PUTTING THEORY INTO ACTION:
A Beginner's Guide for Understanding and Breaking Down Interpersonal and Institutional Systems of Inequity

INTERPERSONAL UNDERSTANDING

1. **Take a Bias Assessment** – *and* agree to share and discuss results with *a close colleague* in advance.

These are often referred to as Implicit Association Tests, and the purpose isn't to pass judgement on the test taker. They're meant to be a tool through which we can learn about and begin to unpack our own biases. *Everyone* has them – and sometimes we're aware of them, and other times we're not. This self-work is a fundamental prerequisite to break down inequities on both an interpersonal and an institutional level. Before you can take a proactive role in solving for inequities, you need to understand what perspectives and blind spots that you bring along with you into that work.

The reason Step One emphasizes doing this work with a close colleague is because:

- It's incredibly helpful to go through this experience with someone,
- There needs to be a baseline of trust and empathy when sharing and talking through these incredibly personal results, and
- As was pointed out in the webinar, asking marginalized folks to take on this work for you is emotional labor. Your internal work needs to happen without asking for additional work from those who experience these inequities as part of their identity.

Here is a recommended approach to Step One:

1) Do some **self-reflection** prior to the test(s) themselves: Where do you think your blind spots are? Why? Are you aware of some of your biases?

2) **Take the assessments**. We'd recommend the one run by [Project Implicit] – hosted by Harvard, in collaboration with several other research universities.[1] It's incredibly comprehensive and includes assessments on 15 different types of implicit biases.

3) **Discussion**: Schedule a time when both you and your colleague feel relaxed-ish. (This is *not* the conversation to schedule prior to a massive presentation or when you feel stressed and incredibly tight on time...) The conversations that result can (and should) go in any number of directions. However, we'd suggest starting with the prompts here:

   a. Were your assumptions about your biases correct or not?
   b. What did you learn?
   c. Which result was the most surprising?
   d. Which result were you the least comfortable with? How come?
   e. Now what? (Just kidding, go onto Step 2!)

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[1] https://implicit.harvard.edu/implicit/takeatest.html

2. Perspective Check and Belonging Assessment

Following your bias/associations assessment and discussion, Step Two requires some internal reflection. The goal of this step is to get you to start thinking about how to go from big picture or abstract concepts (i.e. ideological or institutional power structures) to 'why this really matters' for people around me on a daily basis.

What does it mean to you when you feel like you 'belong'? Try and define it in a single word. Does belonging make you feel:

- valued,
- supported,
- accepted,
- comfortable,
- that you have influence or control over decisions that impact you,
- safe in providing your opinion?

Why is belonging such a powerful feeling?

Now ask yourself:

- Are there behaviors that you've witnessed that would impact how (or if) others – who don't share your same identity – feel like they 'belonged' in your workplace? What are they?
- How are some of the ways that marginalized folks (women, persons of color, differently abled, etc.) might not feel welcome or that they 'belong' within the current structures or culture of your organization? (i.e. 'meetings often happen during family/dinner hour, this would make it harder for single or working parents to attend.')
- If you're stumped here, reference the slide on "Interpersonal Examples" from Slide 9 of Aparna's presentation. There's plenty there to get started!

YOUR RESPONSIBILITIES:
- Your own education and actions in the environment of which you are a member.

RED FLAGS TO AVOID:
- Asking marginalized folks in your organization to take on emotional labor as a part of your process.
- Assuming Steps #1 and #2 are *the only* steps to take – they are just the beginning.

INSTITUTIONAL ASSESMENTS

3. Organizational Landscape Assessment – Taking account of ongoing efforts and stakeholders.

There's power in numbers, and culture change requires a lot of buy-in at every level of an organization. Organizations – regardless of industry or longevity – tend to have people operate in silos. This structure presents challenges for teammates across that organization to come together to advance shared efforts. To be effective in creating change, one of the first things that should be done is to take a full, organization-wide account of who is doing this work, in what capacity, and where in the organization are they located.

This may sound simple or quick to accomplish, but be assured it is not. Most companies do not have a comprehensive list of all the individuals and teams that are engaged in DEI work. The purpose of Step Three is to create one. As in...literally: <u>Write down what you find and include points of contacts for each</u>. (*Better yet, make this a living document that can serve as an internal and transparent resource for folks at your organization.*)

NOTE: This *can* be done as an individual activity but will be *far more effective* in the long-term—and begin to create connections and cross-functional relationships—if you begin this as a collective enterprise. Also, *invite people in* and explain your 'why', as you begin this work.

Here are some questions to answer as you begin this landscape assessment:

1) Start with the obvious questions: Are there groups doing this on your team(s)?
2) Are there powerful and well-received campaigns//launches//initiatives that you've seen over the years that featured the themes of representation or equality at their core? (i.e. in marketing or retail or product). Ask around to find out who led the work.
3) How many EDI initiatives or groups exist at your organization?
   Think broadly here: Are there formal committees or employee groups? Affinity or ERG spaces? Is there a dedicated team?
4) For organizations with a global or international footprint: Is corporate headquarters talking across Markets? How is this work showing up in different countries and local teams?
5) Is there an executive or senior leader who sponsors DEI work currently?

