DIVERSITY & EQUITY & INCLUSION FOR TRAINERS
FOSTERING DEI IN THE WORKPLACE

MARIA MORUKIAN
DIVERSITY 
EQUITY & 
INCLUSION 
FOR TRAINERS 

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For my future peace teachers, Rosalie and Lilia, and my past peace teachers, Joni and Val. From one generation to the next, you inspire me every day to make the world a little bit better than I found it.
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Introduction

If there was ever an example of the adage, “looks can be deceiving,” my father was it.

Varujan “Val” Morukian was short in stature with thinning gray hair, wire-framed glasses, and a creased olive-skinned face that looked vaguely “ethnic” to most people in the suburban Detroit neighborhood where I grew up. He walked around with a friendly smile and a vague look in his eyes. He was hard of hearing, and between that and his foreign accent people often assumed he didn’t understand them or was not “all there.”

The truth was that my father was paying very close attention to everything. His intellect was sharp. His curiosity was endless. His life story could have been a script for an epic movie. What people “saw” was by no means representative of the courageous, complex human underneath.

My family were Armenians who were forced to flee Turkey in the 1920s. As refugees they settled in Cuba, where my father was born. He was raised by an incredible, resilient single mother and two older sisters. In Havana he often sat in the plaza with the old-timers while they played dominos and spun stories. He visited with Blanca, an old Afro-Cuban woman who practiced Santeria. She was feared by the other neighborhood kids as a bruja (witch) but was loved by my father. After coming to the US, he served in the army as a sniper in the Korean War, earning the Bronze Star for his valor. He worked as a bartender and
a bowling alley attendant, and on one eventful night he stood in as a security guard for Jimmy Hoffa. He earned a graduate degree from the University of Michigan. He became a history teacher and changed the lives of thousands of struggling teenagers in Detroit public schools over his 30-plus-year career.

My father was an endless learner. He was continually curious about other people and saw beyond immediate impressions, finding something to admire about everyone. He showed genuine interest and compassion for everyone equally. In return, people were their best selves with him. Struggling students improved. Neighbors flocked to our house when they needed a coffee and confidential conversation. Grocery store clerks, waitstaff at restaurants, and auto mechanics greeted him by name with bright smiles, handshakes, and hugs. I learned from him that when we treat others with dignity and warmth, they typically respond in kind.

**Why Diversity, Equity, and Inclusion?**

Throughout my career, I have been drawn to exploring how our unique identities influence our work and personal lives, and how diverse combinations of people contribute to organizational success. I have also seen the corrosive effect of inequality and systemic oppression on organizations and society as a whole.

As a trainer and facilitator, my work has led me to believe deeply in the importance of challenging people to look at the world from various perspectives, not only to build connections with others but also to gain wisdom. As an organization development practitioner, I have learned that change only happens when DEI becomes a core part of the organizational structure and culture, when it is recognized by all as critical to the organization’s sustainability.

**Why This Book?**

Diversity, equity, and inclusion work is incredibly complex. There is not a clear and well-worn path to follow for those who want to learn. Unlike more technical professions, DEI feels more amorphous. Many people in
the space of DEI have had to forge their own way, learning as they went. Although there are now benchmarks for DEI success and best practices to follow, the field is continuing to evolve, and there is no centralized certifying body for DEI to ensure that practitioners have a shared set of skills and knowledge.

Our society is also at a turning point that demands individuals and institutions focus on DEI as an imperative for sustainability. Our population is more demographically diverse than ever, and social polarization has continued to push people into identity-based camps that foster distrust, disregard, and hatred.

I began outlining this book in early 2020, when the COVID-19 pandemic had just begun. While writing the book, I witnessed the aftermath of the murders of George Floyd, Ahmaud Arbery, Breonna Taylor, and countless others. Many White people started to wake up to the everyday oppression and terror that Black people experience. Marches and protests supporting Black Lives Matter took place all across the US and around the world. Books like Ibram X. Kendi’s How to Be an Antiracist and Robin DiAngelo’s White Fragility flew off the shelves as folks grappled (many for the first time) with the truths of White supremacy and racism in the US. Requests for DEI training and consulting surged. The year 2020 really pushed the “E” piece into high gear and prompted organizations to take a more serious look at themselves and what gaps they had in terms of diversity, equity, and inclusion. Many of the leaders I have encountered in the last year have had a wake-up call and realized they have to prioritize DEI in a more systemic way than just a one-off workshop. Employees’ voices have grown louder, as have the voices of consumers, pushing leaders to engage in more genuine efforts to address systemic inequalities.

This awakening has been both encouraging and frustrating to many veterans of DEI work. On the one hand it brought a renewed energy and focus, with more of an invitation to engage in uncomfortable conversations around identity and inequality than has been tolerated in the past. However, it has also been frustrating for three reasons:
• **DEI work isn’t new.** Racism, sexism, and systemic oppression didn’t disappear and suddenly reappear in the last few years. People of color feel frustrated with White people who appear shocked that racism still exists. They have been trying to get White people’s attention for years to point out this is happening, only to be dismissed or ignored. Women are fed up with hearing that the reason they are not promoted is because they lack confidence, when in reality they are consistently judged by a different set of expectations than their male colleagues. Although progress has been made, people from marginalized identity groups continue to face challenges in their organizations and society.

• **DEI work takes years of learning and practice.** A lot of very caring, well-intentioned people who want to be part of the solution are trying to get into DEI training without developing the skills necessary to do the work well. Some may have deep training experience but have never done DEI training. Some have been involved in social justice activism but have never facilitated dialogues on DEI issues. This is the equivalent of assuming a dentist can perform heart surgery. One set of skills simply won’t transfer and can do more harm than good.

• **DEI work requires a commitment to self-reflection.** DEI training can become problematic when a trainer has not taken the time and effort to explore their own understanding of and relationship with DEI issues. Even seasoned DEI practitioners can experience emotional reactions in a training session, which if not handled well may disrupt or even derail the learning experience. Beyond developing the knowledge and skills to train others in the core concepts of DEI, practitioners must do their own work. DEI work requires you to continuously reflect on your own beliefs and blind spots. It’s deeply humbling work in which you have to be willing to acknowledge your own individual privilege and biases. You have to be willing to make yourself
vulnerable to others, sharing your personal stories and owning your mistakes. You have to be open to challenging and changing your perceptions.

