S. Department of Education

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Welcome to the
ED In Action Summit: Drivers of Diversity

The Summit Welcome will begin today at 11:00am ET.

Links to each workshop are in the MS Outlook Calendar invitation and on connected.ed.gov/Pages/ed-in-action-summit.aspx.

If you want to ask a question during a workshop, use the chat function **OR** email Equity_Diversity_Inclusion_Accessibility_Summit@ed.gov

Program materials will be accessible on connectED.ed.gov and recordings will be made available on FedTalent.

We appreciate you completing the **ED In Action** Feedback form.

Thank you and we hope you enjoy today's Summit!

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Disclaimer

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Trauma-Informed Workplace Necessary for Inclusion and Diversity

Trauma-Informed Workplace Necessary for Inclusion and Diversity

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Presenters:

Dr. Eustache E Jean-Louis
Perspective Historical & Context

Dr. Marie Remy-Dubois
Perspective Behavioral
Assess, Intervention & Monitor

Maryse Emmanuel-Garcy, LMSW
Social Perspective

Melanie Johnson
SAC AND FOX Nation of Oklahoma

Objective:

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To provide a cultural approach that addresses trauma and trauma informed care in diverse, minority and multi-ethnic populations.

Addressing Trauma Informed Care: Perspective Historical & Context

Dr. Eustache E. Jean-Louis MD, MPH
Senior Program Consultant at Health & Social Matrix – Boston University School of Public Health

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Trauma Definition:

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Any event that overwhelms a person's capacity to cope and that can have long lasting impact on them

(APA) Definition:

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Trauma as exposure to actual or threatened death, serious injury or sexual violence

Federal Health Definition:

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Substance abuse and mental health service administration (SAMHSA) states that individual trauma results from an **EVENT**, a series of events or set of circumstances that is **EXPERIENCED** by an individual as physically or emotionally harmful or threatening and that has lasting adverse **EFFECTS** on functioning and physical, social, emotional, or spiritual well-being

Historical Context :

History matters in all human events in one's lifetime

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Other Influential Trauma Context :

1. Language
2. Diversity
3. Religion

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Context can be:

1. Earthquake
2. Car Accident
3. Pandemic
4. Lost of loved ones due to substance or dreadful cancer
5. Many more events...

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As teachers, managers in education four (4) key components must be factor in:

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1. **How well you understand the history of trauma related to current event not specifically clinical**

2. **Remember, Trauma is a team not individual approach. It requires collective strategy to resolve present and future side effects involving other human or provider resources**

3. **What can I do to ameliorate the presenting situation?**

4. **Do your part! Action (i.e; update policy, annual training, specific guest speakers on relevant topics**

Addressing Trauma Informed Care: Perspective Behavior
Assess, Intervention & Monitor

Marie Remy-Dubois, DNP, FNP-C, PMHNP-BC
Owner & Medical Director of Connect Healthcare Services
Psychiatric Nurse Practitioner at Port Saint Lucie Behavioral Hospital

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What is Trauma Informed Care:

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A strengths-based approach that stresses physical, psychological, and emotional safety for both caregivers and survivors and is based on a knowledge of and sensitivity to the effects of trauma provides opportunity for survivors to regain control and a sense of empowerment

Assessment:

1. Be able to screen and or recognize trauma
2. Emotional reactions (Acute or Late)
3. Physical Symptoms
4. Cognitive reactions

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Behavioral Interventions:

1. Must be culturally appropriate
2. Safety
3. Trust
4. Language
5. Religion
6. Support

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Ongoing Monitoring/QA:

1. Staff training
2. Employer support
3. Peer support
4. Appropriate referral
5. EAP

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Addressing Trauma Informed Care: Sociocultural Perspective

Maryse Lamercie Emmanuel-Garcy, LMSW
Author of "Our Mental Health Matters, An Intergenerational
Conversation- YON TI PALE- Through Our cultural Lens

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Trauma: A reality in our lives

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➢ **Throughout time, trauma has been an ongoing reality in our lives. We might agree that most of us, as human beings had a traumatic experience. Still, those traumatic events affect us in different ways.**

➢ **Collective Experience**

➢ **Individual Experience**

Impact of culture

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➢ **Culture - Symbolic meanings that are shared among members of a society. A way of life, values, behaviors, norms that govern interactions among members or between members and outsiders (J. F. Longres)**

➢ **Cultural implications - The cultural iceberg model developed by Edward T. Hall**

A win win situation

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- ➢ **Benefits of effective trauma management in the workplace**
- ➢ **Trauma shapes us but doesn't define us.**
- ➢ **Resilience is a powerful muscle we can build together.**

Addressing Trauma Informed Care: From a Cultural Perspective

Melanie Johnson, (Sac and Fox Nation of Oklahoma)
NIEA Whole Child Initiative Director

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WHO IS NIEA?

OUR MISSION

The National Indian Education Association advances comprehensive, culture-based educational opportunities for American Indians, Alaska Natives, and Native Hawaiians.
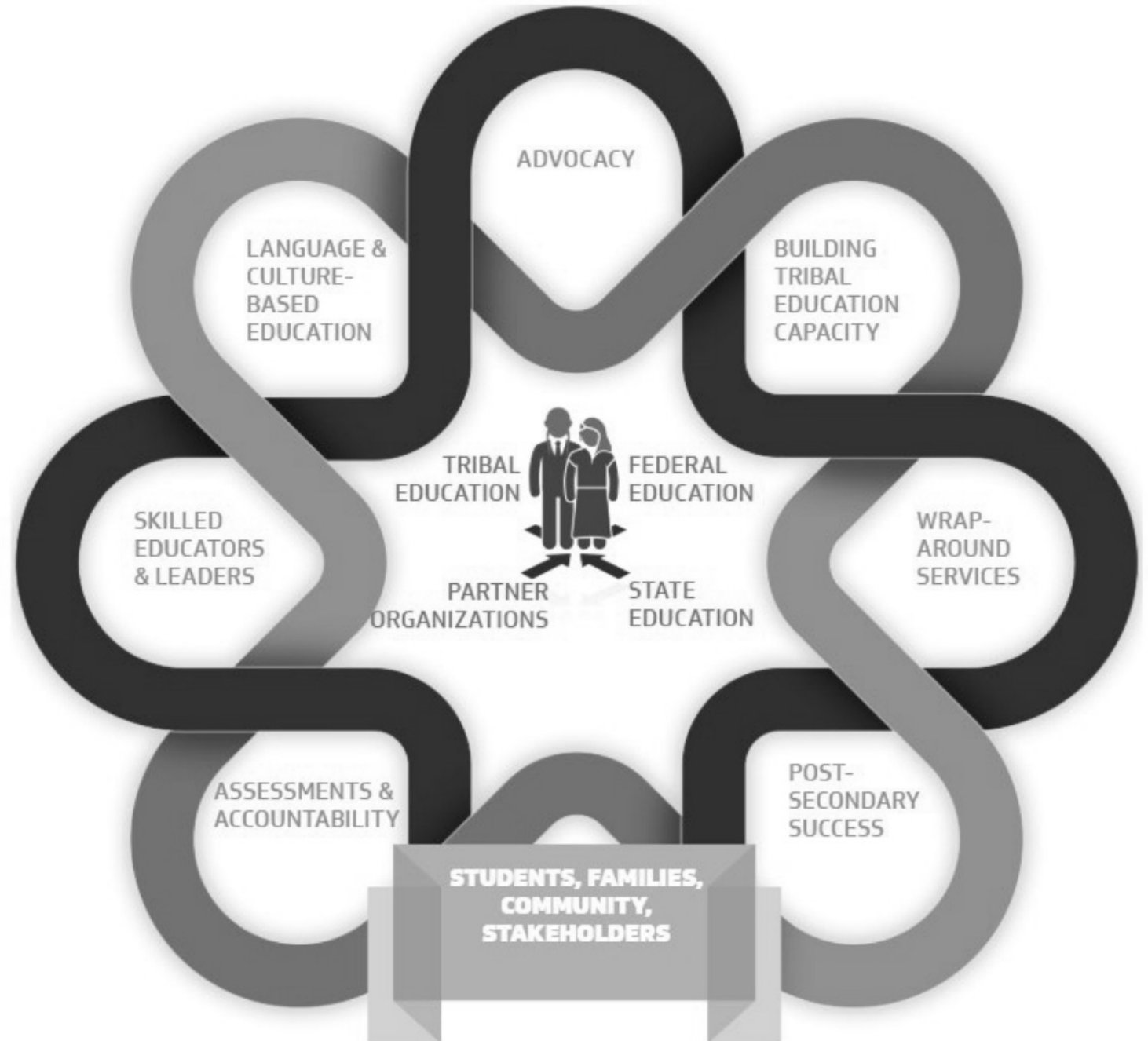
Trauma Related Work Topics

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➢ **Federal Indian policy**

➢ **Knowing the layers of historical trauma inflicted under federal policies**

➢ **Understanding the relationship between federal Indian policies and the consequences for Native people**

➢ **Understanding that cultural traumas are created when attempts are made to eradicate part or all of a culture or people**

➢ **Discussing how representation in the classroom can help or hinder the identity growth and learning of Native (and all) students**

The Role That Trauma Plays In Native Staff

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➢ **Colonization**

➢ **Oppression**

➢ **Historical Trauma**

➢ **Lateral Violence**

Understand & Define the "Why" of Trauma

- **What is oppression?** unfair, unjust treatment for purposes of control, authority or power.

- **What is colonization?** In the context of Indigenous Peoples, colonization has come to mean any kind of external control, and it is used as an expression for the subordination of Indian peoples and their rights since early contact with Europeans.

- **What is historical trauma?** for AI/AN it is a collective, cumulative emotional wounding across generations resulting from genocide and colonization. Ex: forced relocation, boarding schools, loss of culture/language, forced to adhere to European ways of life; it can be personal and collective (those that have not directly experienced the trauma can feel the effects and can manifest it from generation to generation).

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Understand & Define the "Why" of Trauma

Lateral violence is a form of bullying, and can often be called horizontal violence, which has been defined as "organized, harmful behaviors that **we do to each other collectively** as part of an oppressed group, within our families, within our organizations and within our communities."

NIEA Trauma Work

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- **BUILDING TRAUMA INFORMED CLASSROOMS** – Deepens the understanding of the landscape of trauma and its effects on the brain, learn about skill acquisition and trauma resiliency, and discuss trauma skilled strategies for native students.

- **BOARDING SCHOOL HEALING** – Educator Professional Development: Recognizing Boarding School Era Historical Trauma - provide educators with the best possible tools to meet the unique social, emotional, and academic needs of Native students and to imbue in teachers culturally and historically accurate knowledge to ensure that they can create a positive and safe learning environment.

NIEA Trauma Work

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- **INDIGENOUS EMPOWERMENT & RESILIENCE TRAINING** also known as the KAIROS Blanket Exercise - he KAIROS Blanket Exercise program is a unique, participatory history lesson — developed in collaboration with Indigenous Elders, knowledge keepers and educators — that fosters truth, understanding, respect and reconciliation among Indigenous and non-indigenous peoples.

- **WHOLE CHILD INITIATIVE** – In Development

NIEA Trauma Community

What Broke Apart Our Indian World

GOSSIP & JEALOUSY
ALCOHOLISM
LOSS OF CULTURE LANGUAGE RITUALS
MISUSE OF TOBACCO
INDIAN WORLD
LAND LOSS
BOARDING SCHOOL
GAMBLING
MEDIA
ADDICTIONS F.A.S/F.A.E. METH
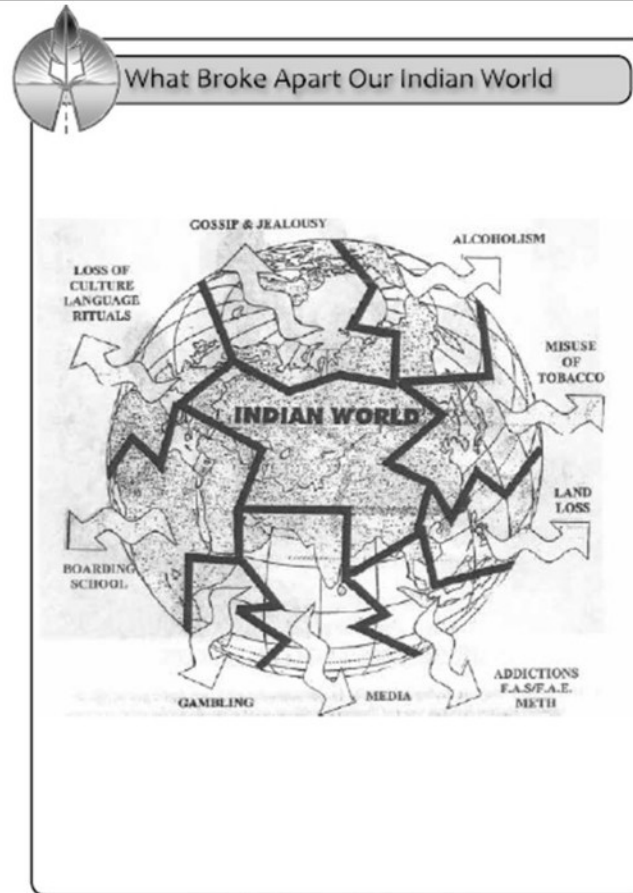
Native Wellness Institute

LEGACY OF HISTORICAL TRAUMA

- *EPIGENETICS*

- Study finds trauma effects may linger in body chemistry of next generation:

- "children of Holocaust survivors…could be more likely to develop stress or anxiety disorders."

- Study by RACHEL YEHUDA, ICAHN SCHOOL OF MEDICINE AT MT. SINAI

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REALITY OF INTERGENERATIONAL TRAUMA

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Defined: Traumatic event(s) that began years before the current generation and impacts the ways in which individuals within a family understand, cope with, and heal from that and other trauma.

