PORTLAND STATE UNIVERSITY

Executive Leadership Institute
Mark O. Hatfield School of Government
College of Urban and Public Affairs

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September 9, 2005

Joseph M. Quiñones
City of Portland
Bureau of Human Resources
1120 SW 5th Ave, Room 404
Portland, OR 97204

Re: BHR006 Request for Proposals:
       Development and Deliver of Culturally Competent
       Management Certificate Program

Dear Mr. Quiñones:

Please accept the attached proposal on the above referenced request for proposals from Portland State University. We have received the addendum on this proposal and incorporated that information into our proposal.

For program questions or to arrange a meeting please contact Dr. Masami Nishishiba at (503) 725-5151 or email her at nishism@pdx.edu. Contractual questions should be direct to my office and you can contact me at: (503) 725-3026.

Sincerely,

Margaret Marriot
Contracts Officer
Business Affairs Office

Culturally Competent Management Certificate Training Program Proposal

City of Portland
BHR006

Submitted by:
The Executive Leadership Institute
Mark O. Hatfield School of Government
Portland State University
PO Box 751 PA-ELI
Portland, Oregon 97207-0751

(503) 725-8261

September 9, 2005

3.b   Project Team

Our project team will consist of the following:
  o **Masami Nishishiba, Principal Consultant and Instructor**
  o **Trudy Cooper, Sub-Consultant and Instructor**
  o **Sharron Noone, Instructor**
  o **Staff support as needed from the Executive Leadership Institute**

Dr. Masami Nishishiba, Assistant Professor of Public Administration

As Principal consultant, Dr. Nishishiba will be responsible for client liaison, initial project definition and development with City staff, specifying and directing the work of the team, and presentation of program evaluation results. Dr. Nishishiba's time on this project during the project will be approximately 25% of her work, but as high as 40% in the development and Train the Trainer stages.

  Career highlights:
  o Received her Ph.D. in Public Administration and Policy from Portland State University, where she is currently Assistant Professor of Public Administration in the Mark O. Hatfield School of Government.
  o Developed the Multnomah County Cultural Competency Plan and methods to evaluate the county's diversity initiative. These efforts culminated as the basis for Dr. Nishishiba's dissertation.
  o She has taught courses on intercultural communication and research methodology, and has offered diversity trainings and intercultural communication workshops in the community.
  o Project manager for The Executive Leadership Institute's "Civic Capacity Initiative" funded by the U.S. Department of Education's Fund for Improving Post Secondary Education (FIPSE).
  o Program Director for the Japanese Municipal Officer's Mid-Career Training Program, Tokyo Foundation Grant – A project to design and deliver a curriculum on local governance history and methods for Japanese public employees visiting U.S. municipal and county governments. This program is described further in the capabilities section.
  o Heading up the Civic Capacity Assessment Project: The role of the Latino Network in Portland Metropolitan Community funded by Portland State University.
  o Coordinated the University Studies' Leadership for Change Cluster --- a general education curricula for sophomores and juniors at Portland State University.
  o Her research interests include issues of social diversity and civic capacity.
  o As a methodologist, her specialty includes Hierarchical Linear Modeling (HLM), Structural Equation Modeling (SEM), Multidimensional Scaling (MDS) and cluster analysis.
  o She is a trained Japanese-English conference interpreter. She has interpreted for President Jimmy Carter, Bill Gates (Microsoft), Phil Knight (Nike) and many others.

Trudy Cooper, Trudy Cooper and Associates, Organizational Consultant

Trudy Cooper will develop and deliver module four and assist in design and development of the overall program. She will spend 10% to 20% of her time on this project based on what stage the project is in.

  Career Highlights:
  o Interdisciplinary masters degree in organizational psychology, political science and community service and public affairs, University of Oregon.
  o Eleven years experience working as an internal trainer and consultant for the City of Portland bureaus of Environmental Services and Water, consulting for organizational change efforts in six

other bureaus, Mayor's and Commissioner's Offices as requested.

- o Six years experience as an external consultant for the City of Portland's labor-management efforts, involving joint strategic planning, team development and service/process improvements. These projects involved work with the Bureaus of Transportation, Planning, Office of Plan Development and Review, General Services, Office of Management and Finance, Human Resources, Parks, Police, Fire.
- o Seven years experience as an external consultant to City of Portland's bureaus, providing instruction and coaching in strategic planning, organization development, situational leadership, group development, communication and mediation skills, work process redesign, customer-supplier agreements, citizen/customer research, coaching and delegation, principals of labor-management collaboration, Myers-Briggs Type Instrument.
- o Instructor for the Professional Development Center of Portland State University, teaching strategic planning, conflict management and systems thinking for both certificate and on-site consultancy programs.
- o Consultant to city and county agencies, and private businesses in the Pacific Northwest since 1995, providing facilitation, instruction and coaching to managers, supervisors, professional/technical staff, and front-line employees.
- o Twenty years experience working in public sector organizations and with a wide variety of public sector labor organizations, including Police, Fire, Laborers, AFSCME, IBEW, Machinists, Operating Engineers, Painters, and SEIU.
- o Facilitated development of competitive tools for public service improvement, including the City of Portland's cost-comparison methodology for public-private bids.
- o Advised Mayor Tom Potter's staff on development of labor-management committees and other organization development issues associated with Potter's twenty recommendations to City bureaus.

Dr. Sharron Noone, Associate Professor of Public Administration
Dr. Sharron Noone will develop and deliver module three and assist in design and development of the overall program. She will spend 10% to 20% of her time on this project based on what stage the project is in.

- o Sharron has more than 25 years working and consulting in private, public and nonprofit organizations. She has a Master's Degree in Public Administration and a Doctorate in Workplace Education.
- o Her current areas of interest and teaching include public sector leadership, organizational culture (the Learning Organization), human resources, organizational behavior, and creating effective training situations.
- o She currently leads the development of all Public Safety programs for the Executive Leadership Institute, including mid-level and executive level training, distance education online and in video-conference, and coordination of a Public Safety Advisory Board.
- o In addition, Sharron delivers leadership components of the Leadership Development Programs for the U.S. Army Corps of Engineers, develops and delivers supervisory training online and in the classroom, and consults on customized training and interventions for public sector organizations of all kinds.
- o Special emphasis in designing new curricula with local government agencies in the state of Oregon. These new programs depend heavily on "co-production" where the client needs and academic expertise are brought together to meet the needs of the student-employees.