**What to Expect in This Book**

This book will guide you through the process of developing your skills as a DEI trainer, with a focus on embedding DEI into the broader organizational fabric. Each chapter includes reflection questions and worksheets to support your ongoing learning and development.

Chapter 1 provides an overview of core concepts related to DEI, a brief history of the evolution of DEI work, and different philosophical underpinnings.

Chapter 2 explores processes for assessing the need for DEI training, including methods for data gathering and analysis to provide relevant training solutions.

Chapter 3 provides guidance on how to design and develop effective DEI-specific training, considering the elements of the organizational culture and external forces influencing DEI. This chapter also explores a continuum of awareness and skills related to DEI to help customize training for specific audience needs.

Chapter 4 discusses how to embed DEI practices and content into any training program, regardless of subject matter. This includes designing representative, inclusive, and accessible content, as well as ensuring the training delivery accommodates the needs of diverse learners.

Chapter 5 explores the complexities of delivering DEI training, and provides guidance on how to facilitate dialogues on DEI and handle challenging situations.

Chapter 6 lays out ways to promote continuity and collaboration to ensure a sustainable outcome, including practices for strategy, continuity, and accountability.

Chapter 7 explores DEI from a global context, providing insights and recommendations for ensuring DEI training is relevant in different cultures and regions.
Chapter 8 provides trainers with an opportunity to engage in their own DEI self-exploration. It is imperative that DEI trainers continuously reflect on and refresh their learning.

The DEI field needs more skilled practitioners who can provide high-quality training and help embed DEI into organizations in a meaningful way.

My hope is that this book will serve as a road map for those who are interested in becoming DEI practitioners, as well as those who are charged with integrating DEI principles into organizational training programs, to provide education that cuts through the noise and gives people space for honest dialogue.
Chapter 1

Overview of the DEI Landscape

As the daughter of educators, I felt like I was receiving a lesson in every moment spent with my parents. If I asked my mother for help with an essay, she pulled out a dictionary, a thesaurus, and a red ballpoint pen. Hours later, my essay would be covered in red lines with suggestions for better word choices in the margins. There would be several rounds of edits before she was satisfied with the final product. If I had to study for a history exam or write a paper on a particular historical event, my father would settle into his green wingback chair, adjust his glasses, and begin, “Well, to understand the Korean War we really need to go back a few hundred years to understand Chinese–Korean relations . . .” I would emerge with pages of notes and a dazed look on my face after a marathon history lesson from my dad, wondering how I was going to fit all the stories he wove together into a consolidated report. As a kid, I found these home lessons tedious, and sometimes wished I had never opened my mouth to ask for help. I just wanted to do the assignment as quickly as possible and go back to watching TV.

But from those evenings of study with my parents I learned two overarching lessons that have forged my path and purpose in life.

From my English-teacher mother, I learned the power of words. They can be used to inspire, illuminate, and elevate. They can be used
to inflict pain, dismiss, and destroy. They can incite movements of compassion or hate. They can promote intellectual and emotional growth or regression. Words can bring forth laughter, tears, love, fear, rage, or diffidence. They can raise us up or shut us down. The absence of words when we stay silent can also be powerful, especially when the power of our words is needed to support others who have been silenced. Words are to be chosen with great care and intention.

From my history-teacher father, I learned the power of stories—the stories we hear and the stories we tell one another—and the power held by those whose stories are most often told. Our past serves as a window into the future. The further back we go and the more we explore human history, the clearer the patterns of our civilization become. To make sense of the present and to envision the future, we must delve into the past and explore history from multiple perspectives, especially from those who have been silenced or marginalized. The adage “History is often told by the winners” clouds our collective understanding of the past and does not accurately reflect the experiences of those who have been oppressed or victimized. Who writes the history books and whose stories do they choose to tell? How might we perpetuate lies and oppression by passing along stories that are one-sided?

Diversity, equity, and inclusion work starts and ends with the self. We have to be willing and able to explore the multiple dimensions that come together to create our unique identities. We must explore how words, our own and those of others, can create positive or negative reactions. We have to be open to challenging others’ beliefs and be willing to have our own beliefs challenged.

DEI work requires an understanding of how history has shaped the way we experience the world. It requires a balance of strategy and storytelling.

How do you define diversity, equity, and inclusion?

This chapter sets the foundation for our study of DEI. First, we define the common terms of diversity, equity, and inclusion. We also introduce the newer concept of expansion, which is integral to progress in DEI work. We then cover a brief history of the evolution of DEI work,
examine the challenges to making DEI efforts “stick,” and outline key efforts to make DEI sustainable in our organizations. A worksheet at the end of the chapter can help prepare you to deliver DEI training.

**Defining Core Concepts**

**Diversity** encompasses all the dimensions of human identity that make us who we are. Diversity includes all characteristics that shape our identity “lenses”—our beliefs, values, worldviews, perceptions—which thus influence our communication, our behaviors, and ultimately our relationships with others.

Diversity includes characteristics like race, skin color, ethnicity, gender, national origin, sexual orientation, religion, physical or mental ability or disability, socioeconomic background, academic background, profession, family and relationship status, language, habits and activities, and personality traits.

There are dimensions of our identity, like race, gender, sexual orientation, or physical or mental disability, over which we may have little or no control, but which have a significant impact on how we are treated, how we live our lives, and how we perceive ourselves and others.

Other dimensions of our identity, like religion, geographic location, and socioeconomic status, which we may be born into, may change over the course of our lives.

Depending on the context, we may find certain dimensions of identity play a more prominent role in how we define ourselves, how we are perceived and treated, and how we engage with others. For example, we may be very aware of certain dimensions of our identity in the workplace that are not as much of a priority in our personal lives. We are often much more aware of specific dimensions of our identity when we are in the minority, or when we have less power or privilege because of that dimension of identity.