Intergenerational trauma can result from:

- Unresolved emotions/thoughts about a traumatic event
- Repetition of negative behavior including beliefs about parenting
- Substance abuse or severe mental illness
- Poor parent-child relationships and emotional attachment
- Complicated personality traits or disorders
- Blind acceptance with how the family has coped

MULTIGENERATIONAL TRAUMA MODEL
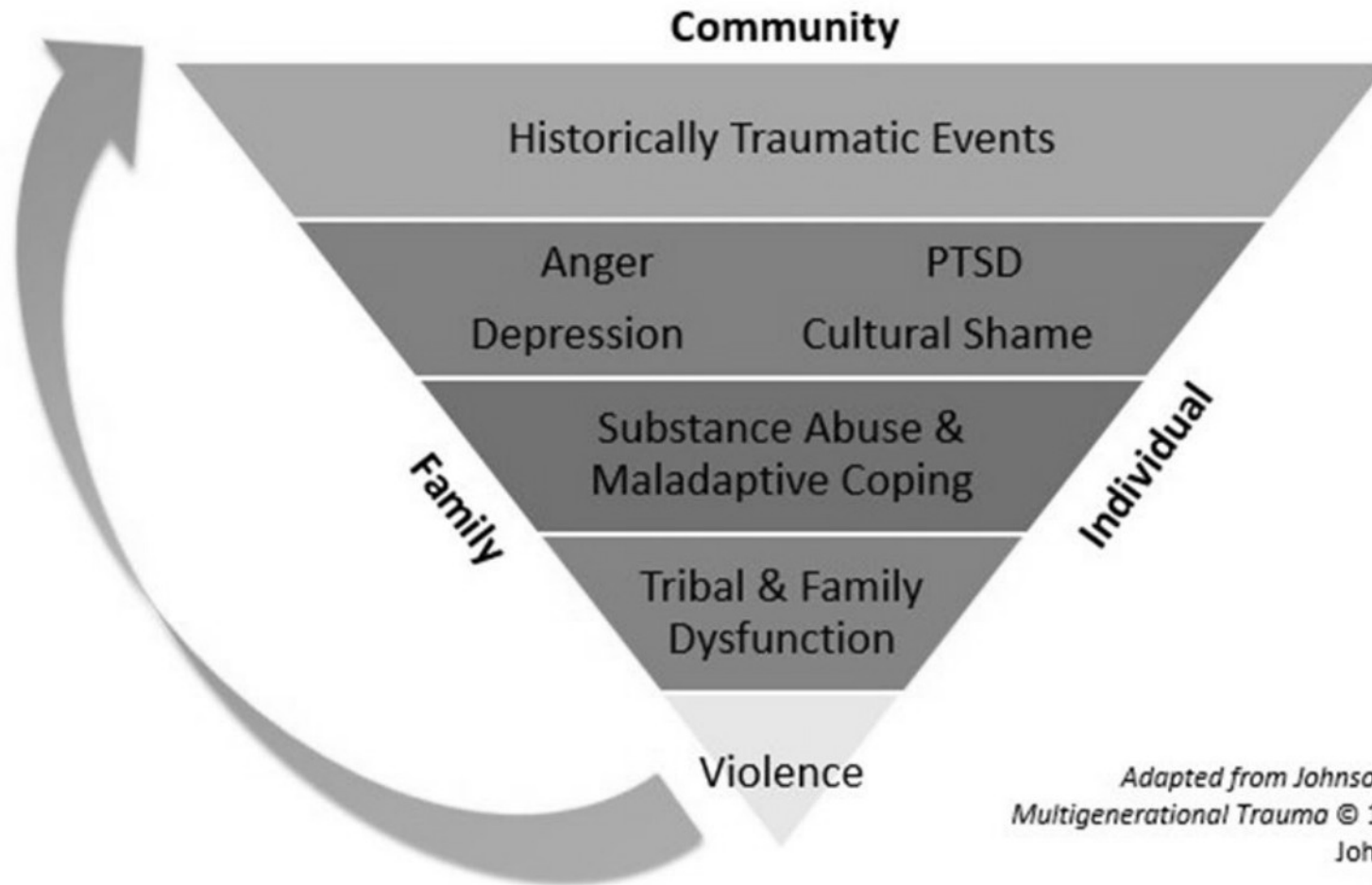
Adapted from Johnson Model of
Multigenerational Trauma © 1998 Carrie
Johnson, PhD.

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The Importance of Having a Trauma Informed Workplace

NIEA recognizes trauma and is working on ways to address both individual as well as the workplace. There is still much work to be done.

One strategy is to participate in trainings from Native Wellness.

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The Importance of Having a Trauma Informed Workplace

Trauma Informed will help to reduce the toxicity in the workplace. We all have different expectations when we approach our work.
Show grace. If the problems at work can be fixed, then nothing to worry about, just know it will be ok.
Patience is key.

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The Importance of Having a Trauma Informed Workplace cont.

Wellness in the Workplace
Native Wellness offers a training to address unhealthy behaviors in the workplace. The interactive training will take participants on a journey of personal and workplace wellness with skills and tools to be more positive, proactive and productive employees.
https://www.nativewellness.com/services.html

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What an Organization can do to respond to Trauma in the workplace

Gathering of Native Americans Training also known as GONA – A GONA is a culture-based planning process where community members gather to address community-identified issues.
It uses an interactive approach that empowers and supports AI/AN tribes. The GONA approach reflects AI/AN cultural values, traditions, and spiritual practices.
https://www.nativewellness.com/services.html

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What an Organization Can Do to Respond to Trauma in the Workplace

Lifting Hearts off the Ground Readings, by Lyla June Johnston, Joy De Vito – For Healing and Life - The United Nations Declaration on the Rights of Indigenous Peoples is a powerful proclamation of the principles that should guide Indigenous-Settler relations around the world. Some call it a blueprint for reconciliation. Some say that, if taken seriously, it could help states and Settler societies repair significant historic injustices and reject present colonialism. Yet as a legal text, it's not the easiest document to read or to imagine into action.

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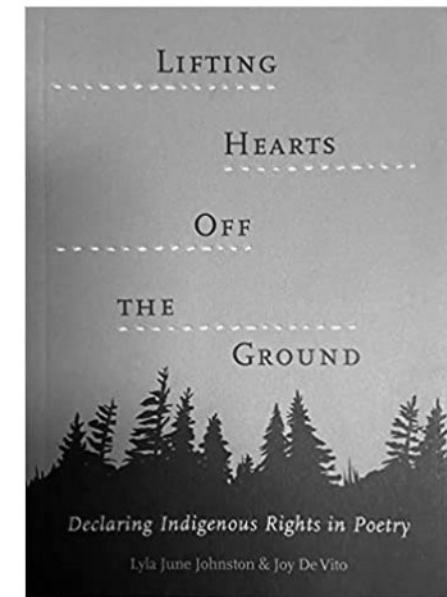
What an Organization Can Do to Respond to Trauma in the Workplace cont.

Lifting Hearts off the Ground Readings, by Lyla June Johnston, Joy De Vito – For Healing and Life - In Lifting Hearts Off the Ground, two poets — one Indigenous, one Settler — come together to breathe life into the seemingly dry bones of the Declaration. And as we contemplate, wrestle with, and pray their words, we discover an invitation to renewed relationships with each other, the land, and Spirit.

LIFTING
HEARTS
OFF
THE
GROUND

Declaring Indigenous Rights in Poetry
Lyla June Johnston & Joy De Vito

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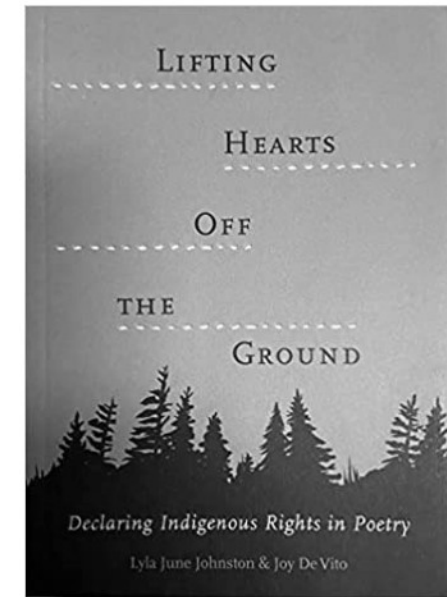
What an Organization Can Do to Respond to Trauma in the Workplace

Ketepi!

Thank You

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CONTACT US (niea@niea.org)

@WereNIEA   NIEAFanPage   @niea1969   www.niea.org | 202-544-7290

Employee Assistance Program

PSC | Federal Occupational Health
U.S. Department of Health and Human Services

Live Healthy and Work Well

Employee Assistance Program (EAP) Resources

Explore FOH4You

FOH4You is a confidential counseling and referral service designed to help you and your family successfully manage everyday challenges and work through personal or work-related concerns.

This website is full of valuable information, educational materials, and tools that can help you better understand and address key behavioral health issues (such as depression, stress, anxiety, and substance abuse), improve relationships, sharpen skills, achieve greater work/life balance, and tend to legal and financial matters.

Counseling

Legal, Financial, and Identity Theft Help

Supervisor Support

Live and On-Demand Webinars

Newsletters

Resilience

Community Resources

Benefits and Eligibility

Need help?
Look for the **Live Chat** button on the right side of each page.
Live Chat is available Monday-Friday from 8:00am to 6:30pm ET. If you send a message outside of these hours, someone will respond the next business day. For technical issues, call 1-800-424-6008.

https://magellanascend.com/?ccid=hpZiwITni%2FVKNrZgvUQNB6H843mPpM2G6XP9mLkU80g%3D#carouselExampleIndicators

(TTY): 888-262-7848
800-222-0364

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UNDERSTANDING BIAS MODEL

Identify Bias

Bias exists in everyone, including me. I actively think about how bias is at play in the choices I make.

Cultivate Connection

Only when I cultivate meaningful connections can I see past bias and value the people around me.

Choose Courage

When I effectively confront bias, I create a space where we are all valued and able to contribute our best.

UNDERSTANDING BIAS: IMPACT OF BEHAVIORS
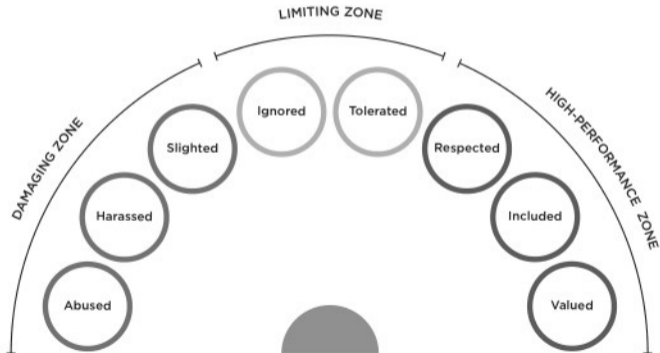
BIAS TRAP:
INFORMATION OVERLOAD

2

We are bombarded by information that our brains automatically filter. Some of the information we filter out is actually useful and important.

EXAMPLE BIASES:

Confirmation Bias

We tend to seek information that supports our existing beliefs.

Getting news from a single source.

Anchoring Bias

We tend to rely on the first piece of information we see.

Misdiagnosing an illness by paying too much attention to the first symptom identified.

?

BIAS TRAP: INFORMATION OVERLOAD

Use these tips to avoid this bias trap.

Pause: Question It

- What information have I excluded?
- Have I only chosen data that confirms existing beliefs?

Seek to Understand

- Have I explored the opposing side?
- What is an alternative point of view?

Check Assumptions

- What am I assuming?
- What are others assuming?

Learn

- What information am I avoiding?
- What are the critical facts I need in order to make an effective decision?

BIAS TRAP: FEELINGS OVER FACTS

3

When we have strong feelings about something, we tend to be driven by our beliefs rather than by facts. Our impulses and beliefs can override our logic and thinking processes.

EXAMPLE BIASES:

In-Group Bias

We tend to favor people we like and who are like us, while excluding and judging those who are different.

While considering candidates, hiring the candidate who shares your background.

Negativity Bias

We are more powerfully influenced by negative experiences than positive or neutral experiences.

Remembering a bad customer experience instead of the good or neutral ones.

!

BIAS TRAP: FEELINGS OVER FACTS

Consider the following tips to avoid this bias trap.

Pause: Question It
- What am I feeling? Why?
- What am I making up?

Seek to Understand
- Am I jumping to conclusions?
- What have I discarded because it didn't fit my beliefs?

Check Assumptions
- What am I assuming?
- Who can I check my assumptions with?

Learn
- What are the facts that support what I'm feeling?
- What other information do I need?

BIAS TRAP:
NEED FOR SPEED

We take shortcuts to act quickly. Often these time-savers are based on bias and can be simplistic, self-centered, and even counterproductive.

EXAMPLE BIASES:

Attribution Bias

We judge others on their actions, but we judge ourselves based on our intent.

Thinking another person is ineffective because they made a mistake.

Sunk-Cost Bias

We tend to continue things because we've invested time, money, or resources into them.

Keeping something you don't need, just because you spent money on it.

»

BIAS TRAP: NEED FOR SPEED

Use these tips to avoid this bias trap.

Pause: Question It

- What shortcuts am I taking?
- Is this the right decision, or just the thing that is in front of me?

Seek to Understand

- Why do I need to act fast?
- What are the unintended consequences of acting fast?

Check Assumptions

- If I had more time, what would I be doing differently?
- Would this be the best solution if there were no previous investment of time or energy?

Learn

- What would the best solution look like?
- Can I make a checklist to help me take effective action?

PRACTICE EMPATHY AND CURIOSITY

5

Empathy is...

The ability to understand another person's experiences, feelings, and emotions. The key is to put yourself in the other person's shoes.

Curiosity is...

The desire to learn more about someone or something. The key is to fall in love with questions rather than answers.
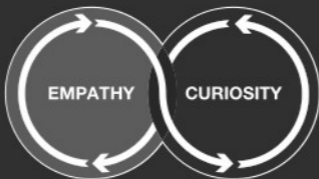
EMPATHY   CURIOSITY

Together, empathy and curiosity help us cultivate connection and be more open-minded so we can recognize and address any biases in our thinking.

PRACTICE EMPATHY AND CURIOSITY

Tips to increase empathy and curiosity.

Have Empathy

- Position yourself physically at the same level.
- Be fully present as you listen.
- Restate words and identify feelings to show you understand.
- Withhold judgment.

Be Curious

- What am I thinking or feeling?
- What are they thinking or feeling?
- What biases are surfacing, both positive and negative?

Build a Connection

- What do we both care about?
- How am I like this person?
- What do I respect or like about this person?

CULTIVATE MEANINGFUL CONNECTIONS: START SAFE

To connect with someone for the first time, start safe. Use the questions below to get started. (Use the questions on the back of this card to go deeper.)

- What are you working on?
- What's the best thing that's happened to you today?
- What did you do before you came to this job? What did you like most about it?
- What are you good at?
- What is your favorite place?
- What do you do to get rid of stress? What do you like most about that?
- What are you interested in that most people haven't heard of?

CULTIVATE MEANINGFUL CONNECTIONS: DIVE DEEPER

Once an initial connection is made, use some of these questions to enrich it. (Use the front of this card to make an initial connection.)

- What is your next adventure?
- What are some things you've had to unlearn?
- What small gesture from a stranger made a big impact on you?
- What is the most challenging thing you do on a regular basis?
- What do you do to make the world a better place?
- What opportunities do you have for growth and development?
- What is something you've been meaning to try?
- What is something everyone should do at least once?

COURAGE THAT DRIVES CHANGE: CAREFUL COURAGE

Effective courage is both careful and bold. Careful courage is especially valuable when there's high risk. Use these ideas to practice careful courage when addressing bias.