<u>**3.c   Capabilities**</u>

The Executive Leadership Institute offers a range of long-term programs specifically designed for public service managers, supervisors, and employees. These programs focus on developing the following essential leadership qualities:

- High commitment to public service as a sacred trust
- Innovative skills for organizational change
- Systems thinking and process improvement skills
- Capacity to reconcile competing political pressures
- Strong focus on relationship building and group development
- Ability to give meaning, direction and focus to the work.
- Ability to manage ambiguity, conflict and uncertainty
- Well-developed skills of reflective practice

First and foremost, ELI programs are <u>responsive</u> to client requirements and participant expectations. Second, the programs reflect a <u>continuity</u> of learning from one session to another. This continuity is accomplished through an integrated design and implementation process, actively facilitated by the program administrator. Finally, our programs all recognize that professional development involves the <u>learning of knowledge and skills at several levels</u>, including: individual (internal to a person); interpersonal (relationships among persons and work in a group or team setting); organizational (within units, within agencies, and in partnership with other organizations); and community (political positioning the organization external community). Above all, we recognize that the challenges which face public agencies today are unique to the public sector. We strive to serve the region's public agencies by bring the best practices, experiences and research to the table in every educational program.

The Executive Leadership Institute is a team of five full time faculty members and five staff. The majority of the projects are similar to this, and are managed with a professional staff of program coordinators who are responsible for budget and resource management. Along with the expertise in the faculty, the Institute creates project teams that are flexible, accountable and responsive to client's needs. At any time these members of the Institute can assist in this delivering this program. Additionally, as a unit with in Portland State University, we can drawn on the faculty of our department as well as many others to meet the needs of this program as they grow or change. In addition to these resources we are also proud to note that we adhere to strict accounting and cost principles as a public agency and always negotiate all costs up front. If necessary we are open to developing new agreements as clients' needs change or budgets are modified. As all state agencies are required to we are periodically audited by the Secretary of State to guarantee we adhere to generally accepted accounting practices.

Examples of Training Programs/Courses for Managers and Supervisors

The Executive Leadership Institute has a proud history of over two decades of training and research for public agencies in the Pacific Northwest. Originally founded with the Public Administration program at Lewis and Clark College, the Institute merged with Portland State University in 1996 with the creation of the Mark O. Hatfield School of Government. Within the School, the Institute serves as a resource to the public sector community in the region. The Institute fulfills its mission by providing leadership development, professional and educational programs, and applied research and services. Over the past decade we have been proud to facilitate everything from national discussions on forest management policy, training for Oregon public safety officers, leadership development for the Corps of Engineers, and educational opportunities for the public servants across the Northwest. Below is a sampling of the accomplishments of the Institute which we believe speak to our ability to meet the needs of the City of Portland:

Executive Master of Public Administration Program
This program offers mid-career professionals in public service the opportunity to develop and expand their skills as public servants and leaders. The Executive Master of Public Administration adapts the traditional master's program for the realities of working professionals. We have been proud to partner with the State of Oregon, Jefferson and Deschutes Counties to offer these programs to their employees. Two courses are of particular interest as they apply to this proposal:

> **Managing a Diverse Workforce (PA510)**
> Provides information and skill building to maximize the benefits of differences of all kinds in the workplace. In addition to traditional subject areas such as race and gender, diversity in areas such as thinking and learning are addressed.

> **Cross Cultural Leadership (PA510)**
> Leadership and leadership development are critical in all cultures, and some elements of effective leadership, such as setting objectives and adapting to changes are universal. Other aspects of leadership, such as communication strategy or effective recognition schemes are specific to ethnic or organizational cultures. This course defines both common and specific elements of leadership as well as investigating methods of leadership development.

Washington County Leadership Development
This program was developed specifically for Washington County's needs. The first goal is to provide participants with the knowledge, skills, and best practices to deal with key leadership challenges facing the organization in the foreseeable future. Second, the program identifies the unique features of Washington County and the implications these have for providing high quality public service to the citizens of the jurisdiction. And third, to develop a leadership model that is supported by current research that can serve as a training template for managers to transfer leadership knowledge and practices to those who will be stepping into leadership positions in the near future. This project was funded through a negotiated fixed price contract that did not require modifications once work started.

League of Oregon Cities
Development and delivery of 9 training topics to participants in the League of Oregon Cities, including; Personal Leadership Issues, Finding the Elements of your Personal Leadership Model, The Culture of the Organization, Leadership Issues in Diverse Workplaces, Inspiring and Motivating for a Shared Vision, Influence and Power: Getting Things Done Right, Building Partnerships and Alliances I & II, and Dealing with Change: External and Internal Issues.

Public Safety Training and Certification: Executive and Mid-Management Levels
The Executive Program provides those seeking command level public safety positions with the knowledge, skills and competencies to provide creative and effective organizational leadership. This program offers expert speakers who have dealt with the issues of strategic thinking and change.
The Mid-Management Development Program has two closely related goals. First, it is designed to build on participants' experience as they add to or improve management and leadership skills. Second, it provides critical information about organizational topics and trends in the public safety/public sector that impact an agency's ability to manage their organization and employees for high performance.

Japanese Municipal Officers Training Program
Through the support of the Tokyo Foundation and in cooperation with Waseda University in Japan, The Executive Leadership Institute is conducting a five-year training "Municipal Mid-Career Officers" program for local government officials from Japan. A group of 10-15 local government officials spend 4-6 weeks in Portland in the summer undertaking local government projects, learning project leadership and management skills embodied in a "Municipal Officers' Toolkit", and being introduced to "best practices" for local

government by Institute faculty. This program was administered through our Research Accounting office which guaranteed adherence state and federal cost control principles.

U.S. Army Corps of Engineers Leadership Development Programs:
Portland and Walla Walla Districts
These programs were developed closely with the leadership of both districts to meet the individual needs of their regions. The program is a year-long series of courses on leadership development, leading public organizations and national policy processes. All three courses were interwoven to show how each level comes to bear on the individual in their respective work. At each stage of the program Executive Leadership Institute faculty work with the Corps' leader to develop the appropriate and timely materials to best serve their emerging leaders. We are proud to say that the Portland District Leadership Development Program has been regularly recognized as on the best in the nation by the commanders in the Corps. These programs were contracted with a fixed price agreement and administered through our Research Accounting office which guaranteed adherence state and federal cost control principles.