**Equity** promotes fairness by creating a level playing field for everyone. This means providing opportunities for people to advance in their careers, to receive fair compensation and credit for their work, and to provide input into decisions that impact them.
Imagine an oval racetrack. The outer lane is longer than the inner one. So the runners’ starting points are staggered to ensure fairness. By placing the runner in the outer lane a few paces ahead, we’re not giving them an unfair advantage; we’re evening the race. If we placed everyone at the same exact point on the starting line, the person on the inside track has a greater advantage because they have a shorter distance to run.

Equity works in a similar way. It’s not about giving unearned advantages to people. It’s actually recognizing that some people already have unearned advantages simply by being part of a group that has held power and privilege in our society. When we are intentional, we ensure that we provide opportunities for growth, training, mentoring, and career advancement for people who perhaps have not been given those opportunities.

Research shows that often men will apply for a new position even if they don’t have all of the existing qualifications, while women will not apply unless they have all those qualifications (Mohr 2014). As an example of equity, a leader may encourage a female colleague to apply for a position even if she doesn’t have all the qualifications and provide advice on how to handle questions in the interview process.

In another example, it may be more difficult for an employee of color who is in a lower-level role to see themselves as capable of making a career shift, while a White employee may feel more empowered to take that risk or ask for professional development opportunities to be eligible for a different role. Equity in this case would be to encourage and provide time and resources for an employee of color to develop the new skills needed to shift to a new area of expertise.

**Inclusion** is the practice of creating an environment where everyone feels equally valued and respected for their individuality. Inclusive environments ensure that every person is able to participate fully in organizational life, and has equal opportunities to leverage their talents, skills, and potential.

All human beings want to both feel a sense of belonging with the group and be recognized for their unique qualities and characteristics. The term *optimal distinctiveness*, coined in 1991 by the social
psychologist Marilynn Brewer, describes individuals striving to achieve the optimal balance between belonging and differentiation both within and across social groups. A core part of our human survival has been our reliance on group belonging.

In the context of the workplace, inclusion refers to practices, behaviors, and structures that promote a sense of belonging and interdependence of the collective and encourage divergent ideas, acknowledge unique skills and experiences, and value individual characteristics and identities.

Expansion is the practice of immersing oneself in the lived experiences of others, broadening one's social networks beyond the comfortable “us” group, and building community across the broad landscape of our differences.

I employ this term because of two trends I witnessed in my work:

• Often the individuals in positions of privilege and power have noble intentions but lack an understanding of the depth of work they need to do to truly enact change in their organizations and communities. A number of organizations’ diversity, equity, and inclusion efforts only scratch the surface of the deep-seated problems around inequity and exclusion, often because the people who most need to change their attitudes and behaviors have the least incentive to do so.

• Our society has increasingly become polarized due to a variety of factors—political, economic, cultural, technological—that play into our instinctual human need to entrench ourselves in our “us” group. If we are to make progress not only in DEI but in all the complex challenges we face as a human civilization, we need tools to override our biases, make ourselves emotionally vulnerable to those we have been conditioned to perceive as the “other,” and embrace new ways of thinking, communicating, and living with one another.

Expansion means seeking out new voices, divergent ways of thinking, and pushing oneself to challenge existing schemas. Expansion requires individuals, especially those in positions of privilege and power, to:
• Leave their comfort zone to immerse themselves in the experiences of those they perceive as “other.” Human nature often drives us to seek out or stay in the spaces that feel safe to us. When we encounter people whose beliefs or behaviors are foreign, confusing, or in conflict with our own, our instinctual reaction is often to distance ourselves. Expansion requires us to do the opposite, to engage fully and listen openly when we encounter opposite viewpoints. This does not mean we must sacrifice our core values or beliefs. It simply frees us to explore and thus better understand the reasons people may see the world differently.

• Shift power to the voices that are often silenced. Expansion goes beyond superficial acts of inclusion, where we not only welcome people to our space, we leave our comfort zone behind and venture into spaces that are unknown to us. Accepting or inviting people to our proverbial table has an inherent power dynamic buried within. There is an implicit message of giving permission for others who are not part of the norm or majority. Expansion shifts the power from those who already had a seat at the table and requires us to leave our seat and maybe even leave the table itself to make room for people who have not historically had a seat. When practicing expansion, we have to be willing to temporarily displace ourselves from what is known and feels safe. We have to be willing to explore and engage with people in their comfort zones, where they have power.

• Challenge existing schemas and blind spots. Expansion is about bringing deep curiosity and a willingness to question our own mental models. We are willing to examine the way we’ve always done things and question whom the current structure and culture serves and whom it does not.

• Co-create a new culture with shared purpose and power. Expansion provides the unique opportunity to co-create a culture that works for everyone. Rather than expecting assimilation from those who have been underrepresented or sidelined,
we explore how to design a new way of working together that incorporates divergent experiences, values, and needs, and seeks to create a more balanced power structure.

Diversity, equity, and inclusion are interconnected and interdependent (Figure 1-1). To enact long-term change, we need to explore these three concepts in a meaningful way. Expansion is the glue that binds them all together.

**DEI: A Historical Perspective**

Human history is rife with stories of inequality, oppression, and polarization. It is also rich with stories of compassion, intercultural communication, diplomacy, and social progress. Mark Twain purportedly said, “History doesn’t repeat itself, but it often rhymes.”

To more fully grasp the present-day context of DEI, it is important to have some knowledge of what prefaced the era in which we find ourselves. This is by no means a comprehensive history so much as a spotlight on the major themes that influenced how people viewed issues of diversity, equity, and inclusion during a particular period of time.

**Civil Rights and Social Justice (Righting Wrongs) (1950s–’60s)**

The 1950s and ’60s brought an awakening to the US about the daily injustices racial minorities, women, and members of the LGBTQIA+ community experienced across the country. This era, rife with civil unrest, violence, and assassinations, culminated in significant societal...
changes as well as policy changes. There were a number of inflection points that contributed to the civil rights movement. Following are just a few of those inflection points.