Use Softening Statements

- "What I'm hearing you say is..."
- "It seems like..."
- "When you said _____, what did you mean?"

Create a Safe Place

- Reflect before speaking.
- Give yourself and others time. "Let's take a break now and come back later."
- Apologize when you need to.
- Have a one-on-one discussion.
- Avoid shaming.
- Assume good intent.

COURAGE THAT DRIVES CHANGE: BOLD COURAGE

Effective courage is both careful and bold. Bold courage makes the case for an immediate need to change. Use these ideas to practice bold courage when addressing bias.

Be Direct

- Ask for what you want.
- Call things what they are.
- Share the evidence and the impact.

Challenge the Status Quo

- Be willing to say no.
- Point out problems.
- Offer solutions.

Include Others

- Call other people into the conversation.
- Ask for feedback: "What can we do to make this right?"
- Create opportunities.

COURAGE TO IDENTIFY

Bias happens at the speed of thought. When we have the courage to identify bias in ourselves and others, we can begin to address the impact it has.

Be courageous and continue to explore the impact of bias for you, for others, and for your organization.

Pause: Question It

Seek to Understand

Check Assumptions

Learn

WAYS TO ACT WITH COURAGE: COURAGE TO IDENTIFY

Pause: Question It
- Pause before you act.
- *What am I thinking? What am I feeling?*
- *Am I being reactive?*
- *What's causing my reaction?*

Seek to Understand
- Distinguish between facts and feelings.
- Use empathy and curiosity to understand what others are thinking.
- *What's important here? Why?*

Check Assumptions
- *What are the facts? What am I missing?*
- *What have I made up to fill in the gaps?*
- *What assumptions are others making?*

Learn
- Commit to learning about bias.
- Invite others to learn with you.

COURAGE TO COPE

Being the subject of negative bias can take a toll on well-being. Coping with the effects of bias looks different in every situation. It could be stepping away, choosing a response beforehand, finding a coach, or even sharing your experience with others.

Prioritize Self-Care

Proactively Choose a Response

Get a Coach or Mentor

Share Your Story

WAYS TO ACT WITH COURAGE: COURAGE TO COPE

Prioritize Self-Care
- Take a break to clear your mind.
- *How do I need to take care of myself now?*
- *How do I deal with this for the long term?*

Proactively Choose a Response
- *What is a bias I often experience?*
- Plan what you can do or say when you face this bias in the future.
- Use the response and keep improving it.

Get a Coach or Mentor
- Choose someone who can help you see alternate perspectives.
- Commit to regular conversations.

Share Your Story
- Capture stories of bias in your life.
- Help others cope by sharing how you cope.

COURAGE TO ALLY

Whether you are the subject of bias or not, being an ally can bring about change. Teaming up with others to explore bias can make a significant impact. Offering support, mentoring, or helping another to be heard are powerful ways to address bias.

Team Up With Others

Offer Support

Be a Coach or Mentor

Amplify Others' Voices

WAYS TO ACT WITH COURAGE: COURAGE TO ALLY

Team Up With Others
- Identify a bias that impacts others.
- Find others who want to act as allies.

Offer Support
- Notice who needs support to address bias.
- Use empathy and curiosity to understand.
- Act as a thinking partner.

Be a Coach or Mentor
- Offer to be a mentor or coach to others.
- Commit to regular conversations.
- Learn by listening.
- Share your experiences as appropriate.

Amplify Others' Voices
- Notice trends in meetings and decisions.
- If someone is left out, reinforce their ideas.

COURAGE TO ADVOCATE

As an advocate, you take proactive steps to address bias. Advocates educate others and can inspire more people to take action. Building networks to bring people together can have a great impact.

Enact Group Strategies

Write About Your Experience

Organize Networks

Speak Up

WAYS TO ACT WITH COURAGE: COURAGE TO ADVOCATE

Enact Group Strategies
- Set group goals for making progress.
- Share best practices for addressing bias.

Write About Your Experience
- Tell your story to help people understand your context and perspective.
- Share how you are addressing bias on appropriate media.

Organize Networks
- *What networks exist at work or in my community that I could join?*
- *What new network could I organize?*

Speak Up
- Confront bias with courage and consideration.
- Most people don't intend to be biased, so assume positive intent.

Step 1:

Read the following question and answers. Choose one answer that best reflects how you would feel.

Question: What would make me feel most guilty?

a. Taking credit for something someone else did.

b. Participating in gossip about a colleague.

c. Telling a lie to someone I love or respect.

d. Not speaking up to support a colleague's good idea.

Step 2:

a. Read the question and answers out loud to the group and state which answer you chose.

b. Explain the "why" behind your choice for no more than 1 minute.

Step 3:

Ask the group:

Based on my explanation, what do I value? What motivates me? What did I say that helped you understand that?

Step 1:

Read the following question and answers. Choose one answer that's true for you.

Question: What emotion is the hardest for me to express?

a. Joy

b. Anger

c. Sadness

d. Confidence

WHAT DO YOU THINK?

Step 2:

a. Read the question and answers out loud to the group and state which answer you chose.

b. Explain the "why" behind your choice for no more than 1 minute.

Step 3:

Ask the group:

Based on my explanation, what do I value? What motivates me? What did I say that helped you understand that?

Step 1:

Read the following question and answers. Choose one answer that best reflects how you would feel.

Question: What would be most embarrassing to me?

a. Public speaking.

b. Missing a deadline at work.

c. Receiving negative feedback on my work.

d. Tripping and falling in public.

Step 2:

a. Read the question and answers out loud to the group and state which answer you chose.

b. Explain the "why" behind your choice for no more than 1 minute.

Step 3:

Ask the group:

Based on my explanation, what do I value? What motivates me? What did I say that helped you understand that?

Step 1:

Read the following question and answers. Choose one answer that best reflects what you would do.

Question: When I'm upset or stressed, what am I most likely to do?

a. Eat food.

b. Talk to a friend.

c. Exercise.

d. Something else (explain).

Step 2:

a. Read the question and answers out loud to the group and state which answer you chose.

b. Explain the "why" behind your choice for no more than 1 minute.

Step 3:

Ask the group:

Based on my explanation, what do I value? What motivates me? What did I say that helped you understand that?

Step 1:

Read the following question and answers. Choose one answer that best reflects what you would do.

Question: If I had time in my schedule to help others, what would I do?

a. Lead a fundraiser.

b. Prepare for and run a 10K to support cancer research.

c. Help prepare and serve food at a shelter.

d. Teach children to read.

WHAT DO YOU THINK?

Step 2:

   a. Read the question and answers
out loud to the group and state
which answer you chose.

   b. Explain the "why" behind your
choice for no more than 1 minute.

Step 3:

Ask the group:

Based on my explanation, what do I
value? What motivates me? What did I
say that helped you understand that?

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Step 1:

Choose *one* emotion from the list below:

   a. Confused

   b. Excited

   c. Angry

Step 2:

Read the following sentence out loud with the emotion you chose in Step 1:

"Some big event is happening in my neighborhood."

Step 3:

a. Ask the group: "Which emotion am I portraying?"

b. Ask the group: "What clues led you to think that?"

Step 1:

Read through the list of actions.
Choose one that annoys you most.

a. Drum or tap your fingers
   on the table.

b. Sniff.

c. Bite your nails.

d. Chew gum.

ACT IT OUT

Step 2:

Tell the group: "I'm going to act out four actions. You've got to identify which one annoys me most."

Act out the four actions, one after the other.

Step 3:

a. Ask the group: "Which action do I find most annoying?"

b. Ask the group: "What clues led you to think that?"

Step 1:

Choose one of the following situations. You will act out how you would feel or react using only facial expressions and/or body language.

a. My best friend is getting a divorce.

b. I just received a complaint from a customer.

c. I'm late for work.

d. I've got a really bad headache.

Step 2:

Tell the group: "I'm going to act out my response to one of these four situations. You have to guess the situation I chose."

Read the four situations, then act out your response to the one you chose.

Step 3:

a. Ask the group: "Which situation did I choose?"

b. Ask the group: "What clues led you to think that?"

Step 1:

Choose one of the emotions below to act out to the group. You'll need to show the emotion without using words.

a. Sad

b. Annoyed

c. Embarrassed

d. Excited

Step 2:

Tell the group: "I'm going to read four emotions, then act one of them out. You have to guess which one."

Read out the four emotions, then act out one using nonverbal cues only.

Step 3:

a. Ask the group: "Which emotion am I portraying?"

b. Ask the group: "What clues led you to think that?"

Step 1:

Choose one message from the list below to act out to your group without using words.

a. I'm impressed.

b. You're getting on my nerves.

c. You've offended me.

d. I want your advice.

ACT IT OUT

Step 2:

Tell the group: "I'm going to read four messages, then act one out. You have to guess which one I'm acting out."

Read out the four messages and act out your chosen message without using words.

Step 3:

a. Ask the group: "Which message am I portraying?"

b. Ask the group: "What clues led you to think that?"

UNCONSCIOUS
BIAS

Understanding Bias to
Unleash Potential™

FranklinCovey®
THE ULTIMATE COMPETITIVE ADVANTAGE

ABOUT FRANKLINCOVEY

FranklinCovey is a global company specializing in performance improvement.

We help organizations achieve results that require a change in human behavior. Our expertise is in seven areas: Leadership, Execution, Productivity, Trust, Sales Performance, Customer Loyalty, and Education.

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UNCONSCIOUS
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Understanding Bias to
Unleash Potential

NAME

Introduction

UNCONSCIOUS
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Understanding Bias to
Unleash Potential

What Is Bias?

Bias is a **preference** in favor of or against a thing, person, or group compared with another. It may be held by an individual, a group, or an institution, and it can have negative or positive consequences.

SELF BIAS

BIAS ABOUT OTHERS

SELF BIAS
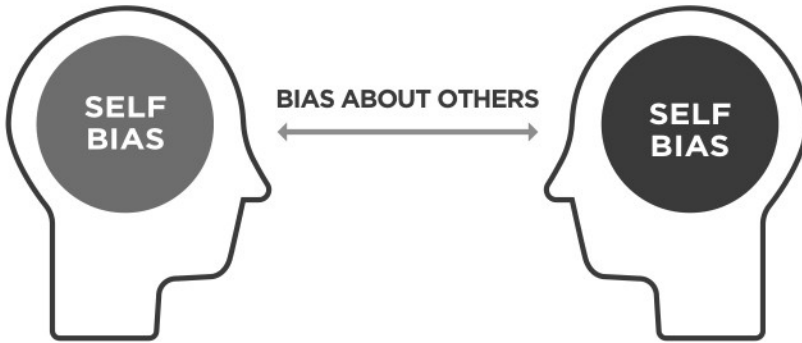
Conscious and Unconscious Bias

CONSCIOUS BIAS	UNCONSCIOUS BIAS
EXPRESSED DIRECTLY	**EXPRESSED INDIRECTLY**
WE ARE AWARE OF THE BIAS	**WE ARE NOT AWARE OF THE BIAS**
"Salespeople need to be extroverted."	*"I don't think she'd be a good fit in our team."*
"We have a bias for action in our organization"	*"We don't have time to talk about alternatives."*
"It would be difficult for someone of her age to do all that travel."	*"That promotion requires a lot of travel. He seems better suited to the role."*

"There is no neutrality. There is only greater or lesser awareness of one's bias."

PHYLLIS ROSE, AUTHOR

Bias in Action in Your Life

Where do you experience bias?

- [ ] Age Group
- [ ] Color
- [ ] Education Level
- [ ] Expertise
- [ ] Family Status
- [ ] Gender
- [ ] National Origin
- [ ] Personality

- [ ] Physical Ability
- [ ] Physical Appearance
- [ ] Political Views
- [ ] Race/Ethnicity
- [ ] Religion
- [ ] Sexual Orientation/Identity
- [ ] Socioeconomic Status

What areas in your work and life have been affected by bias, either positively or negatively?

- [ ] Confidence
- [ ] Creativity
- [ ] Decision-Making
- [ ] Emotional Health
- [ ] Employment
- [ ] Engagement
- [ ] Opportunity
- [ ] Performance
- [ ] Personal Freedom

- [ ] Physical Health
- [ ] Relationships
- [ ] Risk-Taking
- [ ] Safety
- [ ] Self-Esteem
- [ ]
- [ ]
- [ ]
- [ ]

What is the impact?

Video: *More Than You See*

What insights did you have about bias from the video?

Impact of Behaviors

Our biases significantly impact how we behave toward ourselves and each other. The behaviors range from positive, inclusive behaviors to those that are hurtful and abusive.

LIMITING ZONE

DAMAGING ZONE

HIGH-PERFORMANCE ZONE

Ignored

Tolerated

Slighted

Respected

Harassed

Included

Abused
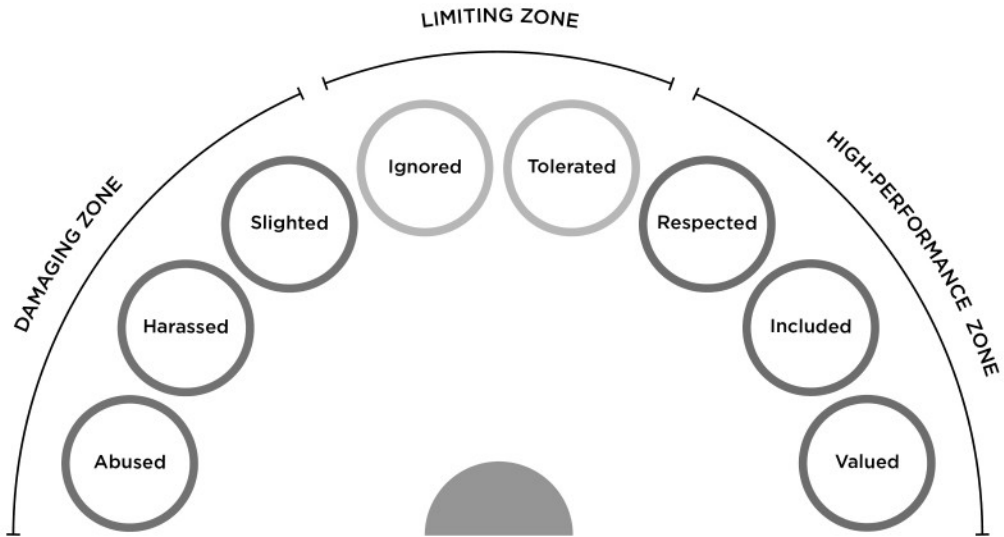
Valued

HIGH-PERFORMANCE ZONE

When we make the effort to be aware of and address our biases, we actively behave in ways that make people feel valued, included, and respected.

LIMITING ZONE

When we don't make an effort to address biases, we allow them to limit the contribution of others. Ignoring or tolerating others affects their sense of belonging and, ultimately, their engagement and contribution.