Consulting Contracts
The Executive Leadership Institute has also contracted with the cities of Medford, Oregon, Vancouver, Washington and Kirkland, Washington to provide strategic planning, business planning and various consulting activities as needed.

Overall Program Design

We propose to deliver the train the trainer portion of the program in two twenty-student cohorts that will go through all of the modules. If there are less participants or it is more advantageous to have all of the train the trainers in one class, it is possible too. However we want to make sure the student to faculty ratio remains low to increase the level of learning and comprehension.

Once the train the trainer courses are completed the pilot program would begin. We would like to go through five full cohorts of 20-30 managers in this pilot program. Each cohort would be composed of the 20-30 managers, 3 trainers working as a team, and 5 observing trainers. The trainers would take turns in their roles in the program moving from trainer to observer. This would allow for self-reflection, observation of others and allow us to efficiently expose all trainers to teaching in the classroom as a practitioner and student. At the end of five full cohorts, the pilot program would train between 100-150 managers and give all 20-40 trainers time in front of the class as well as time observing others at work. Built into the pilot program would be debriefing and coaching by ELI faculty with the trainers.

1.) Orientation to Diversity Development and Cultural Competency

Course Summary

a. **Brief description of course**
This course focuses on developing a thorough understanding of the city's Diversity Development Plan and the definition and the theories of diversity and cultural competency. Particular emphasis is placed on developing a strong sense of commitment to diversity and cultural competency, through activities that explore the impact of various forms of biases on individuals and the organization. Participants will conduct a cultural competency self and work environment assessment, which will be used to guide the discussion on how each participant can improve their self and work environment cultural competency. This initial assessment will also be used as base-line information for the training evaluation.

b. **What materials will be used?**
  - Flip chart & Post It notes
  - Workbook
  - City's Diversity Development and Cultural Competency Plan

c. **What activities will be used?**
  - Brainstorming on definitions
  - Modified A-B Sharing
  - Discussion in pairs
  - Small group discussion for SWOT (Strength, Weaknesses, Opportunities, Threats) analysis.
  - Participant presentation on group discussion

d. **What handouts will be used?**
  - All handouts will be put together as a "workbook" for each module.
  - Example of the content for the workbook includes:
    - Agenda
    - Goals
    - Ground rules
    - Instruction and work sheet for exercise "What do you know about. . .?"
    - Instruction and work sheet for exercise "What do you mean by . . ?"
    - City's Diversity Development and Cultural Competency Plan
    - Instruction and work sheet for exercise "Tell me why!!"
    - Instruction and work sheet for exercise "Good news/bad news"
    - Instruction and work sheet for organizational cultural competency SWOT analysis

- o Worksheet for "Action Steps"
- o Evaluation form 1 "What I learned in this session"
- o Evaluation form 2 "What I like/dislike about this session"

Training Outline/Timeline

	Time	Activities *Training delivery/Objectives*
	5 minutes	Opening and Introduction *Trainers will greet and introduce themselves.*
	15minutes	Icebreaker exercise *Participants will have an opportunity to introduce themselves and establish a relaxing training atmosphere.*
	5 minutes	Go over agenda and goals *Trainers will go over agenda and goals.*
	10 minutes	Establish ground rules. *Trainers will go over the ground rules. Give participants opportunity to discuss and add more rules if necessary.*
	20 minutes	Exercise "What do you know about. . .?" *Participants will be asked to list what they know about the city's diversity development and cultural competency plan. Share as a group. Objective: To assess what they know about the City's plan.*
1h 10min	15 minutes	Exercise "What do you mean. . . ?" *Participants will be asked to write their definitions for the key terms. Objective: To assess their understanding of the terms.*
	20 minutes	City's Diversity Development and Cultural Competency Plan *The group will take a look at the plan, and compare it with what they listed under "what do you know about. . ." and their definition of the terms. Trainers will summarize the key points of the plan. Objective: To develop understanding of the City's plan.*
2 h	30 minutes	Exercise "Tell me why !!" *Participants will be asked to pair up. One person will be "A" and another person will be "B". Person A has to explain to person B "why" the city's Cultural Competency Plan is important. Person B has to ask back difficult questions. Switch partners. Debrief as a group. Objective: To develop the understanding of the importance of the City's plan.*
	15 minutes	Break
	25minutes	Exercise "Good news/Bad news" *Participants are asked to think about the many groups they belong to and decide on one that they would like to discuss. Participants will be in pairs and share some of the stereotypes and biases they have heard about the group they have selected. Debrief as a group. Objective: To develop awareness and impact of the various forms of biases.*
3h 20 min	40 minutes	Exercise: Organizational cultural competency SWOT analysis. *Organize into small groups. Each group will brainstorm on "Strength" Weaknesses" "Opportunities" and "Threats" of the city in terms of the Diversity development and cultural competency. Each group will present their analysis. Objective: Conduct organizational cultural competency assessment.*
	20 minutes	Action Steps *Participants will individually develop their action steps. Share with the group. Objective: To have specific action steps with the monitoring plan.*
	5 minutes	Summary and Wrap-up *Trainers will summarize the whole workshop.*
4 h	15 minutes	Evaluation *Participants will individually fill out the evaluation forms.*

Goals and Objectives

    a. **What are your goals for this training?**
        1) To have the participants understand the content and the significance of the city's Diversity Development and Cultural Competency Plan.
        2) To have the participants understand the definition of the key terms used in the city's Diversity Development and Cultural Competency Plan.
        3) To increase the awareness of various forms of biases and its impact on individuals and the organization.
        4) To develop a sense of commitment and specific action steps for improving personal and organizational cultural competency.
    b. **What are the expected objectives?**
        1) Participants will be able to explain the content and significance of the city's Diversity Development and Cultural Competency Plan with confidence.
        2) Participants will be able to articulate the definitions of the key terms used in the city's Diversity Development and Cultural Competency Plan.
        3) Participants will be able to identify various forms of biases and its impact on individuals and the organization.
        4) Participants will have specific action steps for improving personal and organizational cultural competency with plans to monitor its progress.