In just a little over a decade, there were landmark decisions by the Supreme Court to outlaw segregation, and federal laws were passed guaranteeing equal employment and upholding voting rights. There were peaceful protests of all sizes, including the Montgomery bus boycotts, the Greensboro lunch counter sit-ins, the Delano grape boycotts in California to fight the exploitation of farm workers, the March on Washington, and the “Bloody Sunday” march across the Edmund Pettus Bridge. There was the incomprehensible loss of life, including icons like Malcom X, Martin Luther King Jr., and Robert F. Kennedy, as well as allies like Viola Liuzzo and James Reeb. The Stonewall Uprising in New York in June 1969 was a galvanizing moment for LGBTQIA+ activism, in which members of the LGBTQIA+ community took to the streets and confronted law enforcement to fight against endless discrimination and human rights violations. Powerful images of children and young people illustrate the heroes and martyrs of this time, from the photos of a tiny, six-year-old Ruby Bridges being escorted by National Guard as part of school desegregation, to the graphic images of young, peaceful protestors being attacked by law enforcement with fire hoses and dogs, to the unforgettable image of 14-year-old Emmett Till, whose mother insisted on an open casket after her son was violently murdered by two White men in Mississippi.

This was a time of reckoning, of fury, hope, violence, and social change.

**DEI Training Implications**

The impact of this period on our history as it relates to DEI is immeasurable. Although many Americans are familiar to a certain degree with the titans of the movement like Martin Luther King Jr, Rosa Parks, Malcolm X, and John Lewis, there are innumerable stories that are not taught universally in American classrooms and not discussed in American families. To truly comprehend the vast, systemic oppression and terror that has been the lived experience of Black citizens in the US, we must revisit this part of our country’s history with open eyes and hearts.
It is also critical to acknowledge that these movements were successful in enacting systemic change because they united people from diverse backgrounds in a common cause. The ability to engage in coalition building not only within each “us” community, but between communities of different racial, ethnic, religious, and socioeconomic backgrounds, was instrumental in creating the groundswell needed to disrupt systems of oppression and inequality.

The advent of what we now know as DEI-related training really took off in this era. However, it mainly focused on compliance with Title VII of the Civil Rights Act of 1964, prohibiting discrimination of employees based on sex, color, race, national origin, or religion. The remedy for organizations accused of discrimination or harassment was court-mandated compliance training for all employees.

**Implementing Social Change (Filling the Gaps) (1970s–’80s)**

The Civil Rights movement of the 1960s led to sweeping policy changes and a broader societal recognition of the discrimination and violence against people of color, members of the LGBTQIA+ community, and women. However, organizations and institutions struggled to uphold the new policies, and to create more diverse and equitable systems through affirmative action policies, including race and gender quotas.

There rose a backlash, mainly from Whites and males, who feared they were going to become the victims of “reverse discrimination,” a term used to argue that any policies or practices that gave special preference or opportunities to right the wrongs of the past led to discrimination against members of the dominant or majority group. In 1978, the Supreme Court’s ruling on *Regents of University of California v. Bakke* determined that the university’s racial quotas were unconstitutional, but that a school’s use of affirmative action to accept more minority applicants was permissible.

This era also saw an increase in women entering the workforce and a heightened focus on gender parity, anti-harassment policies, and pay equity. The Equal Employment Opportunity Commission (EEOC) received more than 50,000 complaints of sex-based discrimination in its first
five years of operation. Title IX of the Education Amendments of 1972 ensured equal access for women to higher education and professional schools, which increased the number of women enrolling in historically male-dominated professions like medicine, law, and engineering. The number of girls and women participating in athletics increased exponentially due to Title IX as well. The Equal Rights Amendment to ensure equality for all sexes was finally passed by Congress in 1972 (50 years after it was introduced) and sent to states for ratification; however, to date, it still lacks the ratification by three-quarters of states that is required for the amendment to be added to the US Constitution.

Disability rights activists also celebrated progress during this time, as they lobbied Congress and marched on Washington to demand civil rights. The Rehabilitation Act of 1973 mandated equal opportunities for employment in the federal government for people with mental and physical disabilities. The act also established a governing body to ensure compliance with laws requiring equal access to public services for people with disabilities. The 1975 Education for All Handicapped Children Act guaranteed equal access to education for children with disabilities. In 1990, after decades of advocacy, disability rights activists were successful in getting Congress to pass the Americans With Disabilities Act (ADA), which guaranteed equal treatment and access to employment opportunities and public accommodations.

This era saw a global rise in advocacy for LGBTQIA+ rights, with the first out gay minister ordained by the United Church of Christ in 1972. The 1980s brought the HIV/AIDS epidemic, which took a horrendous toll on the gay male population. During this time, there were both societal and political efforts to demonize the LGBTQIA+ community as well as an outpouring of public advocacy supporting LGBTQIA+ rights.

**Training and Development Implications**

DEI training during this time continued to focus mainly on compliance with EEOC regulations. There was some effort by organizations to focus on teaching beyond compliance “dos and don’ts,” yet many of the
training efforts fell short of motivating people to change attitudes and behaviors or to value diversity. There was not yet a focus on changing organizational culture to be a workplace that was inclusive and inviting for a diverse employee population.

Often, affirmative action debates may arise in a DEI training conversation. Trainers should know the history and evolution of affirmative action policies to a certain degree in order to manage such debates effectively. A few talking points to consider regarding affirmative action:

- The origins of affirmative action stem from the Civil Rights movement and can be traced back to John F. Kennedy’s 1961 executive order on equal rights for all races. Thus, affirmative action at its core is intended to right the injustices of the past that have held back racial minorities (mainly Black Americans) and women. Ironically, research shows that White women have benefited the most from affirmative action policies but have also become some of the fiercest opponents of affirmative action policies (Crenshaw 2006).

- Over the years, the courts have defined affirmative action more clearly, ruling quotas unconstitutional but not the use of affirmative action practices to strengthen diversity of marginalized populations. There continues to be some controversy surrounding who “wins or loses” with affirmative action policies.

- Forcing quotas is not necessarily the best solution to diversifying the workforce. On the other hand, research indicates that organizations that make no intentional efforts to diversify their workforce end up with homogenous teams, especially at the executive leadership and board levels (Dixon-Fyle et al. 2020). Bias continues to drive decisions that leave qualified women and racial and ethnic minorities out of senior positions.