DAMAGING ZONE

When we either intentionally or unintentionally use verbal, nonverbal, or environmental behaviors that communicate negative, hostile, or derogatory messages, we can affect people's emotional, mental, and physical well-being. Behaviors that damage vary from microaggressions (everyday slights, snubs, or insults) to harassment and abuse.

The Impact of Bias at Work

When we understand biases and address them, we unleash each individual's full potential to innovate, solve problems, and get results. When we operate in ways that address bias, we can then realize the benefits of different perspectives to overcome challenges and realize opportunities.

Companies in the top 25% on gender and racial diversity are more likely to over-perform in relation to their industry peers.

"DELIVERING THROUGH DIVERSITY,"
MCKINSEY & COMPANY

Companies in the lowest 25% on gender and racial diversity are 25% more likely to under-perform in relation to their industry peers.

"DELIVERING THROUGH DIVERSITY,"
MCKINSEY & COMPANY
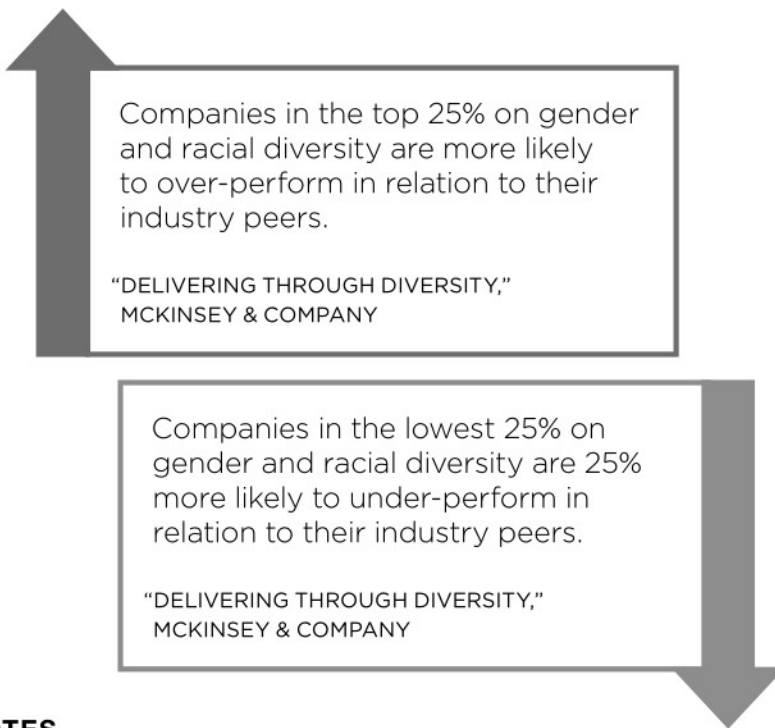
NOTES

Excerpted from "Delivering through Diversity", January 2018, McKinsey & Company, www.mckinsey.com.
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The Promise of Understanding Bias

By applying what you learn in this work session, you will increase your ability to:

- Notice and adjust for biases.
- More fully respect, include, and value the people around you.
- Release everyone's potential to contribute their best.

There is no idea more fundamental to performance than how we see and treat each other as human beings.

Understanding Bias Model

IDENTIFY
BIAS

CULTIVATE
CONNECTION

CHOOSE
COURAGE

IDENTIFY
BIAS

IDENTIFY
BIAS

CULTIVATE
CONNECTION

CHOOSE
COURAGE
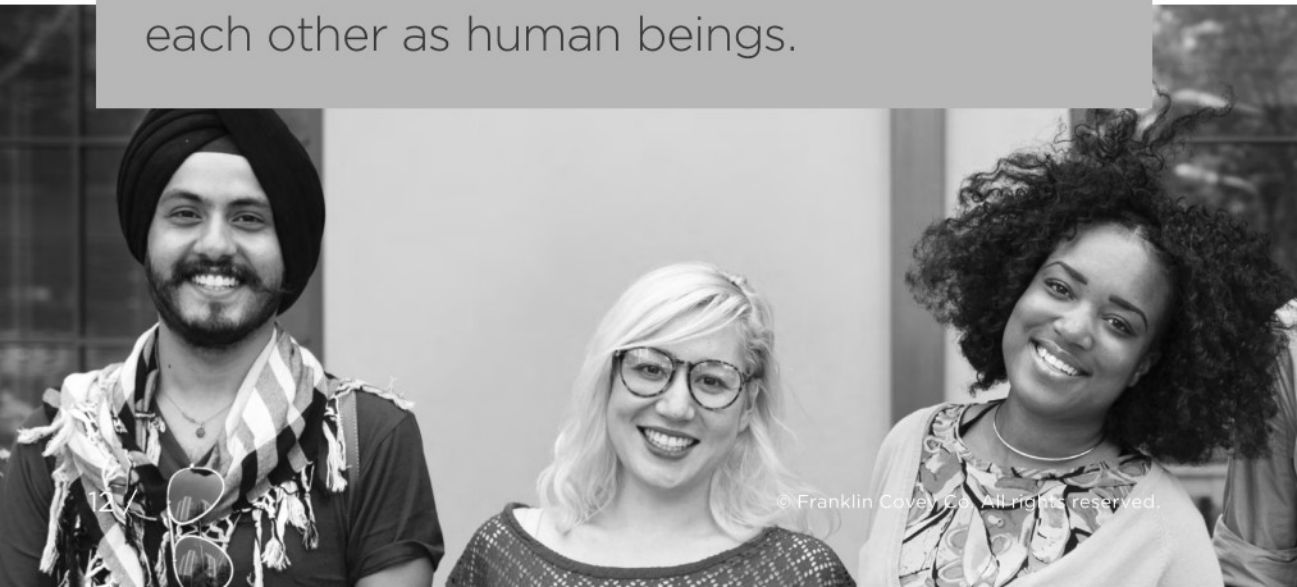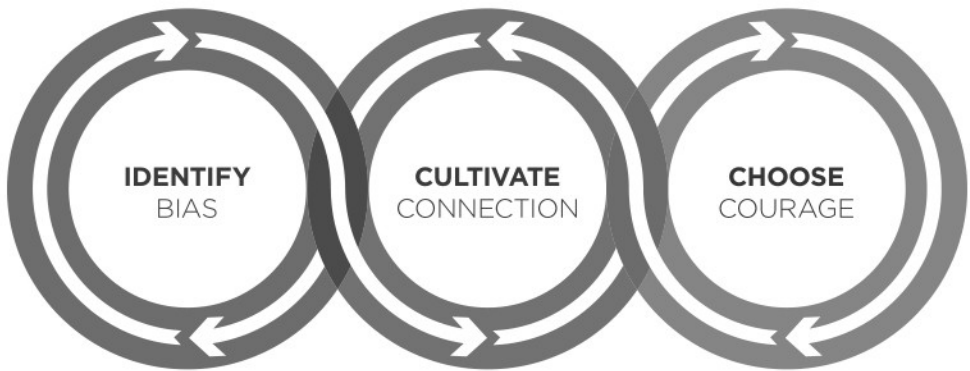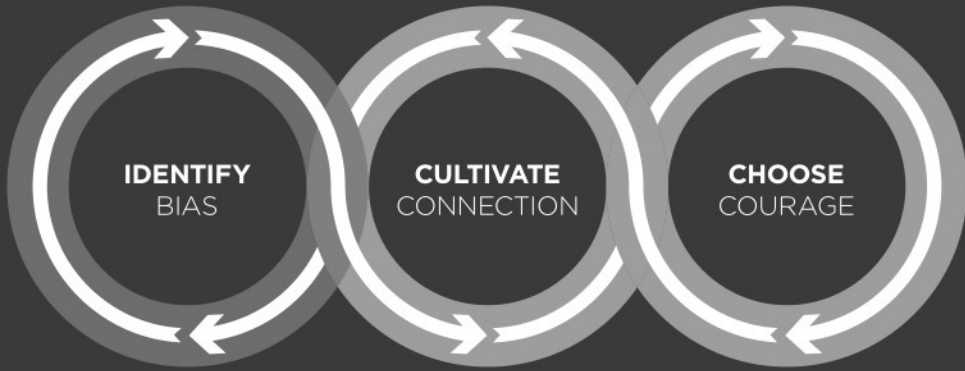
PRINCIPLE:
Self-Awareness

Identify Bias Roadmap:

1. Our personal identity influences, and is influenced by, our biases.

2. The way our brains work creates biases.

3. Three bias traps lead us into biased thinking and behavior.

Frame and Reframe

FRAME	REFRAME
I am not biased. I view things objectively.	Bias exists in everyone, including me. I actively think about how bias is at play in the choices I make.
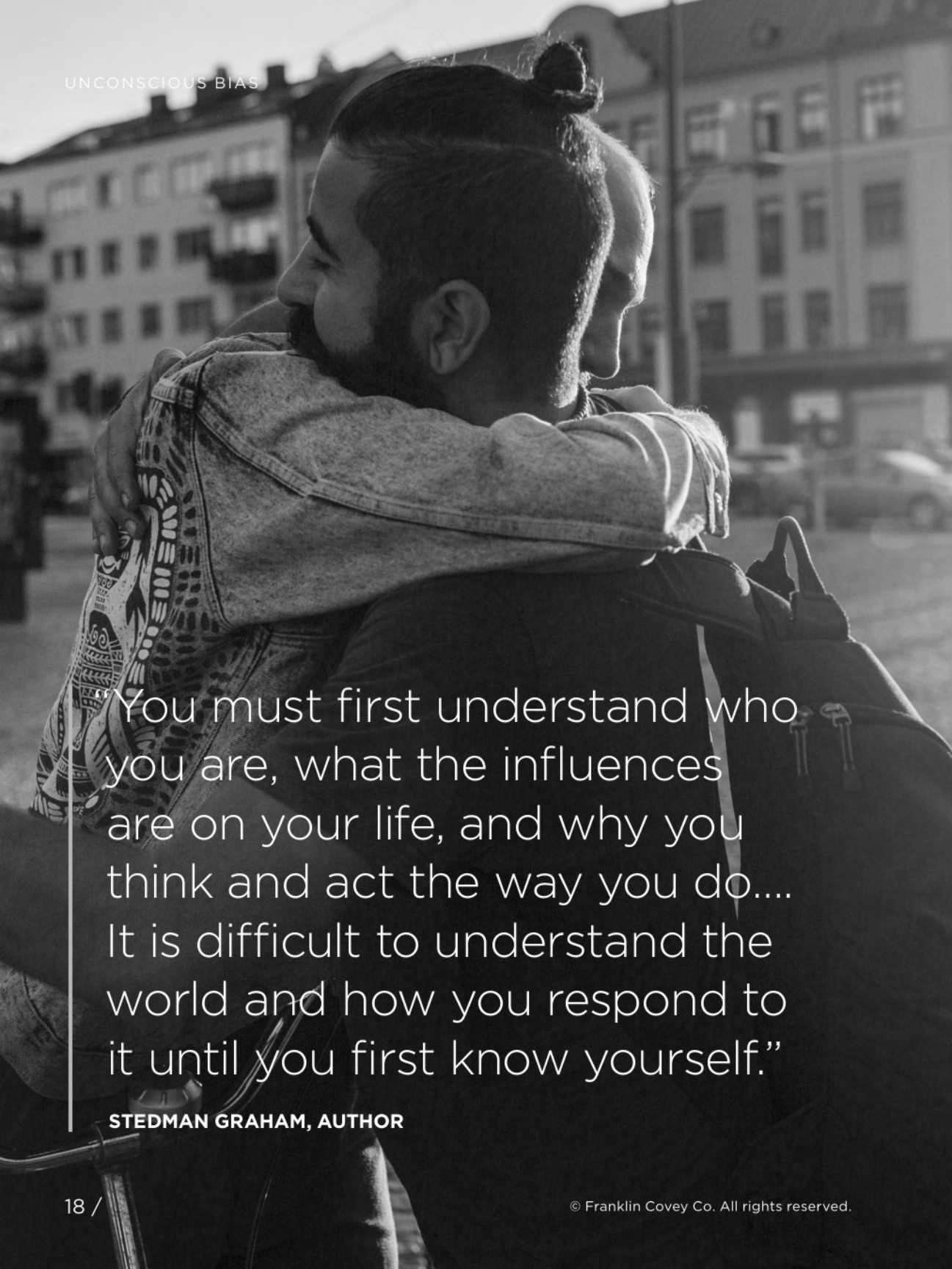
What is the contrast between the frame and reframe above?

"We're blind to our blindness. We have very little idea of how little we know. We're not designed to know how little we know."

DANIEL KAHNEMAN, AUTHOR, PSYCHOLOGIST

"You must first understand who you are, what the influences are on your life, and why you think and act the way you do.... It is difficult to understand the world and how you respond to it until you first know yourself."

STEDMAN GRAHAM, AUTHOR

Sources of Bias

Our biases are shaped by many factors.

- Our own experiences.

- Information we consume: news, social media, stories, books, movies, etc.

- Our education: the schools we attend, the subjects we study, the levels of study we pursue, etc.

- Our context: family, friends, work, where we live, what we do, who we spend time with.

- Our culture: spoken and unspoken rules of our community/society.

- Innate characteristics: traits we are born with are highly familiar to us.

All these factors shape how we see ourselves and can cause each of us to have our own different set of biases (both conscious and unconscious), which in turn influence our identity.
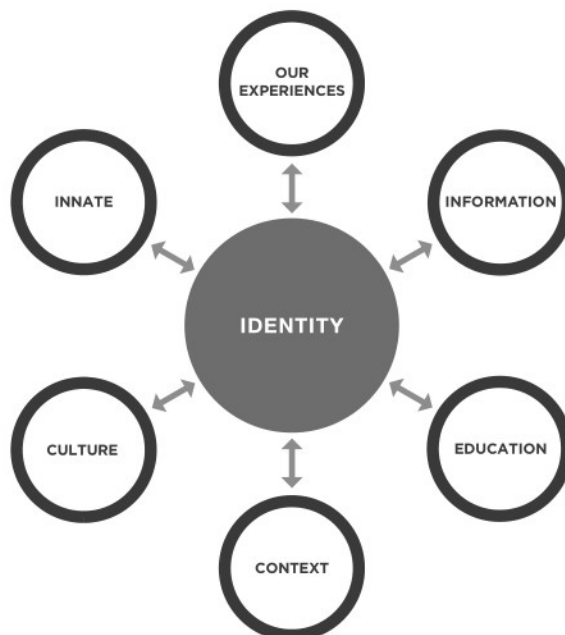
Identity and Bias

1. Complete 10 "I am..." statements that describe who you are.

2. Put an x next to the identifiers that can make you biased toward others.

3. Put a circle next to the identifiers that can make others biased toward you.

	✗	○
I am	☐	☐
I am	☐	☐
I am	☐	☐
I am	☐	☐
I am	☐	☐
I am	☐	☐
I am	☐	☐
I am	☐	☐
I am	☐	☐
I am	☐	☐

Key Points:

- Our identifiers can be sources of positive and negative bias.