Selling Points

    a. **What makes your class interesting and/or memorable?**
        o This course incorporates a variety of activities to make the learning more interesting and memorable to participants.
    b. **What makes your class effective?**
        o This course is designed to help the participants internalize the city's Diversity Development and Cultural Competency Plan most effectively through hands on activities.
    c. **What makes your class unique?**
        o This course introduces general concepts and theories on diversity and cultural competency yet focuses specifically on the city's Diversity Development and Cultural Competency Plan.
        o The course is designed to have enough flexibility to be adapted to a variety of group sizes.
        o Cultural Competency self and organizational assessment is embedded in the activities. In this way, the participants would learn something about themselves and the organization. The assessment by the participants will also be used as a base-line information for the training evaluation.

Training Evaluations

    a. **Include a plan for determining the effectiveness of the training.**
        The effectiveness of the training will be examined by comparing the participants' entry for the "What do you know about. . . ?" exercise and "What do you mean by . . ." exercise to their evaluation form 1 "What I learned in this session. If the participant's entry in evaluation form 1 indicates a better understanding of the city's Diversity Development and Cultural Competency Plan, it suggests that the training is effective.
    b. **How will you evaluate whether the objectives have been met?**
        o Objective 1) -3) will be evaluated by examining the entry of the evaluation form 1.
        o Objective 4) will be met by all participants developing an action plan during the training.
    c. **How will you include both a formative evaluation and a final evaluation?**
        Evaluation form 2 "What I like/dislike about this session" gives us information for necessary modifications of the training. A final evaluation will be a compilation of the information

from both evaluation form 1 and evaluation form 2. Longitudinal follow-up of the organizational competency SWOT analysis will give us the overall impact of the training on the organization.

d.   How will evaluation activities and adjustments be carried out?

Evaluation activities are embedded in the training activities. The trainers will be able to compile the information at the end of each training session and make adjustments as deemed necessary.

2.) Creating a Multicultural Workforce

Course Summary
    a. **Brief description of course.**
        This course focuses on methods of recruiting, hiring and outreach of a diverse and multicultural workforce. Particular emphasis is placed on. Particular emphasis is placed on specific techniques for targeted recruitment through multiple modes of outreach. Through role plays and case scenario analysis participants will gain a hands on experience developing diversity-centered position descriptions, conducting interviews and selecting multicultural interview panels.
    b. **What materials will be used?**
- Flip chart
- Post it notes
- Workbook

    c. **What activities will be used?**
- Group discussion
- Case analysis
- Organization analysis
- Revising position description
- Role play
- Fish bowl observation

    d. **What handouts will be used?**
- All handouts will be put together as a "workbook" for each module.
- Example of the content for the workbook includes:
  - Agenda
  - Goals
  - Ground rules
  - Instruction and work sheet for exercise "Who gets the job?"
  - Instruction and work sheet for organizational analysis.
  - Instruction and work sheet for "Redesigning position description"
  - Instruction and work sheet for job interview role play
  - Evaluation form 1 "What I learned in this session"
  - Evaluation form 2 "What I like/dislike about this session"

Training Outline/Timeline

	Time	Activities *Training delivery/Objectives*
	5 minutes	Opening and Introduction *Trainers will greet and introduce themselves.*
	15minutes	Icebreaker exercise : "What do you know about diversity-centered hiring?" *Participants will have an opportunity to introduce themselves and establish a relaxing training atmosphere. Entry to the "what do you know" question will serve as a baseline data for the evaluation.*
	5 minutes	Go over agenda and goals *Trainers will go over agenda and goals.*
	5 minutes	Establish ground rules. *Trainers will go over the ground rules. Give participants opportunity to discuss and add more rules if necessary.*
1h 10 min	40 minutes	Exercise "Who gets the job ?" *Participants will be asked to examine a case study and select one candidate in a small group. A spokesperson from each group will present who was chosen and why. Objective: To stimulate discussion about, assumptions, prejudice or values and the role each participants*

		play in the hiring process.
	40 minutes	Exercise Organizational analysis *Participants will be asked to analyze individually the types of diversity they have/lack in their unit. Identify what type of people they need to hire in order to make their unit more diversity friendly. They will then share their analysis in a small group, and then present the information to the whole class.* *Objective: To examine their units and identify the areas their individual units need to improve in terms of recruiting, hiring, and retention.*
2 h	10 minutes	Break
2 h	40 minutes	Exercise "Redesigning position description" *In a small group, participants will review a position description and revise it to be more diversity centered. They will also brainstorm where they would send the job advertisement to reach out to more diverse pool of applicants. Each group will share the job description, the thought went into it, and the ideas for outreach.* *Objective: To identify key issues in developing diversity-centered position description and practice developing position descriptions that are diversity centered. To have the participants start thinking about multiple ways for outreach.*
	40 minutes	Exercise Job interview role play 1 : Selecting interview panel Participants will discuss the criteria for the interview panel and select 5 members from the group to serve as an interview panel. Interview panel will take a short while to go over the interview question, while the rest of the participants will select 3 candidates from the group.
3h 30 min	50 minutes	Exercise Job interview role play 2: Interview / Fish bowl observation *The interview panel will interview the three candidates. The rest of the participants will observe the process (Fishbowl observation). After the interview process, the participants share the observation, their thoughts being an interviewer/interviewee, and discuss important qualities for culturally competent interviewers.*
	15 minutes	Summary and Wrap-up *Trainers will summarize the whole workshop.*
4 h	15 minutes	Evaluation *Participants will individually fill out the evaluation forms.*

Goals and Objectives

e. What are your goals for this training?

1) To have the participants understand the impact of different assumptions, biases, and values on the hiring decisions.

2) To have the participants critically examine the make up of their units and/or organizations and identify the areas that need to be improved in order to make them more diversity friendly in terms of recruiting, hiring, and retention.

3) To have the participants acquire knowledge and skills necessary to develop diversity-centered position descriptions.

4) To have the participants acquire knowledge and skills to select and also be culturally

f. What are the expected objectives?

1) Participants will be able to articulate their own assumptions, biases and values that may affect their decisions in hiring.