- Organizations that are committed to DEI engage in policies and practices to mitigate bias in recruiting, hiring, and promotions. They take active and visible actions to hire and promote diverse teams at every level.
Managing Diversity (Making It Work) (1990s–early 2000s)

The 1990s and early 2000s saw a continued upswing in diversity due to a combination of factors. EEOC and ADA policies had become a fixed norm within organizational life. Two-income households became more universal as both men and women entered and stayed in the workforce. The demographics of the US population were increasingly diverse, racially and ethnically. Our economy was more globally interdependent than ever, and organizations increasingly were doing business with overseas employees, clients, and vendors.

More organizations began to acknowledge the importance of valuing diversity and the peril of ignoring it. Offices devoted to EEO and civil rights had been the center point of DEI efforts, but some forward-thinking organizations began to hire chief diversity officers and build systems for training employees across the organization on working in diverse teams.

Although the focus started to shift beyond mere compliance of laws and policies, there was still more of a superficial approach. Many traditionally marginalized employees (people of color, women, people with disabilities, LGBTQIA+, and so on) were still expected to assimilate to the dominant cultural norms, which were traditionally built around a history of White cisgender males being in power.

Training and educational programs emerged that focused conversations on specific identity dimensions that were historically marginalized. Simultaneously, there was a rising trend in diversity training during this time that broadened the conversation to encompass all identity characteristics and not solely focus on race, gender, and the EEOC-protected classes. Some practitioners argued that this “watered down” the conversation and made it overly comfortable for those with the most power and privilege. Others argued for the broadening of the conversation, saying it was valuable in changing attitudes toward diversity and undoing the damage of the “blame and shame” approach that had turned off many White people and men in past diversity efforts.

We also saw some practitioners begin to use terms like “multiculturalism” and “cultural competence” to define the skills needed to manage diverse teams and organizations. The intent of these terms was to
illustrate that everyone brings a set of cultural lenses and norms that dictate how they see the world and how they behave. It reinforced an approach that celebrated diversity as an asset and pushed the business case for diversity in terms of managing across diverse cultural norms and patterns of communication.

Although this approach helped to bring about more openness to exploring diversity and helped lessen the defensiveness of those in the dominant groups, some practitioners argued that it missed the mark in disrupting racism, sexism, and homophobia at their core and pushing people to talk openly about power and societal privilege, and thus it stopped short of ensuring accountability for upholding workplace cultures that were equitable and inclusive.

Training and Development Implications

Many participants in today's DEI training are likely to still see it through the lens of managing diversity. There is often a push by organizational leaders to spend time focusing on the business case for diversity and broadening the conversation to encapsulate diversity in all its forms, including diversity of thought.

Although it can be helpful to provide a research-backed rationale for why DEI is a strategic imperative, trainers should beware of overly focusing on the business case. People who have historically been marginalized are fatigued by having to state (or hear others state) why their voices and experience should hold equal weight to that of the dominant population.

Similarly, it is important to use a broad definition of diversity that encapsulates all the dimensions that make us who we are. This approach is valuable in that it:

• Creates an opportunity for every participant to feel they are a part of the conversation on diversity
• Breaks down the single-story stereotypes that narrow people's views of one another to one or two dimensions of identity
• Highlights the importance of exploring intersectionality and how multiple dimensions of identity can compound one's advantages or disadvantages
It is equally important to articulate when using a broad definition of diversity that the intent is not to dilute or distract from some of the dimensions that people find it more difficult to engage with, which in the US tend to be primarily race and ethnicity, gender and gender identity, and sexual orientation.

**Diversity and Inclusion (Changing Behaviors) (2000s–mid 2010s)**

In the early 21st century, diversity and inclusion work became more of a legitimate part of organizational strategy. During this time, there was an increase in the number of chief diversity officers and D&I departments, increasingly standing alone from HR functions. As more research showed the benefits of diversity in organizations, and as demographics in the US continued to diversify in terms of race and ethnicity, leaders began to take notice that the incoming workforce and the future pool of talent was not only more diverse but had a different set of expectations of what the workplace should be like and how divergent voices should be valued.

The rising popularity of research and books focusing on corporate culture change and leadership increased knowledge and appreciation of concepts like emotional intelligence and empathy. Research on neuropsychology, unconscious bias, and implicit associations began to show up in diversity training and provided people with new insights into how our brains are hardwired for prejudice and automatic judgment. Research on micro-expressions and micro-messages also invited people to think about diversity and inclusion not just in terms of preventing blatant acts of discrimination and harassment, but to acknowledge the small, subtle, daily indignities that many marginalized populations experience.

This era of training also solidified the interdependence of diversity and inclusion, as leaders in the field increasingly made the case for focusing not just on representation of diversity in organizations but on practices and policies that lead to a culture of inclusion. Training increasingly focused on providing people with skills to check their assumptions and
behaviors, and to be intentional about valuing diverse voices and communicating with heightened sensitivity.

Global diversity and intercultural competence training continued to gain in popularity and practice during this time, as more companies expanded multinationally and outsourcing to overseas employees became more prominent.

During this time, many organizations began to integrate diversity and inclusion concepts within overall initiatives focusing on employee engagement, wellness, and belonging. There are pros and cons to this approach. On the one hand, diversity and inclusion are crucial for building healthy, thriving organizations. On the other hand, diversity practitioners argued that this approach was an avoidance tactic to not address systemic barriers for historically marginalized people.

During President Barack Obama’s time in office, many leaders fell under the illusion that racism was no longer an issue that needed attention now that the US had elected its first Black and multiracial president. In 2013, the Supreme Court invalidated a key part of the Voting Rights Act of 1965, which then freed up states to change their election laws without federal approval. Chief Justice John Roberts wrote for the majority, “While any racial discrimination in voting is too much, Congress must ensure that the legislation it passes to remedy that problem speaks to current conditions” (Shelby County v. Holder 2013). Meanwhile, violence and disparate treatment against marginalized populations, especially Black people, continued. As graphic accounts and video evidence caught on smartphones spread on social media, the world was unable to ignore the injustices that continued. The stories of innocent citizens who were killed, many by police, including Trayvon Martin, Philando Castile, and Michael Brown, sparked the Black Lives Matter movement in 2013 to raise awareness of anti-Black violence and systemic racism.