- Some of our identifiers can cause us to act in biased ways toward others.

- Some of our identifiers can cause others to act in biased ways toward us.

- Identifiers can become more or less important in different contexts.

- Important identifiers are often felt deeply and may be associated with struggle.

- An identifier can be more significant (positive or negative) when we are a minority in a dominant group.

"We think we see the world as it is, when in fact we see the world the way we are."

STEPHEN R. COVEY

The Three Regions of the Brain

EMOTIONAL

- Emotions
- Behavior
- Memories
- Motivation

THINKING

- Abstract Thought
- Planning
- Attention
- Self-Control
- Choices
- Follow-Through

PRIMITIVE

- Survival
- Heart Rate
- Breathing
- Fight, Flight, or Freeze

Neuroplasticity is the brain's ability to form new connections and neural pathways. Creating change in how our brains process information takes time and effort, but we can rewire our thinking.

Video: *The Brain and Bias*

What triggers bias in the brain?

How can neuroplasticity help you mitigate bias?

Bias Traps and Common Biases

INFORMATION OVERLOAD

We are bombarded by information that our brains automatically filter. Some of the information we filter out is actually useful and important.

Confirmation Bias

We tend to seek out information that supports our existing beliefs.

Anchoring Bias

We tend to rely on the first piece of information we see.

FEELINGS OVER FACTS

When we have strong feelings about something, we tend to be driven by our beliefs rather than by facts. Our impulses and beliefs can override our logic and thinking processes.

In-Group Bias

We tend to favor people we like and who are like us, while excluding and judging those who are different.

Negativity Bias

We are more powerfully influenced by negative experiences than positive or neutral experiences.

NEED FOR SPEED

We take shortcuts to act quickly. Often these time-savers are based on bias and can be simplistic, self-centered, and even counterproductive.

Attribution Bias

We judge others on their actions, but we judge ourselves based on our intent.

Sunk-Cost Bias

We tend to continue things because we've invested time, money, or resources into them.

Summary: Identify Bias

IDENTIFY BIAS   CULTIVATE CONNECTION   CHOOSE COURAGE
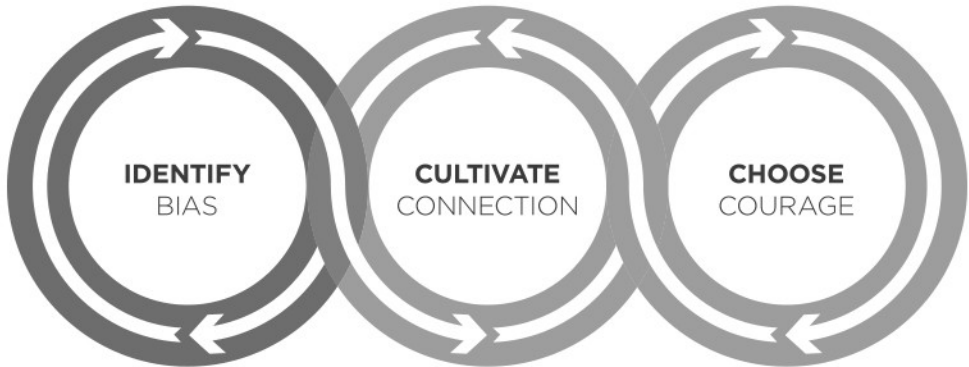
- Our personal identity influences, and is influenced by, our biases. This can create biases that lead to both positive and negative outcomes for ourselves and others.

- The way our brains work to process information creates biases. As a result, we all have biases.

- Three bias traps cause our brains to create shortcuts, or biases, that can lead us into biased thinking and behavior.

What have you learned about your own biases? Push yourself to identify biases you may have.

CULTIVATE
CONNECTION

IDENTIFY BIAS

CULTIVATE CONNECTION

CHOOSE COURAGE

PRINCIPLE:
Openness

Cultivate Connection Roadmap:

1. Increase empathy and curiosity.

2. Broaden and deepen networks.

Frame and Reframe

FRAME	REFRAME
If I understand my biases, I can fix them on my own.	Only when I cultivate meaningful connections can I see past bias and value the people around me.

What is the contrast between the frame and reframe above?

"Never underestimate the empowering effect of human connection. All you need is that one person, who understands you completely, believes in you and makes you feel loved for what you are, to enable you to unfold the miraculous you."

DRISHTI BABLANI, AUTHOR

Video: *All of Us*

What resonated with you as you watched the video?

What emotions did you experience?

Empathy and Curiosity

Empathy: The ability to understand another person's experiences, feelings, and emotions. Empathy is an emotional process: connecting with your heart.

Curiosity: The desire to learn more about someone or something. Curiosity is a mental process: connecting with your head.
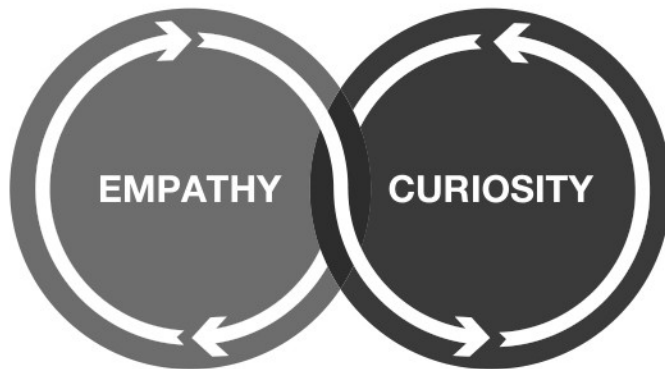
Empathy and curiosity reinforce each other and fuel connection. We can practice empathy and curiosity toward ourselves as well as toward other people. These skills help us surface, manage, and address our biases.

NOTES

Empathy and Curiosity Grid

When we practice both empathy and curiosity, we are more open-minded and less judgmental. The quality of our decision-making improves because we have been less biased and more inclusive in the information we've gathered.

CURIOSITY

| QUESTION | CONNECT |
| DISENGAGE | LISTEN |
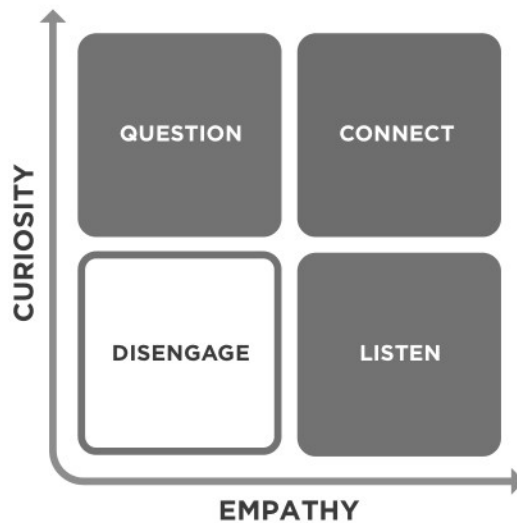
EMPATHY

Empathy and Curiosity Self-Assessment

EMPATHY

What makes it easy for you to practice empathy?

What makes it hard for you to practice empathy?

CURIOSITY

What makes it easy for you to practice curiosity?

What makes it hard for you to practice curiosity?

Practice Empathy and Curiosity

NOTES

CULTIVATE CONNECTION

PRACTICE EMPATHY AND CURIOSITY

Tips to increase empathy and curiosity.

Have Empathy
- Position yourself physically at the same level.
- Be fully present as you listen.
- Restate words and identify feelings to show you understand.
- Withhold judgment.

Be Curious
- What am I thinking or feeling?
- What are they thinking or feeling?
- What biases are surfacing, both positive and negative?

Build a Connection
- What do we both care about?
- How am I like this person?
- What do I respect or like about this person?

"If you don't understand, ask questions. If you're uncomfortable about asking questions, say you are uncomfortable about asking questions and then ask anyway."

CHIMAMANDA NGOZI ADICHIE, AUTHOR AND SPEAKER

Practice Empathy and Curiosity

What did you learn about the other person?

How are you like this person?

Examine Your Frequent Connections

——

This activity helps you explore the depth and breadth of your connections with others so you can identify and address potential sources of bias in your life.

1. List 10 people from your professional network that you choose to interact with. List the people you most frequently connect with, not who you think you should connect with. Be honest with yourself.

    Professional Network
    - Who do you go to for professional advice? Who comes to you?
    - Who do you go to for mentoring/coaching? Who comes to you?
    - Who would you go to for help with a project? Who comes to you?

2. With your identified list of people, count the number of people who are the same and different from you in each of the categories below.
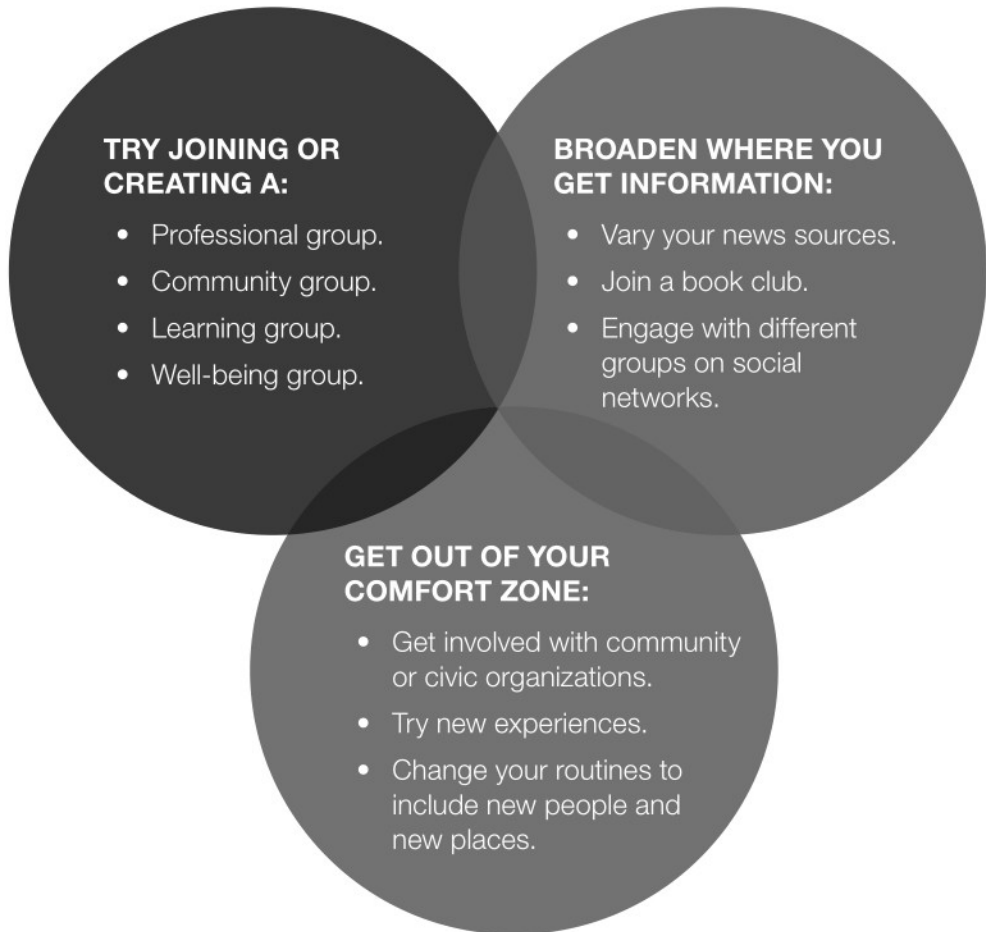
Same	Different	
		Age Group
		Color
		Education Level
		Expertise
		Family Status
		Gender
		National Origin
		Personality

Same	Different	
		Physical Ability
		Physical Appearance
		Political Views
		Race/Ethnicity
		Religion
		Sexual Orientation/ Identity
		Socioeconomic Status

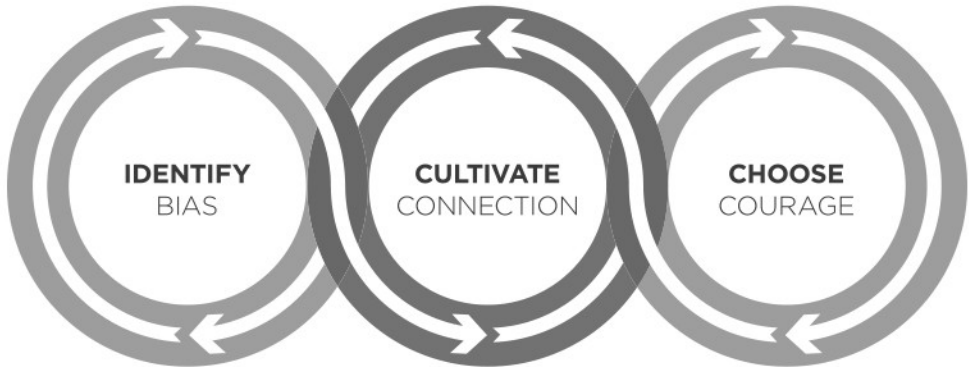3. What do you notice about who you choose to connect with?

4. How does who you connect with affect your influence?

Build Broader Connections

Include new people in your network who can help you see past bias. By challenging your thinking, you can overcome blind spots and create a space where everyone can contribute and feels valued.

TRY JOINING OR CREATING A:

- Professional group.
- Community group.
- Learning group.
- Well-being group.

BROADEN WHERE YOU GET INFORMATION:

- Vary your news sources.
- Join a book club.
- Engage with different groups on social networks.

GET OUT OF YOUR COMFORT ZONE:

- Get involved with community or civic organizations.
- Try new experiences.
- Change your routines to include new people and new places.

Summary: Cultivate Connection


IDENTIFY
BIAS

CULTIVATE
CONNECTION

CHOOSE
COURAGE

- When we cultivate connections with people through empathy and curiosity, we are able to surface and explore bias—both in ourselves and others.

- As we consciously broaden and deepen our networks, we are able to increase our understanding of, and value for, different points of view.

What have you learned about cultivating connections?