2) Participants will be able to analyze their units and organizations and identify the areas where they need improvement in order to make the unit and/or organization more diversity friendly.

3) Participants will be able to articulate the necessary components to develop diversity centered position description, and also will be able to develop diversity centered position descriptions.

4) Participants will be able to articulate the necessary qualifications for a culturally competent interviewer, and also be able to serve as an interviewer in a culturally competent manner.

Selling Points

g. What makes your class interesting and/or memorable?
- This course incorporates variety of activities to make the learning more interesting and memorable to variety of participants.

h. What makes your class effective?
- This course is designed to help the participants internalize the knowledge necessary to create multicultural workforce.
- This course offers opportunities for participants to practice skills that are necessary for mangers to create multicultural workforce.

i. What makes your class unique?
- This course promotes learning and skill development though hands-on activities.
- The course is designed to have enough flexibility to be adapted to a variety of group size.
- The organizational analysis conducted by the participants in this session can be used as a base-line information to assess the long term impact of the training on the make-up of the units.

Training Evaluation

a. Include a plan for determining the effectiveness of the training.

The effectiveness of the training will be examined by comparing the participants entry for the "What do you know about diversity-centered hiring" ice-breaker exercise to their evaluation form 1 "What I learned in this session. If the participants' entries in the evaluation form 1 indicate better understanding of the diversity-centered hiring process, it suggests that the training is effective.

b. How will you evaluate whether the objectives has been met?

- Objective 1) , 3) and 4) will be evaluated by examining the entry of the evaluation form 1.

- Objective 2) will be met by all participants conducting the analysis of their unit.

c. How will you include both a formative evaluation and a final evaluation?

Evaluation form 2 "What I like/dislike about this session" gives us information for necessary modifications of the training. A final evaluation will be a compilation of the information from both evaluation form 1 and evaluation form 2. Longitudinal follow-up of the organizational analysis will give us the overall impact of the training on the organization.

d. How will evaluation activities and adjustments be carried out?

Evaluation activities are embedded in the training activities. The trainers will be able to compile the information at the end of each training session and make adjustments as deemed necessary.

3.) Managing Diverse Workgroups

Course Summary
a. Brief description of the 12-hour course.
 This course focuses on identifying and practicing leadership, supervisory, and managerial information, skills and attitudes that enhance effectiveness and efficiency in diverse workgroups. Beginning with the concept of culture in demographic, organizational and learning terms, the group will identify key underlying values that operate in their own workplaces, and then determine ways to promote, enhance or change those cultural values to better fit a diverse workgroup. Both individual and organizational models of diversity competency are used to build action plans for issues such as coaching, conflict resolution, team building and group bias.
b. What materials will be used?
- Flip chart or white/black board
- Powerpoint & overhead projector and screen
c. What activities will be used?
- Individual assessments of culture, individual style differences and environment
- Class reflection and large group discussion
- Small group discussion and reporting of case study analysis
- Demonstrations or role plays of case studies in conflict resolution and confronting group bias
d. What handouts will be used?
- Examples of the content for the workbook includes:
  - Agenda
  - 'Create a dinner' exercise
  - 'What I have learned from the previous sessions' exercise
  - Kouznes/Posner leadership/managership handout
  - Powerpoint presentation on cultures
  - Organizational culture assessment (must be purchased for each participant)
  - Case study on merging organizations with different cultures
  - 'Equal employment and employee rights statutes' exercise
  - Individual diversity model
  - Powerpoint handout and case scenarios on Equal Employment laws
  - Conflict resolution assessment and role play sheets
  - 'Methods of persuasion' exercise
  - City of Portland harassment and discrimination procedures
  - Powerpoint handouts on harassment
  - Case scenarios on harassment
  - Group think video clip
  - Organizational diversity model
  - Powerpoint presentation on performance management
  - Do you need to 'teambuild' exercise
  - Case scenarios of group motivation issue
  - 'Leadership courage' exercise
  - Powerpoint on leadership - conclusion
  - Evaluation form 1 "What I learned in this session"
  - Evaluation form 2 "What I like/dislike about this session"

Copies of handouts provided are drafts – final copies will be formatted in a booklet.

Training Outline/Timeline

1st 4-hour block

Time	Activities *Training delivery/Objectives*
15 minutes	Opening exercise *Create a dinner exercise*
30 minutes	Introductions and review of module components *Trainers and participants will greet and introduce themselves.*
5 minutes	Go over agenda and goals *Trainers will go over agenda and goals.*
30 minutes	Review of cultural competency from first two modules; Additions to the essential elements list for managing a diverse workforce *Class reflection and large group discussion* *What I have learned from previous sessions exercise*
15 minutes	The role of leadership in creating and enhancing an inclusive work setting *Powerpoint on leadership* *Kouznes/Posner handout on leadership and managership*
15 minutes	Presentation and discussion of the concept of culture from demographic, organizational and learning perspectives *Powerpoint presentation/handout* *Class reflection and large group discussion*
15 minutes	Break
45 minutes	Organizational culture assessment *Culture assessment for preferred and current organizational culture*
25 minutes	Role of the manager/supervisor in changing organizational culture *Class reflection and large group discussion*
40 minutes	Merging/changing organizational culture exercise *Case study on merging organizations with different cultures*
5 minutes	Summary and Wrap-up *Trainers and attendees will list major points to be used in framing the rest of the workshop*
15 minutes	Evaluation *Participants will individually fill out the evaluation forms.*

2nd Four-hour Block

Time	Activities *Training delivery/Objectives*
15 minutes	Introductory activity *People covered by equal employment and employee rights statutes exercise.*
10 minutes	Introductions and review of module components *Trainers and participants will greet and introduce themselves.*
5 minutes	Go over agenda and goals *Trainers will go over agenda and goals.*
45 minutes	Your individual role as a manager/supervisor in improving diversity management; Introduction of the individual diversity module *Individual diversity model handout (Cox/Beale)*
30 minutes	Review of Equal Employment laws for the federal and state level *Powerpoint handout and case scenarios*
5 minutes	Uses of the model and the laws in dealing with individual diversity issues: conflict resolution, coaching, communication/persuasion, demonstrated individual bias
15 minutes	Break