The latter part of this period showed the juxtaposition between a desire to couch diversity and inclusion as a means to promote unity, wellness, and belonging alongside a burgeoning tide of frustration and anger at the injustice and inequity that continued to plague nondominant identity groups.
Training and Development Implications

The more pronounced focus during this time on inclusion and changing individual behaviors to build positive relationships was a shift toward fostering long-lasting culture change in organizations. More organizations built diversity and inclusion into their operations and hired professionals who specialized in it. D&I training became a regular offering in most organizations for managers and employees. D&I concepts also became core competencies in leadership and management training, and increasingly linked to performance evaluations for anyone in a supervisory or leadership position.

Concepts like unconscious bias, emotional intelligence, and micro-messages continue to be a prominent part of DEI training today.

Progress, Politics, and Polarization (Disrupting Systems of Oppression and Injustice) (Mid 2010s–the present)

The late 2010s through the early 2020s appear to be revisiting the cycle of civil unrest and systemic disruption that we saw in the 1960s during the civil rights movement. The BLM movement has continued to grow, followed by the #MeToo movement that gained widespread attention in 2017 in the midst of multiple reports of sexual harassment and assault against women.

The ever-increasing polarization that exists not only in US society but also around the world has been worsened by a rise in populism, a deepening economic division between the haves and have-nots, and social media that caters to our human instinct for gravitating toward those in our networks and confirming rather than challenging our biases. The increase in use of social networks and streaming services as sources of news and information has made it increasingly easier for people to be manipulated by information that is either skewed to reinforce their pre-existing beliefs or is straight-up propaganda.

The COVID-19 pandemic further illustrated the inequalities that exist for nondominant groups, including women; Black, indigenous, and people of color (BIPOC); and people of lower socioeconomic status.
The fight for LGBTQIA+ equality has experienced progress, with the Supreme Court legalizing same-sex marriage in 2015 and declaring it illegal to fire someone because they are gay or transgender. Representation of same-sex couples and LGBTQIA+ people in the media and entertainment industry has risen, but when examined from an intersectional lens, the representation is still overwhelmingly White (Nielsen 2020). Furthermore, progress has stalled and in some cases been thwarted, in particular for the gender nonbinary and trans communities. The largest mass shooting in US history was a hate crime against the LGBTQIA+ community, which occurred in 2016 at the Pulse nightclub in Orlando, Florida. 2020 was the most violent year on record for crimes against trans and nonbinary people, with 44 reported fatalities (HRC 2021). A number of state legislatures are considering laws to ban gender affirming treatment for minors.

Although there has been significant progress toward inclusion for LGBTQIA+ employees in the workplace, the percentage of LGBTQIA+ employees who say they are closeted at work has only decreased slightly in the last decade, from 50 to 46 percent. More than half of LGBTQIA+ workers report hearing jokes about gay and lesbian people, and the top reason most LGBTQIA+ workers decide not to report such behaviors is because they don’t believe anything would be done about it (HRC 2018). Additionally, supportive legislation and corporate policies have been put into place regarding parental leave, but these policies largely are built around a heteronormative focus on parenthood that excludes same sex male couples.

The cumulative result of these steps forward and back in terms of representation and fair treatment has been a heightened focus on disrupting systems of inequity and oppression. Increasingly, leaders and practitioners are adding the “E” (equity) to the “D” and “I” to symbolize an equal focus on ensuring fairness and equity for all. In fact, many are putting the “E” first in the acronym (EDI) to emphasize its importance. The language and focal point of a lot of diversity-related work have shifted toward challenging those with power and privilege to reflect and take action to right the wrongs of the past. In many ways, it feels like
a resurgence of the 1960s civil rights era. There has been an influx of interest and urgency to engage in efforts to drive change for diversity.

Training and Development Implications
DEI training has received a renewed focus and demand, but this time many organizations are being pushed by their employees and even consumers and other outside stakeholders to go deeper than past training efforts, which may be perceived as too generic or superficial. Training is more likely to prioritize equity along with inclusion and belonging. Organizations are providing training that more explicitly focuses on issues of race, power, and privilege.

The value of these more frank conversations and learning experiences is that people with status and power are now examining societal and organizational systems of exclusion and oppression and taking action to disrupt them. The challenge is the inevitable backlash that comes with systemic disruption that causes some to react with anger, defensiveness, guilt, or shame.

Also, the increased attention and demand has led to many people who lack the proper training and experience to conduct such training being asked (or volunteering) to do DEI training. Conducting DEI training without experience is not only a recipe for disaster for the individual trainer; it also delegitimizes those who have devoted their careers to this type of work.

In a subsequent chapter, we will discuss how to do your own work as a DEI trainer and the appropriate steps to consider before hanging your shingle out to do DEI training.

Philosophies Underpinning DEI
There are six distinct but interrelated philosophies that underpin DEI work (Figure 2-1):

- Social justice
- Business results
- Compliance
- Advocacy and allyship
• Valuing differences
• Oneness and unity

Each philosophy and subsequent approach will influence the way a DEI initiative is designed and its results. There is not necessarily a “right” or “wrong” philosophy. It’s important to consider how to include some elements of each of these concepts into the work. Yet, depending on the organizational culture and need, practitioners may find themselves leaning into some ideas more than others. Each approach also has a counterbalance. These are not necessarily opposing philosophies; rather, they can be considered centripetal, with DEI as the central body around which all six conceptual categories contribute energy.

It is important to consider how much we rely on each of these tentpole ideas so we don’t lose balance or momentum. Over-focusing on one or two may result in challenges, resistance, or setbacks.

Social Justice

“It’s time to right the wrongs of the past.”

Social justice is defined by the Oxford English Dictionary as “justice in terms of the distribution of wealth, opportunities, and privileges within a society.”

The United Nations (2006) defines it this way: “Social justice may be broadly understood as the fair and compassionate distribution of the fruits of economic growth.”

The social justice philosophy in terms of DEI work is strongly focused on equity. Social justice is centered around equal rights, equal access,
and equal treatment. It’s about acknowledging and working to right the wrongs of the past in terms of people who have been systematically marginalized, mistreated, or oppressed in society.

This philosophy is a powerful pillar for DEI work because it can move people to challenge and work to equalize the balance of power. It invites tough but necessary conversations around who in society has received unearned advantages and who has not. Without a focus on social justice, it can be challenging to overcome the deep, institutionalized barriers that have robbed so many people of the opportunities for success.