CHOOSE
COURAGE

PRINCIPLE:
Growth
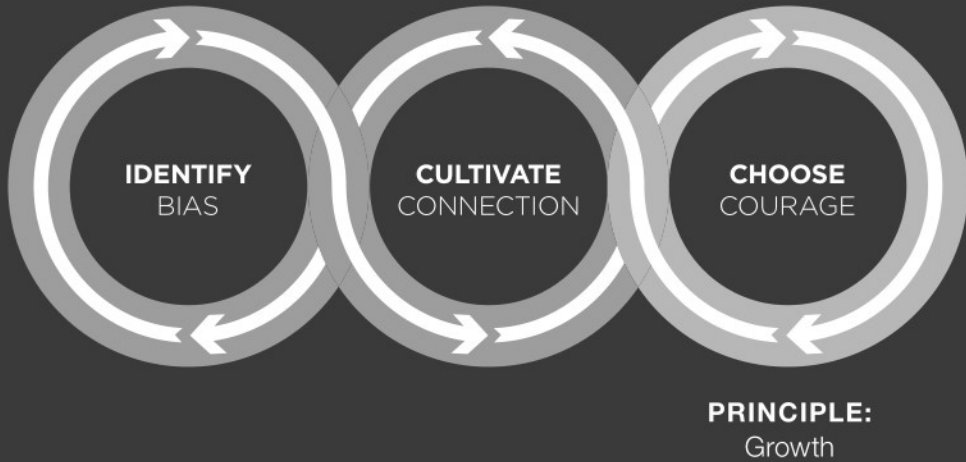
Choose Courage Roadmap:

1. Understand the nature of courage.

2. Act with courage to address biases that:
    - Limit me.
    - Limit others.
    - Limit my organization.

Frame and Reframe

FRAME	REFRAME
If I confront bias, it will just create more division.	When I effectively confront bias, I create a space where we are all valued and able to contribute our best.

What is the contrast between the frame and reframe above?

"It's easy to stand with the crowd.
It takes courage to stand alone."

MAHATMA GANDHI, ACTIVIST

What Does Courage Mean?

- [ ] Bravery
- [ ] Caution
- [ ] Endurance
- [ ] Firmness
- [ ] Vulnerability
- [ ] Boldness
- [ ] Listening
- [ ] Audacity
- [ ] Fearlessness

- [ ] Concentration
- [ ] Silence
- [ ] Responsibility
- [ ] Determination
- [ ] Conscientiousness
- [ ] Presence
- [ ] Deliberation
- [ ] Attention
- [ ] Valor

- [ ] Enthusiasm
- [ ] Heroism
- [ ] Care
- [ ] Effort
- [ ] Kindness
- [ ] Daring
- [ ] Discipline
- [ ] Tenacity
- [ ] Mindfulness

What does courage mean to you?

"I learned that courage was not the absence of fear, but the triumph over it. The brave man is not he who does not feel afraid, but he who conquers that fear."

NELSON MANDELA, POLITICIAN

"Courage doesn't always roar. Sometimes courage is the quiet voice at the end of the day that says I'll try again tomorrow."

MARY ANNE RADMACHER, AUTHOR

"A person with outward courage dares to die; a person with inner courage dares to live."

LAO TZU, PHILOSOPHER

"Courage is what it takes to stand up and speak; courage is also what it takes to sit down and listen."

WINSTON CHURCHILL, POLITICIAN

"Life shrinks or expands in proportion to one's courage."

ANAÏS NIN, AUTHOR

"The most fundamental aggression to ourselves, the most fundamental harm we can do to ourselves, is to remain ignorant by not having the courage and the respect to look at ourselves honestly and gently."

PEMA CHÖDRÖN, AUTHOR

"Courage is an inner resolution to go forward despite obstacles; cowardice is submissive surrender to circumstances."

MARTIN LUTHER KING JR., ACTIVIST

"Courage is resistance to fear, mastery of fear—not absence of fear."

MARK TWAIN, AUTHOR

Courage Defined

Courage is the mental or moral strength to strive and persevere in the face of uncertainty, fear, or difficulty. **Effective courage is both careful and bold.**

Careful Courage

Careful courage is valuable when there's high risk and low safety.

What are the strengths and limitations of having careful courage?

CHOOSE COURAGE

COURAGE THAT DRIVES CHANGE: CAREFUL COURAGE

7

Effective courage is both careful and bold. Careful courage is especially valuable when there's high risk. Use these ideas to practice careful courage when addressing bias.

Use Softening Statements
- "What I'm hearing you say is..."
- "It seems like..."
- "When you said ____, what did you mean?"

Create a Safe Place
- Reflect before speaking.
- Give yourself and others time. "Let's take a break now and come back later."
- Apologize when you need to.
- Have a one-on-one discussion.
- Avoid shaming.
- Assume good intent.

"Self-control is the chief element in self-respect, and respect of self, in turn, is the chief element in courage."

THUCYDIDES, HISTORIAN

Bold Courage

Bold courage often inspires immediate change.

What are the strengths and limitations of having bold courage?

COURAGE THAT DRIVES CHANGE: BOLD COURAGE

Effective courage is both careful and bold. Bold courage makes the case for an immediate need to change. Use these ideas to practice bold courage when addressing bias.

Be Direct
- Ask for what you want.
- Call things what they are.
- Share the evidence and the impact.

Challenge the Status Quo
- Be willing to say no.
- Point out problems.
- Offer solutions.

Include Others
- Call other people into the conversation.
- Ask for feedback: "What can we do to make this right?"
- Create opportunities.

Video: *Courage in Action*

Who showed courage in the story?

Ways to Act With Courage

COURAGE TO IDENTIFY

NOTICE BIAS HAPPENING.

Bias happens at the speed of thought. When we have the courage to identify bias in ourselves and others, we can begin to address the impact it has.

Be courageous and continue to explore the impact of bias for you, for others, and for your organization.

> **PAUSE: QUESTION IT**
> (Page 60)

> **SEEK TO UNDERSTAND**
> (Page 61)

> **CHECK ASSUMPTIONS**
> (Page 62)

> **LEARN**
> (Page 63)

COURAGE TO COPE

DEAL WITH BIAS.

Being the subject of bias can take a toll on well-being. Coping with the effects of bias looks different in every situation. It could be stepping away, choosing a response beforehand, finding a coach, or even sharing your experience with others.

> **PRIORITIZE SELF CARE**
> (Page 64)

> **PROACTIVELY CHOOSE A RESPONSE** (Page 65)

> **GET A COACH OR MENTOR**
> (Page 66)

> **SHARE YOUR STORY**
> (Page 67)

COURAGE TO ALLY

HELP OTHERS WITH BIAS.

Whether you are the subject of bias or not, being an ally can bring about change. Teaming up with others to explore bias can make a significant impact. Offering support, mentoring, or helping another be heard are powerful ways to address bias.

TEAM UP WITH OTHERS
(Page 68)

OFFER SUPPORT
(Page 69)

BE A COACH OR MENTOR
(Page 70)

AMPLIFY OTHERS' VOICES
(Page 71)

COURAGE TO ADVOCATE

PROACTIVELY ADDRESS BIAS.

As an advocate, you take proactive steps to address bias. Advocates educate others and can inspire more people to take action. Building networks to bring people together can have a great impact.

ENACT GROUP STRATEGIES
(Page 72)

WRITE ABOUT YOUR EXPERIENCE (Page 73)

ORGANIZE NETWORKS
(Page 74)

SPEAK UP
(Page 75)

Bias Scenarios

Review the scenario.

What would you do to address bias productively in this situation?

Summary: Choose Courage

- Courage can be both careful and bold.
- When we act with courage, we address the biases that limit us, our teams, our customers, and our organizations.
- We act with courage when we identify bias, cope with bias, act as an ally, and act as an advocate. Doing so can have positive impacts at all levels, including for our organizations.

What have you learned about choosing courage?

Addressing Bias Action Plan

Choose one everyday situation at work where you want to explore and address bias:

1. Identify Bias: Review Practice Cards 2–4. How can you notice and address one of the bias traps in your everyday situation?

2. Cultivate Connection: How will you cultivate meaningful connections so you can see past bias and value the people around you?

3. Choose Courage: Review Practice Cards 8–11. Choose one skill you can apply to your everyday situation for the next four weeks.

4. Schedule regular check-ins (at least weekly) with yourself to monitor your progress.

    Week 1   Week 3

    Week 2   Week 4

5. Choose someone to be your Accountability Partner. The role of Accountability Partner is to challenge you, support you, and hold you accountable for making progress. Answer the following:

    What support do I need from my Accountability Partner?

    How often do I need to check in with my Accountability Partner?

6. Schedule a call with your Accountability Partner. Invite them to help you make progress and set up regular calls to discuss progress, get feedback, celebrate wins, and work to overcome obstacles.

7. If you are a manager, what is one thing you can do to help your team understand and address bias? (See the Manager Resource Guide on the following pages for suggestions.)

Manager Resource Guide

Move your team into the high-performance zone using these steps.

Step 1: Identify Biases That Impact Your Team

1. **Complete Your Addressing Bias Action Plan.**
   Work on your commitments weekly and review
   progress with your Accountability Partner.

2. **Address Bias in Your Decisions.** Consider decisions about team
   members from hiring, to training, assignments, and promotions.
   How can you minimize bias's impact on these decisions?

3. **Identify Biases That Affect Your Team.** Consider each
   team member. What biases (your own or others') might limit
   their development? How will you address those biases?

4. **Avoid the Bias Traps.** Use Practice Cards 2, 3, and 4 to rewire
   your thinking to recognize bias traps and avoid common biases.

Step 2: Cultivate Connections on Your Team

1. **Share Your Commitments.** Share with your team how your perspective on bias has shifted. Go public on one thing you will stop, start, or do differently.

2. **Move Toward the High-Performance Zone.** Use Practice Card 1 to share the Impact of Behaviors Model in your 1-on-1s. Ask each team member which zone they are in and why. Get their input on how you can help them move to High Performance.

3. **Build Meaningful Connections on Your Team.** Use Practice Card 6 in your 1-on-1s to strengthen your connection with team members. Model empathy and curiosity when you do (Practice Card 5).

4. **Build Empathy and Curiosity Skills.** Use your Exploring Empathy and Curiosity Cards in team meetings to improve your team's empathy and curiosity skills.

Step 3: Use Courage to Address Bias

1. **Choose a Courage Skill.** Choose one skill from the Courage Skill Builder (pages 60–75) to work on with your team. If appropriate, ask for your team's input on which skill to choose.

2. **Run a Courage Skill Builder Session.** Take 15 minutes in a team meeting to review the skill following the directions in the Courage Skill Builder. Ask team members to commit to using the skill.

3. **Follow Up on Commitments.** Decide on a realistic plan for taking action. Track progress through team meetings or 1-on-1s.

4. **Run More Courage Skill Builder Sessions.** As you make progress, move on to others skills. Keep going!

Courage to Identify

PAUSE: QUESTION IT

Read the definition below.

Bias happens at the speed of thought. When we check our thinking, we recognize biases that might be impacting our decisions and reactions.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a time when you acted in a biased way and realized it afterward. What would have helped you catch yourself before you acted?

Review the tips below. Discuss how they can help you identify and deal with bias.

Pause before you act.

Ask yourself:

- What am I thinking? What am I feeling?
- Am I being reactive?
- What's causing my reaction?

Note any commitments:

Application Example

A leading professional-services firm mandates mindfulness training for all high-potential personnel. Mindfulness is a skill that helps us be aware of our thinking.

Courage to Identify

SEEK TO UNDERSTAND

Read the definition below.

When we seek to understand ourselves and others, we learn about our biases and theirs. We begin to cultivate connection, see past bias, and value different perspectives.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a conversation you had with someone where you had very different points of view. What would have helped you understand each other better?

Review the tips below. Discuss how they can help you identify and deal with bias.

Distinguish between facts and feelings.

Use empathy and curiosity to understand what others are thinking.

Ask: What's important here? Why?

Note any commitments:

Application Example

A major financial company provides opportunities for groups of 40 employees to form listening groups to talk about challenges in creating an inclusive workplace.

Courage to Identify

CHECK ASSUMPTIONS

Read the definition below.

Some assumptions are based on feelings, opinions, and biases. When we examine our assumptions, we can see biases in our thinking.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a time when someone (maybe you) made an assumption that turned out to be wrong. What was the impact on the people involved?

Review the tips below. Discuss how they can help you identify and deal with bias.

Ask yourself:

- What are the facts?
- What am I missing?
- What have I made up to fill in the gaps?
- What assumptions are others making?

Note any commitments:

Application Example

In a state with 80% unemployment for people with cognitive and intellectual disabilities, a manufacturing firm launched a disability internship program, broadening their pipeline to drive results and also addressing a societal need.

Courage to Identify

LEARN

Read the definition below.

"Solving" for bias is not a one-time endeavor. It is a learning process where we commit to explore the impact of bias in our lives, organizations, and society.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a time when you learned something new and it changed your view about a previously held belief. What helped you change how you saw the situation?

Review the tips below. Discuss how they can help you identify and deal with bias.

Commit to learning about bias. For the next three months:

- Listen to podcasts on bias; read articles or books on bias.

- Choose one bias to notice and learn more about it.

- Invite others to learn with you.

Note any commitments:

Application Example

A healthcare organization provides unconscious bias training and holds annual follow-up conferences and seminars to address different components of bias.

Courage to Cope

PRIORITIZE SELF-CARE

Read the definition below.

Being the subject of bias can take a toll on well-being. It is important to effectively deal with any associated physical stress or emotional distress.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a time when you were experiencing negative effects of bias. What could you have done to take the space and time you needed to recover?

Review the tips below. Discuss how they can help you identify and deal with bias.

Take a break to clear your mind.

Ask yourself:

- How do I need to take care of myself in the short term?
- How do I deal with this for the long term?

Note any commitments:

Application Example

An organization has "focus rooms"—individual-size conference rooms to give people access to private space. The company also provides a wellness program.

Courage to Cope

PROACTIVELY CHOOSE A RESPONSE

Read the definition below.

When we react to situations, our responses can be impulsive and often make the problem bigger. When we are proactive, we choose a better response.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a time when you said something or did something you regretted afterward. If you could relive that time, what would you say or do differently?

Review the tips below. Discuss how they can help you identify and deal with bias.

Identify a bias you experience often.

Plan what you can do or say when you face this bias in the future.

Use the response and keep improving it.

Note any commitments:

> **Application Example**
>
> A public-sector agency has built several approaches for employees to seek confidential and expert advice on how to handle difficult situations related to bias. So when an incident occurs, employees can proactively seek guidance on how best to respond.

Courage to Cope

GET A COACH OR MENTOR

Read the definition below.

Coaches and mentors give us the gift of their experience. They share their lessons about how to identify and cope with bias.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a coach or mentor in your life who helped you deal with a difficult situation. What did they do that helped you?

Review the tips below. Discuss how they can help you identify and deal with bias.

Choose someone who can help you see other perspectives and who has effectively coped with bias.

Commit to regular conversations for at least a six-month period.

Note any commitments:

Application Example

In one academic organization, staff members of color were feeling disconnected and unsupported. The university set up a mentoring program across demographic profiles and roles.

Courage to Cope

SHARE YOUR STORY

Read the definition below.

Each of us has our own stories. When we are courageous and share our story, we better understand ourselves.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a story about a bias you held in your life. What happened? What's the key lesson you learned?