45 minutes	Conflict resolution *Conflict resolution assessment and role play*
30 minutes	Communication/persuasion/coaching – methods of persuasion based on individual values. *Methods of persuasion handout and exercise*

30 minutes	Demonstrated individual bias: Discussion of City harassment and discrimination procedures
	    City of Portland harassment and discrimination procedures
	    Powerpoint handout
	    Case scenarios

20 minutes	Summary and Wrap-up
	    Trainers and attendees will list major points to be used in framing the rest of the workshop
	    Attendees will fill out & turn in at least one element of the individual diversity module

15 minutes	Evaluation *Participants will individually fill out the evaluation forms.*

3rd Four-hour block

Time	Activities *Training delivery/Objectives*
15 minutes	Introductory activity Short clip from 'Groupthink' video
10 minutes	Introductions and review of module components *Trainers and participants will greet and introduce themselves.*
5 minutes	Go over agenda and goals *Trainers will go over agenda and goals.*
10 minutes	Discussion of the 'Groupthink' video and the effect of having all people thinking alike
35 minutes	Your role as a manager/supervisor in fulfilling organizational diversity elements; Introduction of the organizational diversity model *Organizational diversity model (Cox/Beale)*
5 minutes	Uses of the model in meeting organizational objectives: performance management, retention and promotion, team-building and promoting inclusiveness, demonstrated group bias
45 minutes	Performance management systems – shared standards of performance and effective orientation – determining essential and shared outcomes *Powerpoint presentation; development of performance standard; orientation actions*
15 minutes	Break
15minutes	Retention and promotion – meeting the underlying long-term needs of people; developing shared understanding of fairness and promotability *Class reflection and large group discussion*

30 minutes	Team-building – determining the need for "team" rather than "group" and methods for overcoming differences in employee values
	    Do you need to teambuild exercise
	    Case scenarios of group motivation issues

30 minutes	Promoting inclusiveness and countering demonstrated group bias – the role of the manager/supervisor in demonstrating and confronting group bias.
	    Leadership courage exercise
	    Powerpoint on leadership - conclusion

5 minutes	Summary and Wrap-up
	    Trainers and attendees will list major points to be used in framing the rest of the workshop
	    Attendees will fill out to turn in at least one element of the organizational diversity module

15 minutes	Evaluation *Participants will individually fill out the evaluation forms.*

Goals and Objectives
   a. What are your goals for this training?
      1)   To have the participants understand how culture involves values, and how those values structure how well diverse groups fit within an organization.
      2)   To have the participants understand the culture and values currently present in their departments.
      3)   To have the participants understand their role in creating a culture and values that support inclusive practices while still maintaining productivity and efficiency.
      4)   To have the participants understand the systematic nature of performance management and how to use the steps in that process to lead and resolve problems within their own work groups.
   b. What are the expected objectives?
      5)   Participants will be able to list the values of their current and preferred cultures as well as ways to change cultures.
      6)   Participants will be able to articulate elements of an individual cultural competency program as well as specific actions that can be taken by each individual to enhance performance of employees in a department.
      7)   Participants will be able to list organizational efforts that foster inclusiveness as well as their role in supporting those efforts.
      8)   Participants will be able to integrate elements of cultural competency with performance management systems.

Selling Points
   a.   What makes your class interesting and/or memorable?
      •   Based on trainee evaluations and client input, the adult learning model, including participation, feedback, real-life case studies and exercises and instructor enthusiasm for the content and the audience have been major highlights.
   b.   What makes your class effective?
      •   Again, the adult learning model with practice and feedback allows the participant to bring the concepts to the personal experience level. With appropriate support from the workplace once the participant returns, there are many tools and concepts to "try out".
   c.   What makes your class unique?
      •   Discussion of supervision/managership/leadership across all sectors of the workplace with public sector concerns emphasized.
      •   The culture/values assessment tool creates a graphic as well as verbal representation of the differences in culture profiles which is both informative and the source of much discussion and humor based on interpretations.

Training Evaluation

   a. Include a plan for determining the effectiveness of the training.

   The effectiveness of the training will be examined by comparing the participants entry for the "What have you learned from previous sessions?" exercise, the answers to the merging cultures case study, and the hand-ins of the individual and organizational diversity plans to their evaluation form 1 "What I learned in this session" from each of the 4-hour sessions. If the participant's entry in the evaluation form 1 indicates increasing understanding of better tools for dealing with diversity issues at the individual or organizational level, it suggests that the training is effective.

   b. How will you evaluate whether the objectives has been met?

      •   Objective 1) -4) will be evaluated by examining the entries on the evaluation form 1 as well as hand-ins from specific exercises listed in "a" above.

c. How will you include both a formative evaluation and a final evaluation?

Evaluation form 2 "What I like/dislike about this session" gives us information for necessary modifications of the training. A final evaluation will be a compilation of the information from both evaluation form 1 and evaluation form 2, Longitudinal follow-up of the organizational diversity actions will give us the overall impact of the training on the organization.

d. How will evaluation activities and adjustments be carried out?

Evaluation activities are embedded in the training activities. The trainers will be able to compile the information at the end of each training session and make adjustments as deemed necessary.

4.) Creating and Maintaining an Inclusive Work Environment

Course Summary

a.   Brief description of course

This course focuses on understanding 4 basic approaches that organizations have taken to diversity work. Content compares and contrasts the principles, goals and drivers of Affirmative Action, diversity efforts, and multicultural initiatives. Of particular importance is the progression needed to create a foundation for deeper, sustainable progress. Activities explore the continuum of responses, from addressing individual prejudice to focusing on diversity as an organization development issue. Assessment exercises focus on the often invisible institutional practices that create exclusion.   Individuals will have the opportunity to explore the day-to-day practices that operate to support the norms of the "dominant" group, both in the workplace and dealing with citizens/customers/suppliers. Participants will discuss the unintended consequences of the "assimilative" approach, as well as the limitations of the "in diversity there is strength" approach. This course helps managers acquire tools for broadening organizational norms and improving organizational capacity. The goal is an organizational response that goes beyond simply valuing differences to actively engaging diverse norms for problem solving, communication, and leadership styles.

b.   What materials will be used?