An underlying assumption in social justice philosophy is that people will recognize, understand, and agree with the notion that some populations have been historically (and continue to be) treated disparately. The social justice philosophy can also be challenging because it calls into question many people’s beliefs, biases, and narratives about their world, especially those who have received unearned advantages because of some aspect of their identity. This philosophy can also be hard for people who are part of nondominant identity groups. They may be exposed to conversations that retraumatize them. They also may experience blowback from individuals who are resistant to giving up power.

The social justice philosophy may work best in organizational or societal cultures that deeply value equality, civil rights, and community building and a focus on collective versus individualized needs.

**Business Results**

“DEI makes good business sense.”

The business results philosophy is about profit and productivity. It relies on research showing the financial gains of companies with more diversity at every level. The business results philosophy is backed up by years of research in organization development and behavior indicating that organizations with cultures that value DEI:

- Are more innovative
- Have more engaged employees
• Are able to hire and retain top talent
• Have teams capable of better complex problem solving
• Have higher financial performance
• Have fewer EEO complaints

This approach to DEI is the counterbalance to the social justice philosophy. An underlying assumption in the business results philosophy is that people will be not only intellectually but emotionally moved to action by the data showing the business case for DEI. The business results philosophy can be valuable in that it typically incites less active resistance or defensiveness because it’s not calling people to question anyone’s deeply held assumptions or beliefs, and it doesn’t explicitly prioritize any deeply personal work. This philosophy may work well in highly capitalistic and individualist cultures, where there is a strong need to win over those in power by focusing on bottom-line results.

However, therein lies the challenge. This philosophy alone doesn’t always yield true attitude and behavior change, and may result in superficial or short-term gains but a lack of sustainable culture change. For those who have been marginalized, oppressed, or abused because of their identity, this approach may feel hollow.

Compliance
“Follow the rules and we will have equity.”

The compliance philosophy focuses primarily on following regulations, policies, and practices related to fair and equitable treatment. The US Equal Employment Opportunity Commission (EEOC) enforces federal requirements for organizations in the US. Although these requirements differ depending on the organization’s size, sector, and other factors, most entities are prohibited in some way from engaging in discrimination on the basis of race, skin color, age, sex, religion, national origin, disability, or genetic information. Many organizations have additional rules and policies related to equal treatment that are enforced as well.

The compliance philosophy is valuable in that it provides a solid foundation of parameters that indicate what behaviors and practices are permitted and what is prohibited. Although there is often ambiguity
in interpreting the law and identifying discrimination and harassment, decades of legal precedent provide pretty clear guidance for employers and employees on how to act. An underlying assumption of the compliance philosophy is that such regulations will lead to positive and proactive attitudes and behaviors that foster DEI. However, a challenge with focusing only on compliance is that many will feel they’ve checked the DEI box as long as they learn and follow the rules. In so doing, there is little effort to engage in the necessary work of co-creating a workplace where everyone feels a deep sense of belonging. Leaders may resist engaging in proactive culture change based on the argument, “We have few complaints of discrimination or harassment, so what’s the problem?” Compliance alone does not yield a positive work environment for all; in fact it can sometimes have the opposite effect.

**Advocacy and Allyship**

“We each have to be a voice for others.”

The advocacy and allyship philosophy is the counterweight to compliance. It is all about taking a proactive approach and refusing to settle for compliance as the entire solution. The advocacy and allyship philosophy embraces the notion that every individual bears an obligation to be a vocal proponent of DEI and actively challenge and disrupt the existing structures that impede DEI progress.

This philosophy is centered on individuals in dominant and nondominant groups advocating not only for their own needs but being visible allies for others who may be treated disparately.

This philosophy is valuable in that it engages individuals to take a stand for others, so the burden is not solely on those who are marginalized to always have to advocate for their own needs. It requires people to be willing to acknowledge individual power, status, and privilege, and to practice courage and take interpersonal risks by challenging behaviors or decisions that are not conducive to DEI. This philosophy can be challenging for just that reason, in that it requires individuals to be willing to sacrifice their status or their relationships within their identity groups. It often falls upon the shoulders of a small
group of individuals to consistently be the standard bearers for DEI. It can be emotionally taxing to individuals and can create a drain on productivity, at least in the short term, as it does disrupt commonly held norms and practices that are deeply engrained in the organizational or societal culture.

**Valuing Differences**

“Our differences are what define us.”

The valuing differences philosophy is rooted in the notion that our differences make us stronger. It centers around exploring divergent experiences, perspectives, and beliefs. It celebrates and calls forth uniqueness. This philosophy prioritizes the multiple dimensions of identity that make each of us different from one another.

The valuing differences philosophy can be powerful in that it encompasses all the different characteristics of identity and makes space for everyone to feel that their unique stories, talents, and styles are important. The valuing differences philosophy invites “creative abrasion,” in which individuals are encouraged to challenge and debate one another (Hill et al. 2014). This philosophy works well in highly individualistic, innovative cultures.

The potential drawback to this philosophy is that it can overemphasize differences and uniqueness at the risk of ignoring the importance of building community or seeking harmony. It can also at times be so focused on individualized differences that it ignores or discounts the collective advantages or disadvantages that members of common identity groups experience. It can thus fail to challenge systemic barriers that impede opportunities for marginalized groups.

**Oneness and Unity**

“We’re all in this together.”

The oneness and unity philosophy is rooted in the notion that our common humanity binds us together. This philosophy focuses on emphasizing communal goals, highlighting basic human needs and behaviors over differences, and building harmony among individuals and groups.
This philosophy can be powerful in that it helps break down “us versus them” barriers and promotes a sense of interdependence.

The potential challenge with this philosophy is that it can minimize the important differences that define one’s identity, or ignore how different identity groups have been treated in our society. This is where we fall into the trap of saying, “I treat everyone the same,” “I don’t see color,” or, “If we just focus on what we have in common all the rest of our issues will disappear.” An overreliance on this philosophy can actually make it very challenging for those who are not having an equitable or inclusive experience to feel safe coming forward and expressing dissatisfaction. It can also lead to groupthink or a lack of divergent perspectives if the culture is overly prioritizing harmony and agreement.