Review the tips below. Discuss how they can help you identify and deal with bias.

Capture stories of bias in your life.

Help others cope by sharing how you cope.

Note any commitments:

Application Example

An individual started a photo project. It has grown to more than 20 million global followers on social media. The personal stories provide glimpses into the lives of others, helping people feel heard and building connections around the world.

Courage to Ally

TEAM UP WITH OTHERS

Read the definition below.

Allies recognize that while they might not be a member of a marginalized group, they can team up to support those who are experiencing bias and make a significant impact.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a time when you saw a group make an impact by teaming up around something they cared about. This could be a group you were involved with or that you benefited from.

Review the tips below. Discuss how they can help you identify and deal with bias.

Identify a bias that impacts others in your organization.

Find others who want to address this bias.

Identify ways to educate others of the impact of this bias.

Note any commitments:

Application Example

A government agency ensures that sponsors of Employee Resource Groups (ERGs) are not members of the underrepresented group the ERG focuses on. This is a best practice for buildng inclusion initiatives that work.

Courage to Ally

OFFER SUPPORT

Read the definition below.

Allies listen and offer support. It is often incredibly impactful for those experiencing bias to know they have the support of a friend or colleague to vent to, and be heard and reassured by.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a time when a colleague was struggling with something. Did you offer support? If not, what held you back? If so, how did that feel?

Review the tips below. Discuss how they can help you identify and deal with bias.

Notice who needs support to address bias.

Use empathy and curiosity to understand the issue.

Act as a thinking partner.

Note any commitments:

Application Example

Research has repeatedly shown a concrete link between having a best friend at work and the amount of effort employees expend in their job.

Courage to Ally

BE A COACH OR MENTOR

Read the definition below.

Mentoring is one of the most consistently effective programs for addressing bias in organizations. It sparks engagement and increases contact between different groups.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of the impact of a coach or mentor in your life. How could you help others by coaching them?

Review the tips below. Discuss how they can help you identify and deal with bias.

Offer to be a mentor or coach to others and commit to regular conversations.

Learn by listening.

Share your experiences as appropriate.

Note any commitments:

Application Example

A global financial institution noticed female managing directors were not being promoted to senior levels and were leaving to work for competitors. The organization responded by creating a mentoring program which paired executives with mid level women leaders to ensure these women had influential advocates for promotion.

Courage to Ally

AMPLIFY OTHERS' VOICES

Read the definition below.

Amplifying others' voices helps ensure that people who were previously ignored get heard. When someone who is sometimes ignored makes a point in meetings, others can repeat it to give credit to the originator. Amplifying others' voices ensures that everone is heard.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a time when you felt unheard. Was there someone who spoke up for you and drew attention to your idea? If so, how did it feel?

Review the tips below. Discuss how they can help you identify and deal with bias.

Notice trends in meetings and decisions. Is anyone being left out?

If someone is left out, reinforce their ideas and amplify their voice.

Note any commitments:

> ### Application Example
> Women in a government organization noticed their contributions weren't being heard in critical meetings. They committed to amplify each others' voices.

Courage to Advocate

ENACT GROUP STRATEGIES

Read the definition below.

Many voices can make much more progress than one. Group strategies help us make a difference and address the negative impact of bias.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a time when a company changed its policies or practices because of a group effort from employees. What was the impact on performance?

Review the tips below. Discuss how they can help you identify and deal with bias.

Set group goals for making progress on a specific bias.

Share best practices for addressing bias.

Note any commitments:

Application Example

A not-for-profit organization convenes executive leaders to advocate for, and strengthen, corporate inclusion strategies. Leaders pledge their commitment and share best practices to cultivate more inclusive workplaces.

Courage to Advocate

WRITE ABOUT YOUR EXPERIENCE

Read the definition below.

Curiosity and empathy are often born from a story. Stories of how real people have been affected by and addressed bias inspire others.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of the last time you heard someone's personal story and it changed how you saw things. What about the story made an impact on you?

Review the tips below. Discuss how they can help you identify and deal with bias.

Tell your story to help people understand your context and perspective.

Share how you are addressing bias on appropriate media.

Note any commitments:

Application Example

With so many formats for social media—140 characters or less, video, images, podcasts, and writing—there are millions of stories of people dealing with bias and advocating for change. These stories help us relate to different experiences and realities.

Courage to Advocate

ORGANIZE NETWORKS

Read the definition below.

One of our primal needs is to belong to groups or networks. Research has shown that building networks to bring groups together can counter the impact of bias.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a time when you were the "only" in the room—the only in your profession, the only... What did it feel like? How is that different from when you are one of many in a group?

Review the tips below. Discuss how they can help you identify and deal with bias.

What biases do you want to explore with others?

What networks exist at work or in your community that you could join?

What new networks could you create?

Note any commitments:

Application Example

Employee Resource Groups (ERGs, also called Affinity Groups) are designed to ensure that every employee feels supported. ERGs tie their goals to the goals of the organization.

Courage to Advocate

SPEAK UP

Read the definition below.

Directly addressing a biased comment or action can help you and the other person realize their behavior may cause unintended harm.

Spend 5 minutes to explore and discuss this strength using the following prompt:

Think of a time when you spoke up about something important that others were not aware of. What made it easy or hard? What was the response?

Review the tips below. Discuss how they can help you identify and deal with bias.

Confront bias with courage and consideration.

Most people don't intend to be biased, so assume positive intent.

Note any commitments:

Application Example

Executives in many organizations communicate their interest in having people speak up clearly and often. Having senior leaders endorse this behavior can make a lasting impact.

WORKPLACE EQUITY
A Holistic Approach

DISCLAIMER

These presentations contain resources that are provided for the user's convenience. The inclusion of these materials is not intended to reflect its importance, nor is it intended to endorse any views expressed, or products or services offered. These materials may contain the views and recommendations of various subject matter experts as well as hypertext links, contact addresses and websites to information created and maintained by other public and private organizations. The opinions expressed in any of these materials do not necessarily reflect the positions or policies of the U.S. Department of Education. The U.S. Department of Education does not control or guarantee the accuracy, relevance, timeliness, or completeness of any outside information included in these materials
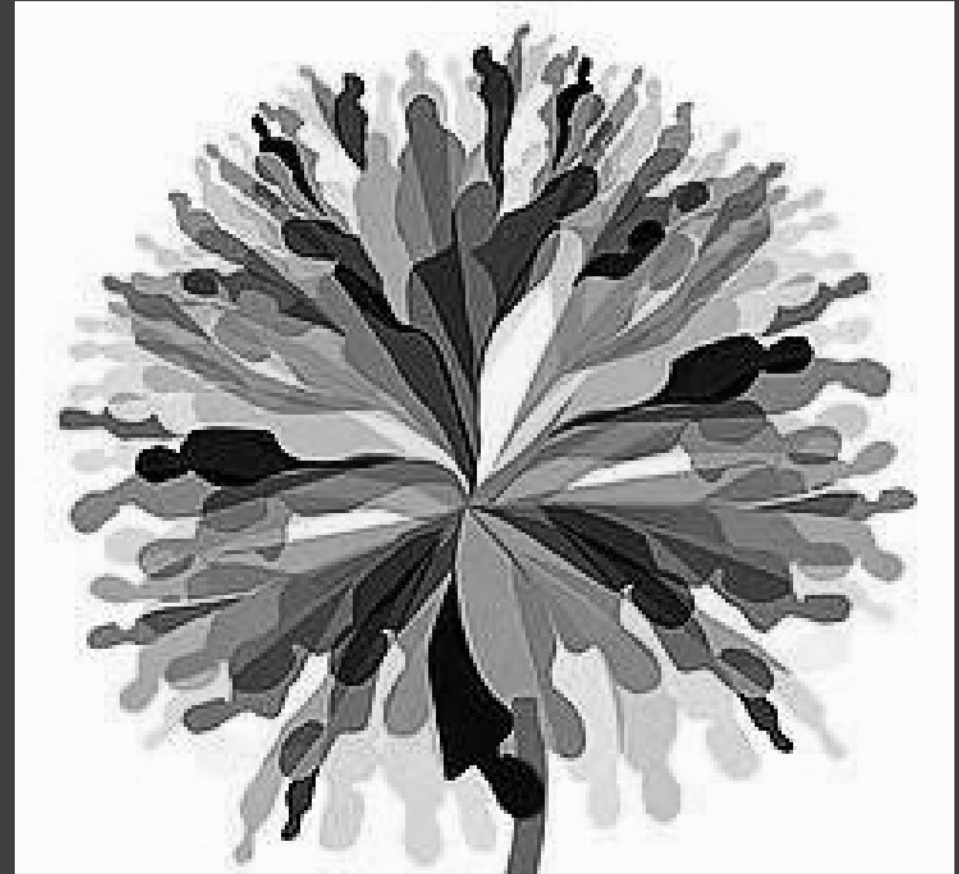
AGENDA

DIVERSITY

- What is Diversity
- Diversity Statement
- Why Have Diversity
- Diversity In The Organization
- Workforce Data

EQUITY

- Adverse Impact
- Pay Equity

AGENDA CONTINUED

INCLUSION
- Unconscious Bias
- Emotional Intelligence

ACCESSIBILITY

FEVS
- Survey Results
- Leadership Support
- Succession Planning

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What is Diversity

[Source: Gardenswartz & Rowe, Diverse Teams at Work (2nd Edition, SHRM, 2003]

DIVERSITY STATEMENT

We define workforce diversity as a collection of individual attributes that together help agencies pursue organizational objectives efficiently and effectively. These include, but are not limited to, characteristics such as national origin, language, race, color, disability, ethnicity, gender, age, religion, sexual orientation, gender identity, socioeconomic status, veteran status, and family structures. The concept also encompasses differences among people concerning where they are from and where they have lived and their differences of thought and life experiences.

Government-wide Diversity and Inclusion Strategic Plan 2011

WHY HAVE DIVERSITY

- **Changing Demographics**
- **Global Marketplace**
- **Increased Creativity**
- **Social Change**
- **Better Return on Investment**
- **Legal Obligations**

A diverse workforce is critical to achieving the vision of excellence in government services by providing the OIG with the necessary knowledge, experience, and capability to effectively provide value-added audit, investigative, and other services. (D&I Strategic Plan FY2019 – 2022)
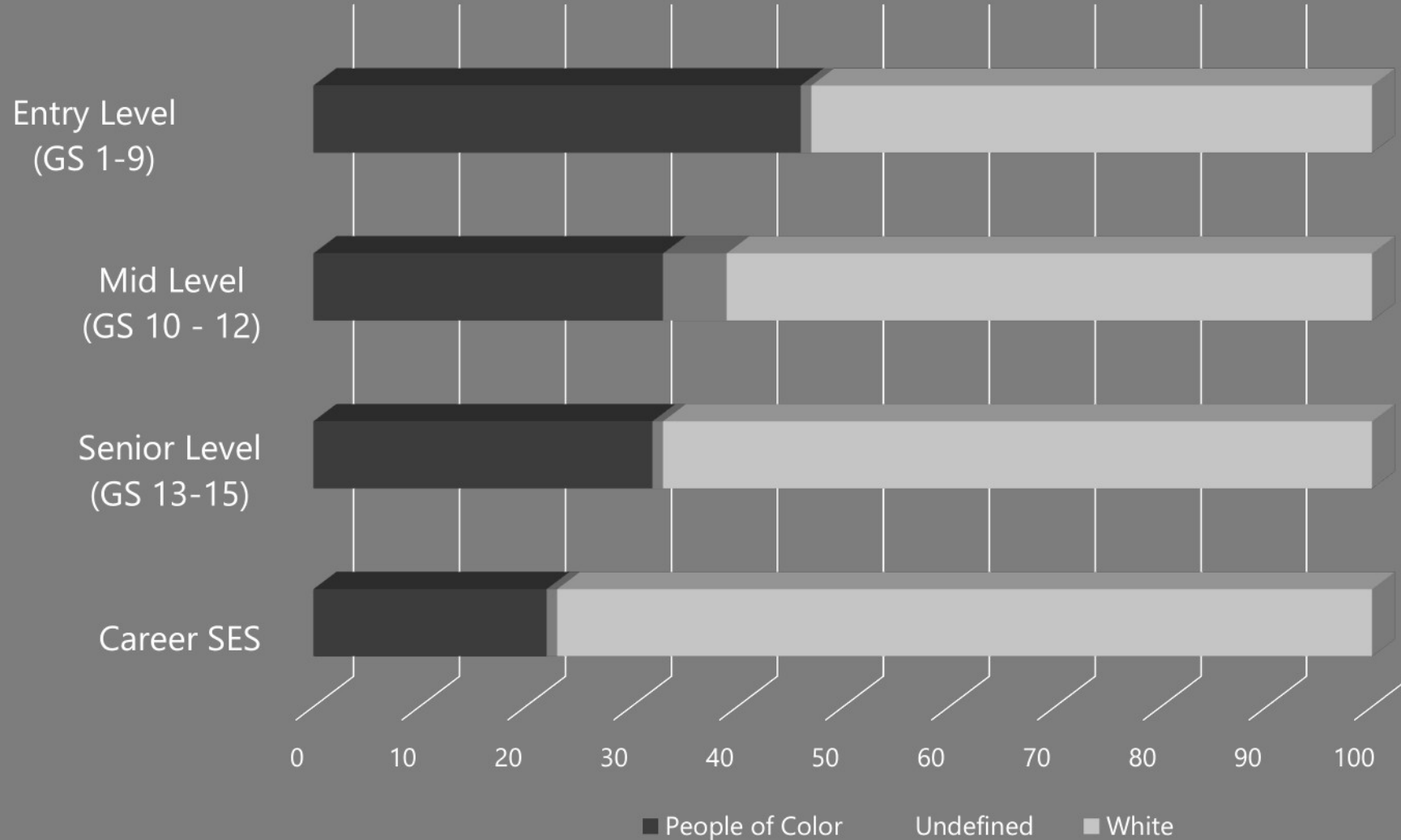
DIVERSITY IN THE ORGANIZATION