4. Operations + Practice Assessment – How does power operate here?

Question: So, what are you supposed to do with the resource you created in Step Three?

Answer: Use it as the foundation to begin the hard work. You need to know what structures exist before you can unpack how inequity and power works within them.

This step is trickier than the previous one. It requires not just taking account of *what groups* and work exist, but digging deeper into the practices and norms of *how those groups operate*.

NOTE: This step should <u>not</u> be undertaken individually. This work requires collaboration – with particular attention to how underrepresented or marginalized individuals experience this work at your organization. [*If you identify as part of the dominant demographic group within your organization, please read the 'YOUR RESPONSIBLITIES' in green at the end of this playbook*.]

You should invite individual representatives from all the groups from the Step Three assessment to participate in this process, and the session(s) should be a mix of collaborative discussion and active listening. However, because many sensitive topics and personal experiences will be voiced here, it is <u>not</u> recommended that you record these sessions. Instead, take aggregate and anonymized notes.

As you begin your discussion and assessment of the groups and work-to-date, here is a framework to evaluate the practices embedded within those structures and determine how power operates within them. It is by no means comprehensive, but should serve as a solid starting point.

The guiding question behind all these prompts is:

When people come together are these initiatives and spaces breaking down inequities or reinforcing them?

- What are your workplace's current practices related to DEI? Are they connected with one another, or operating separately within teams?
- How does communication happen within the company on these topics/initiatives?
- What time do the groups meet? (Who does this leave out, inadvertently or not?)
- Who can bring up topics in meetings? Who controls the resources? How do folks get access to these groups or spaces?
- Are there gatekeepers to this information (if so, who are they)?
- Are groups closed (and require access to be granted)? If closed, is that to create a safe space for an affinity group, or does it serve as an impediment to access?
- If groups are open for all to join what are the positive and negative consequences of that format? (Does it create a 'collective action problem'? Is it so fragmented/organic that no one knows what the other participants are doing?)
- Who participates in this work at your company? Is it mostly voluntary? Is it part of people's official job descriptions? Is it seen as 'extra' work? Is it primarily underrepresented individuals who are taking on these responsibilities?
- If you're stumped here, reference the slide on "Institutional Examples" from Slide 10 of Aparna's presentation. There's plenty there to get started!

5. Reaching Out and Elevating the Issues: Start connecting initiatives and people across your organization and invite leadership to participate.

Now that you've dug into *some* of the ways that power and inequity manifest themselves in Step Four, what are short term and long-term challenges you can begin to solve for?

Again, collectively, start thinking about solutions and approaches to the following questions. Write them down. Assign ownership. Schedule check-ins for report outs and to promote visibility on efforts. Celebrate wins!

In the short term:
- Are there groups (or individuals) working on similar initiatives who can pool resources and efforts to accomplish more together?
- How can communication across initiatives and groups be improved?
- Can meeting times be adjusted (or alternated) so that more people can attend?
- Can invitations or slack channels be made more visible or accessible?
- What resources and decisions are under the control of the current stakeholders, and can result in immediate change?
- How do projects and topics get introduced? Can this process be made more transparent or open?
- Can this work be formally incorporated into individual goal setting? How do we shift this from 'extra work' to vital work that is part of a job description?

In the long term:
- What resources are needed to solve for organization-wide inequities? A new hire? A (larger) budget?
- What are the (collective) group's top priorities? (And how are we determining those so that as many voices and experiences as possible are represented?)
- Who else needs to be part of this conversation for the work to be elevated and the resources to be dedicated to achieving these goals?

Start (and continue) reaching out and managing up. Talk to leadership. Invite them to the conversations. Elevate the voices and individuals who don't have that level of access or a platform to be heard.

YOUR RESPONSIBILITIES:
- Listen to those doing this work at your organization – particularly marginalized folks taking this on as extra work. What's their experience been like? What policies or cultural norms are the most problematic?

  TO BE CLEAR: This means *listening* when this information is offered *voluntarily* by individuals who are impacted by inequities – and taking them at their word that what they experience is true and valid. Often this also means paying attention to non-verbal cues: Do all the women in a certain meeting sit on the periphery of the room, and not at chairs around the table? Is there only one person of color on a recurring meeting invite, but they've stopped attending sessions without explanation? Why might that be the case?

- Pay attention to context and listen to those *when* they offer up their experiences. If you are new to this work, *that* is your invitation to a deeper conversation – not before. Undertaking this work should not be an invitation to solicit information or to ask marginalized individuals to educate you.
- Engage thoughtfully. Respectfully. Individually.

RED FLAGS TO AVOID:
- Tokenization
- Assumptions of others' perspectives. Do not assume that all marginalized groups share the same experiences.