- o   Flip charts
- o   PowerPoint
- o   Excerpts from publicly distributed articles (for future reference and resources). [1]
- o   Workbook of concepts, tools, and worksheets

c.   What activities will be used?
- o   Large group presentation and group discussion on the differences between affirmative action, some diversity approaches, and multiculturalism.
- o   Individual assessment of exclusivity in participant's organization.
- o   Work in pairs.
- o   Small group interaction, practice and discussion.

d.   What handouts will be used? (Please attach handout)
- o   Defining Affirmative Action, Diversity, and Multiculturalism
- o   Defining "Privilege" (Source: Paul Kivel)
- o   Assess your Bureau's Practices (Jackson-Holvino Model). [2]
- o   Why Friendly Co-Workers and Individual Action are not Enough
- o   Organizational Dynamics: (e.g. Predominant Norms, Majority Status, Economic Benefits, Individual Solutions, Assimilation and Tokenism).
- o   The Invisible Weightless Knapsack (Peggy McIntosh)
- o   Restraints to Talking about Exclusion
- o   How to Talk about Inclusion
- o   Next Steps on creating an inclusive, multicultural workplace

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[1] Tarso Luis Ramos, "Racing the Northwest: the Organizational Challenge in a Changing Region," The Arc, 2002; Paul Kivel, Uprooting Racism, New Society Publishers, 2002; B.W. Jackson and E. Holvino, "Developing Multicultural Organizations. The Journal of Religion and Applied Behavioral Sciences, 9(2), 14-19, 1988.

[2] B.W. Jackson and E. Holvino, "Developing Multicultural Organizations. The Journal of Religion and Applied Behavioral Sciences, 9(2), 14-19, 1988.

Training Outline/Timeline

Time		Objectives, Activities
	5 min	Introduction and brief history of "predominant norms" influencing inclusion
	15 min	Participant introductions *Participants will have an opportunity to identify themselves, their role, and their immediate workplace, and create a comfortable group atmosphere.*
	5 min	Agenda, goals, learning objectives and ground rules *Trainers will acknowledge the difficulties people commonly experience with this kind of discussion and describe means for making the training comfortable and constructive.*
	15 min	Exercise: "What we know about diversity related programs…" *In small groups, participants will discuss and record on chart paper their perceptions of the differences between Affirmative Action, Diversity, and multicultural competence.*
	10 min	Large Group: Discuss exercise. *Trainers will summarize the goals, approach and drivers of Affirmative Action, Diversity, and Multicultural Competence. Relate each to issues of assimilation, "valuing difference," and addressing implicit norms and distribution of influence / power in the workplace.*
1h 5min	15 min	Exercise in small groups—"Preferred Future" *Participants will envision a workplace climate and patterns of interaction and influence that are truly inclusive. Each group will record comments and be prepared to share 2 items from their list.*
	5 min.	Large Group Discussion—"Where are we Now?"*Trainers will record 2 items from each group. Trainers will ask participants "how far from this ideal is the City?"*
	25 min.	Exercise in pairs—"What will it take to move to this future?" *Trainers will ask participants to answer a set of reflective questions. E.g.—"How are we managing diversity now?" "How long has this management style been in place?" "To move things more toward the ideal, what will have to happen?" "What, if anything, have I done to move things in the direction of the ideal? What, if anything, have I done that maintains the current situation?"*
	10 min	Large Group Discussion *Trainers will ask for a few insights from the exercise. Trainers will expand upon concept of "predominant norms" and their relationship to issue of class and privilege. Trainers will introduce the Jackson-Holvino-Hardiman worksheets that model progressions of diversity development.*
2h	15 min	BREAK
	15 min.	Individual work & small group discussion—"Key features of Diversity Development" *Participants complete worksheets on diversity model and compare answers. Participants will decide which stage most closely resembles the City's overall diversity development. Participants prepare to share 2 items from their discussion with the large group.*
	5 min.	Large Group—"Norms, Status, and Influence" *Trainers record comments from the groups. Trainers briefly present analysis of the impacts of assimilation and tokenism in preserving predominant norms. (Objective #2)*
	25 min.	Small Groups—"Unpacking the Invisible Knapsack"[3] *Trainers will ask participants to consider the list of examples and brainstorm how they manifest in the workplace. Participants prepare to share 2 examples from their list.*
2h 55min	10	Large Group—"Unpacking the Invisible Knapsack" *Trainers ask for examples from the groups, and record them on chart paper. Trainers ask for responses from the group about how they see their roles in leading work groups to broaden their norms, thus expanding inclusiveness in moment-by-moment work.*
	25 min	Small Groups—"What helps / hinders talking about inclusiveness / Exclusivity?" *Trainers present a template of common barriers, and ask participants to fill in the details. Trainers present a template of common supports for new "crucial conversations" and ask participants to fill in the details.*
	25 min	Large Group—"Helps / Hinders" *Trainers summarize examples. Trainers present approaches for "power sharing." Trainers pose "appreciative inquiry" questions to ask for ideas on how to build on the strengths of subdominant groups. Summarize concept of moving toward positive capacity building rather than focusing on "problems" with differences.*
4h	15 min	Conclusion—"Next Steps" *Participants identify major points from the session. Trainers ask participants to summarize the benefits of moving diversity beyond programs and into the day to day approaches to problem solving, decision making, leadership. Participants complete "Next Steps" worksheet.*

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[3] Peggy McIntosh; Class Act

Goals and Objectives

Goals for this training
- o Improve understanding of the influence of "dominant norms."
- o Greater clarity of the manager's role in leading diversity development in day to day work.
- o Ability to assist subordinates in broadening norms to include subdominant values and styles.
- o Skills in setting up and facilitating structure and process to use the contributions of diverse individuals and groups.

At the end of the training session, participants will be able to do the following:
- o Define the key goals and differences between Affirmative Action, Diversity and Multiculturalism, and the relationship between them
- o Identify practices and behaviors that limit inclusiveness on a day to day basis.
- o Practice posing questions to lead work groups to broaden cultural norms for day to day planning, problem solving, and decision-making.
- o Explain the benefits to organization development and to the workplace community of working together to build genuine inclusiveness.

Selling Points

- o **What makes your class interesting and/or memorable?**
  Trainers employ the "Appreciative Inquiry" approach to build a community of ideas around the issues of privilege and multiculturalism. This approach does not stimulate defensive responses, thus making it easy for participants to discuss difficult issues openly.