**Why Do Some DEI Training or Organizational Change Efforts Fail?**

Although there is much research indicating the importance of DEI training and development work for organizational success, many have argued that there has been insufficient progress made in truly changing cultures and systems to be more diverse, equitable, and inclusive. In fact, there are plenty of instances where DEI efforts not only failed but led to resistance and backlash.

Why do we see so many organizations struggle to achieve or maintain successful efforts for DEI? Here are some challenges that often hamper DEI efforts.

**Over-focus on representation.** Some organizations focus only on getting more diversity in their workforce without paying attention to the environment that those employees will be entering. This leads to high levels of turnover and disengagement if the workplace culture is not inclusive or equitable.

**Focus on what’s easy and comfortable.** Leaders will often go for the low-hanging fruit with DEI efforts, which may include celebrations or social gatherings, or one-off training sessions on topics that don’t tackle the very real day-to-day challenges underrepresented groups face. In fact, a worldwide study of diversity efforts in organizations found that
75 percent of employees from underrepresented groups did not feel they had benefited from their organization’s diversity efforts (Krentz et al. 2019). The training is a way to check the box and doesn’t foster a sense of commitment to change behaviors.

**Conduct in conjunction with or by EEO compliance.** When DEI is relegated to either Human Resources or EEO compliance, it is often much more difficult to engage in sustainable culture change. Compliance with policies and regulations will not alone create a culture of DEI. In fact, a focus on compliance alone can often yield resistance to a more proactive approach to disrupting the status quo, and fostering creative, thriving, inclusive environments for all.

**Lack of accountability.** Successful DEI initiatives require everyone to fully embrace the importance of diversity. All who participate need to see the importance of managing their own biases in decision making and interactions. And there must be a process of accountability at the individual and systems level to ensure people are experiencing equity and inclusion.

**“Blame and shame” approach to training.** There is a delicate balance between having frank, tough conversations about issues of inequity and exclusion with the intent to raise awareness and pointing the finger at those who have unearned privilege as the perpetrators of oppression. If the training does not take a constructive approach that invites everyone to learn and grow together, it can quickly erode trust and a sense of ownership on the part of those who can be the biggest and most necessary allies in this work.

**Leaders avoid doing their own work.** Leaders often delegate to others but don’t participate actively or visibly in the initiative. Often I have found that senior leaders struggle to recognize that they need to do more than pay lip service to DEI. They must practice humility and an openness to learn, to engage in courageous conversations, and to apologize when they get it wrong. Leaders must set the tone and model inclusive and equitable practices for the DEI effort to stick.

**Maintain status quo.** DEI requires disrupting a system that has worked for those in positions of power, whether it’s formal or informal
power. Not only is it hard work to change the organizational culture, but it can be painful. Without realizing it, sometimes leaders of DEI efforts end up making a few small tweaks but largely leave the biggest barriers to DEI untouched.

**Performative allyship.** In the wake of recent violence and social unrest, there has been an increase in this kind of activity. Posting a statement or updating a website to say one is committed to diversity is not going to make true change happen. Also, if underrepresented groups see such statements but don’t see them backed up by actual change, they will lose trust in such organizations.

**Trainners don't do their own work.** Facilitating DEI training is not easy by any stretch. Even seasoned trainers and facilitators may be hijacked by their own emotional reactions. Many DEI efforts fail when trainers have not had the proper training to facilitate DEI dialogues. They either don’t know how to address the complex emotional issues that arise; they have not done deep enough research on key issues related to DEI from a historical, cultural, or psychological perspective; or they are emotionally triggered by something that occurs in the training environment and are no longer able to serve in a neutral capacity.

**Questions for Consideration**

- How does my organization define diversity, equity, and inclusion?
- What is my organization’s history in the context of DEI work?
- How long has the organization existed?
- What was the organization’s role or connection to different historical eras related to DEI?
- What, if any, “skeletons” do we need to pull out of our closet as an organization to give legitimacy to our DEI training?
- What DEI philosophies currently dominate our organizational conversations around DEI? What are the implications of that? What philosophies do we need to incorporate?
- What potential pitfalls do we need to avoid?
Summary

Diversity, equity, and inclusion are interconnected concepts, and expansion is the act of continuously exploring our learning edge. The goal of DEI work requires us to embrace the unique talents, experiences, and needs of different people, and to create workplaces that thrive because of their commitment to diversity, equity, and inclusion. To be effective, DEI training should be aligned with strategic organizational goals. It needs to create space for courageous conversations that acknowledge hard truths around systemic inequities and explore real issues that people face in their lives and at work. DEI training should be practical, continuous, and constructive. In chapter 2, we will explore how to assess the specific training needs of your organization to design a relevant and powerful learning experience.
# Worksheet 1-1. Introduction to DEI Training

Use this worksheet as a preparation for your DEI training. Consider the people or groups with whom you should collaborate on answering these questions, or with whom you should share this information. Revisit this worksheet regularly to gauge progress and recenter your DEI efforts.

<table>
<thead>
<tr>
<th>DEI Focus</th>
<th>What metrics are we focusing on (e.g., demographic representation, turnover rates, employee engagement scores, consumer satisfaction results)?</th>
</tr>
</thead>
</table>
| Reason for DEI Training | What is the explicit purpose of training (e.g., foster an inclusive environment and ensure everyone feels valued)?  
What is the implicit purpose of training (is this truly the intention or is it an attempt to appease marginalized groups or check the box)?  
Are the explicit and implicit reasons for training aligned? How will that affect the potential success of training? |
| Accountability | Who will be held accountable for applying the learning from this training?  
How will people be held accountable?  
How will leaders and people in positions of power be involved in the training (e.g., executive team, board, management)? |
| Philosophy | Which of the six philosophies are currently most prominent in your organization's discussions and approach to DEI training?  
- Social justice  
- Business results  
- Compliance  
- Advocacy and allyship  
- Valuing differences  
- Oneness and unity  
Which philosophy might you want to add to create balance? |
| Approach | What words or phrases do you hope people will use to describe the DEI training approach you are taking? (Avoid “blame and shame.”) |
| Trainers | Who is conducting the training?  
What are their qualifications?  
Are they the appropriate fit for this training? |
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