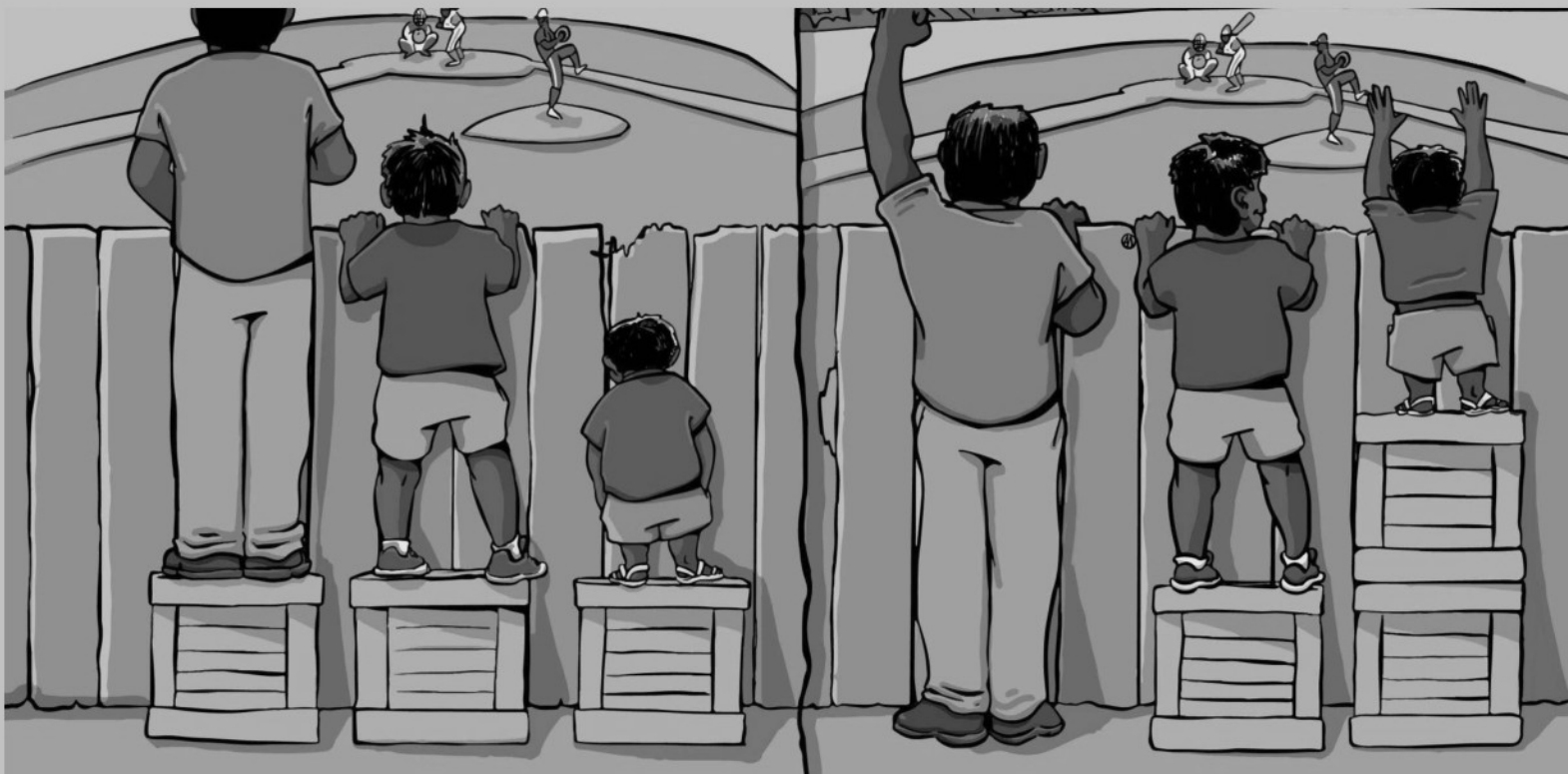**Recruitment**

Hiring

Promotions

Training and Development

This Photo by Unknown Author is licensed under CC BY-SA-NC

EQUITY

ADVERSE IMPACT

In order to avoid adverse impact, the protected group should be at least 80% of the non protected group.

PAY EQUITY

Criteria employers use to set pay must be race and gender neutral.

Lilly Ledbetter Fair Pay Act 2009

The act amends Title VII of the Civil Rights Act of 1964 and states that the 180-day statute of limitations for filing an equal-pay lawsuit regarding pay discrimination resets with each new paycheck affected by that discriminatory action. The law directly addressed *Ledbetter v. Goodyear Tire & Rubber Co.* (2007), a U.S. Supreme Court decision that the statute of limitations for presenting an equal-pay lawsuit begins on the date that the employer makes the initial discriminatory wage decision, not at the date of the most recent paycheck.

INCLUSION

Inclusion is a sense of belonging. Inclusive cultures make people feel respected and valued for who they are as an individual or group. People feel a level of supportive energy and commitment from others so that they can do their best at work. Inclusion often means a shift in an organisation's mind-set and culture that has visible effects, such as participation in meetings, how offices are physically organised or access to particular facilities or information.

Global Diversity Practice
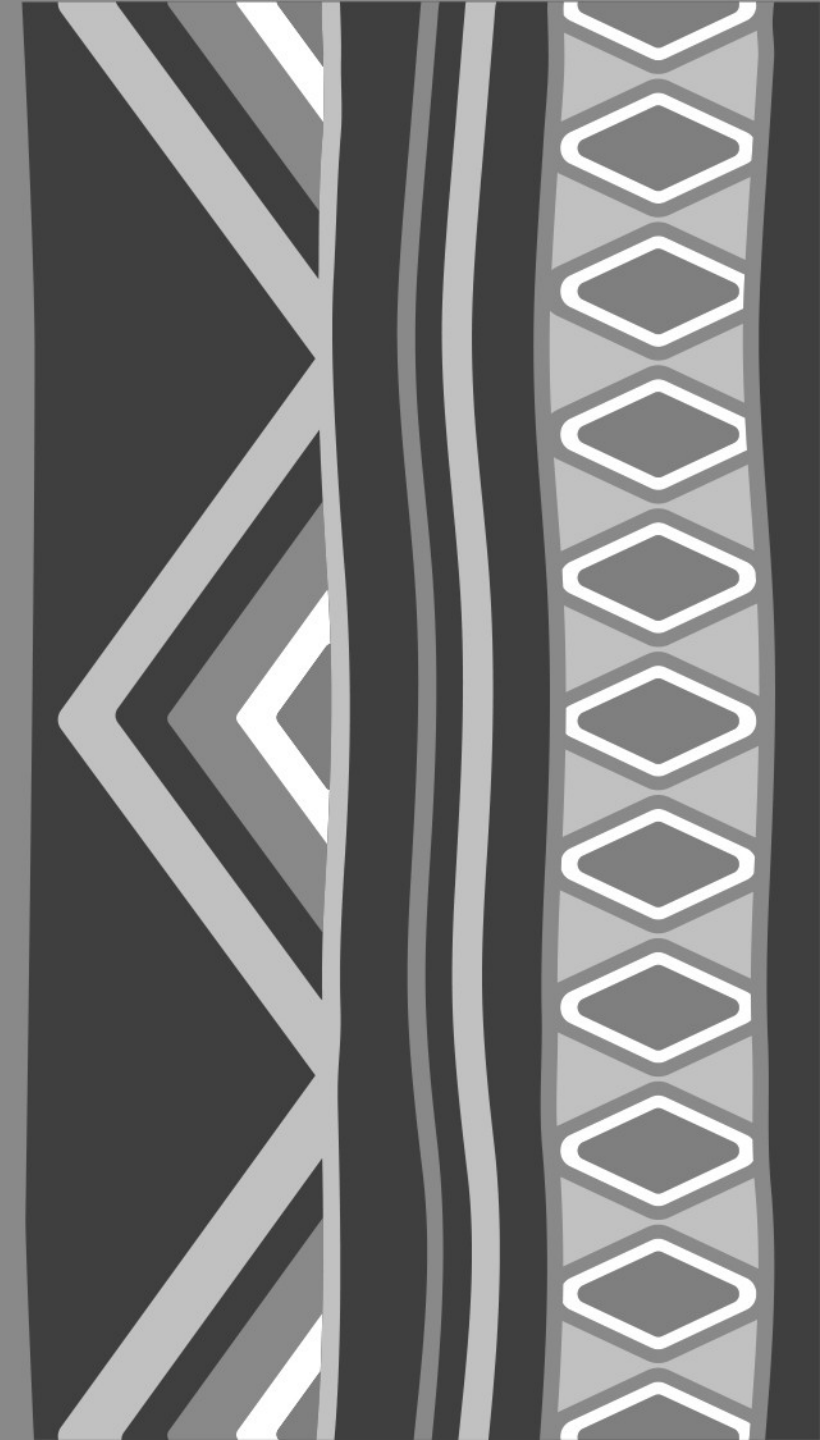
UNCONSCIOUS BIAS

EMOTIONAL INTELLIGENCE

The capacity to be aware of, control, and express one's emotions, and to handle interpersonal relationships judiciously and empathetically.

ACCESSIBILITY

The design, construction, development, and maintenance of facilities, information and communication technology, programs, and services so that all people, including people with disabilities, can fully and independently use them.

FEDERAL EMPLOYEE VIEWPOINT SURVEY (FEVS)

from Partnership for Public Service (ED)

Overall Engagement Score

The overall rankings are determined by the Best Places to Work employee engagement score, calculated by the Partnership for Public Service and Boston Consulting Group.

The index score is not a combined average of an agency's category scores. It is calculated using a proprietary weighted formula that looks at responses to three different questions in the U.S. Office of Personnel Management's Federal Employee Viewpoint Survey. The more the question predicts intent to remain, the higher the weighting.

- I recommend my organization as a good place to work. (Q. 17)
- Considering everything, how satisfied are you with your job? (Q. 36)
- Considering everything, how satisfied are you with your organization? (Q. 38)

Category	Rank	2020	2019	2018	2017	2016	2015	2014	2013	2012
Engagement Score	23 of 25	57.9	43.7	47.3	59.7	59.8	61.3	58.8	57.6	56.8

SURVEY RESULTS

Statement	Governmentwide	Dept of Education
I know how my work relates to the agency's goals.	87.1%	84.4%
The people I work with cooperate to get the job done.	84.1%	87.1%
My work unit has the job-relevant knowledge and skills necessary to accomplish organizational goals.	81.9%	81.1%
Overall, how good a job do you feel is being done by your immediate supervisor?	78.1%	80.5%

SURVEY RESULTS

Statement	Governmentwide	Dept of Education
In my work unit, steps are taken to deal with a poor performer who cannot or will not improve.	42.3%	43.2%
In my organization, senior leaders generate high levels of motivation and commitment in the workforce.	50.7%	41.1%
My organization's senior leaders maintain high standards of honesty and integrity.	61.0%	47.4%
I have a high level of respect for my organization's senior leaders.	61.8%	48.1%

LEADERSHIP SUPPORT

The leadership of the organization has to make DEIA a priority of the organization. As stated in the Executive Order on DEIA in the Federal Workforce. **The federal government should be a role model for DEIA, where all employees are treated with dignity and respect.**
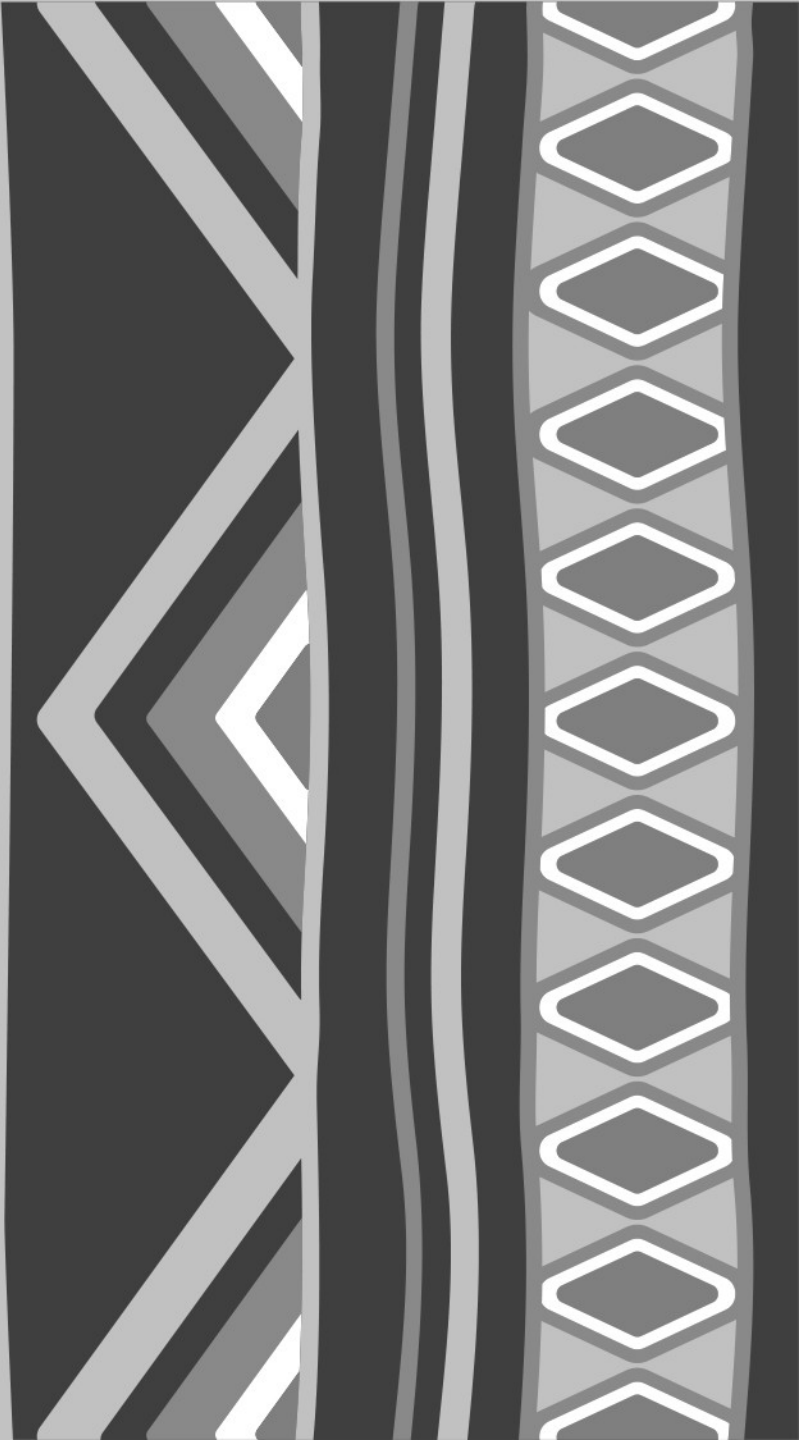
SUCCESION PLANNING

A process for identifying future leaders within the organization and preparing them for those roles.

Resources

Department of Education • Ranking Detail • Best Places to Work in the Federal Government

Deloitte - the equity imperative

Executive Order 13583

Executive Order on Diversity, Equity, Inclusion, and Accessibility

Government-Wide Diversity and Inclusion Strategic Plan 2011

Racial diversity in the federal government

Valerie Alexander: How to Outsmart Your Own Unconscious Bias | TED Talk

QUESTIONS

Let's discuss your questions and possible next steps to creating workforce equity.

Feel free to unmute or put your questions in the chat box.