- o **What makes your class effective?**
  Starting with the workplace, then moving to the interpersonal and the personal reduces tension. Participants are engaged as experts with respect to their own culture and class background, age, and gender experiences. This creates the basis for looking more closely at the dimensions of privilege that may affect people who are in a different status position in society. Simple approaches for "putting it into words" and developing norms for doing so create new confidence in participants who may have a tendency to avoid communication of this nature. The resources are excellent aids for participants when they return to the job.

- o **What makes your class unique?**
  Many diversity classes focus only on individual attitudes. This focus separates people, rather than bringing them together to support change. Instead, this class explores the subtler, systemic nature of privilege. Most classes also begin from a "problem" or "deficiency" perspective. This can generate a sense of blame. Instead, we employ the positive, building techniques of Dialog and Appreciative Inquiry. This reduces people's fears about engaging in labeling or stereotyping, but most importantly, it affirms that multiculturalism is a collective process.

Training Evaluation

Same evaluation plan as Module 1

3.e   Diversity in Employment and Contracting

This proposal is submitted by the State of Oregon by and through the State Board of Higher Education on behalf of Portland State University – Executive Leadership Institute/Hatfield School of Government, hereafter known as ELI. ELI and the University system are not eligible to be certified under the State's MBE, WBE or ESB programs. However, ELI will subcontract with Trudy Cooper and Associates, a WBE certified with the State of Oregon (#1410) and EEO certified with the City of Portland.

Analyzing the use of minorities and women in our workplace can be examined on several levels. First, on the university wide level where our office of Affirmative Action and our Business Office work to make sure our hiring and contracting processes overcome and avoid underutilization of minorities and women. Second, diversity can be studied at our departmental level and for this project in particular. By examining both of these areas it is clear the both the University and the Institute in its parent Department are working hard to meet the goals of our affirmative action and diversity initiatives.

Any discussion of diversity at Portland State University should start with the guiding principles given by the university's President Daniel O. Bernstine:

> As an urban university we are committed to enhancing the intellectual, social, cultural and economic capabilities of our constituents through educational, research and service programs that reflect and meet the interests of these diverse communities. The integration of teaching, learning, research and outreach carried out by students, faculty, and staff of diverse ages, ethnicities, genders and experiences provides an environment where those enhancements can take place.

> In light of this it is imperative that we conduct all of our activities in a lawful, non-discriminatory manner with respect to race, color, sex, religion, ethnicity, national origin, age, disability, veteran status, marital status, sexual orientation or any other applicable basis in law. It is equally important that we maintain a campus environment that recognizes, support and celebrates diversity.
> - President Bernstine, letter of September 18, 2002.

It is from these guiding words that the university develops and adheres to both affirmative action and diversity programs through its offices of Affirmative Action and Business Affairs.

The University's Affirmative Action plan is currently being revised as part of the university's regular self-reflection on how it utilizes minorities and women in its workforce. As a part of this process the university uses a series of test to study all job groups and areas in the university for the underutilization of minorities and women. In this examination the university found that women are underutilized in the Athletics and Performing Arts departments. The university's Affirmative Action office continuing practices are being used to meet these deficiencies. Additionally the office also works with departments in the hiring process to prevent slipping back into underutilization. The office supports hiring by providing community outreach and advertising services and at the same time requiring departments demonstrate their own efforts to connect with minority or women groups or communities.

In addition to these workforce-based practices, the university under the direction of President Bernstine also strives to offer contracts to minority, women or emerging small enterprises. This program is administered through the office of Business Affairs. Business Affairs provides all purchasers in departments the certified M/W/ESB database of vendors, and hosts vendor workshops to connect purchasers and vendors. Additionally the university often relies on M/W/ESB contracts for office supplies and other common services based on the State of Oregon contracts issued through such vendors as Boise or OfficeMax. This

effort also supports the requirement and funding from the various U.S. Environmental Protection Agency, (EPA) contracts that require portions of EPA dollars to go to M/W/ESB's.

On another scale, our department's hiring practices and the planning for this project have been done with the desire to meet our institution's diversity goals. In the recent reaccredidation of the department it was demonstrated that the department had moved great strides toward both gender and minority diversity. In fact meeting goals in the first instance and making improvements in the latter over the past several years. For this project, the Executive Leadership Institute consulted with Trudy Cooper and Associates (TCA), a women business enterprise certified with the State of Oregon. Additionally, the program lead on this project is one of our newest faculty members, Dr. Masami Nishishiba who is a woman of Japanese origin.

3.f   Proposed Cost

The proposal cost is based on the program design put forth in section 3.d of this proposal. We will be relying on the professional services of two members of the faculty in the Executive Leadership Institute and contracting 20% (twenty percent) of the work to Trudy Cooper and Associates, a woman owned enterprise. Rates for instructors are inclusive of all other staffing and administrative costs from the Executive Leadership Institute.

Professional Services	*Hours*	*Rate*	*Total*
Dr. Masami Nishishiba *Portland State University*	253	$150	$37,950
Dr. Sharron Noone *Portland State University*	146	$150	$21,900
Trudy Cooper and Associates *WBE Subcontractor*	106	$150	$15,900
Total Professional Services			**$75,750**

Supply Costs

Organizational Cultural Assessment Tool *200 assessments at $13.50/person from third party*	$2,700
Local travel costs (estimated)	$400
Instructional Materials	$650
Total Supply Costs	**$3,750**
Total Proposed Cost	**$79,500**

3.g   Supportive Information

The following references are based on a variety of services provided to agencies:

Public Safety Training and Certification: Executive and Mid-Management Levels
The Executive Program provides those seeking command level public safety positions with the knowledge, skills and competencies to provide creative and effective organizational leadership. This program offers expert speakers who have dealt with the issues of strategic thinking and change.
The Mid-Management Development Program has two closely related goals. First, it is designed to build on participants' experience as they add to or improve management and leadership skills. Second, it provides critical information about organizational topics and trends in the public safety/public sector that impact an agency's ability to manage their organization and employees for high performance. This program is ongoing.

The following references have evaluated the program for their employees participation and/or taken part in the program design and evaluation:

> Derrick Foxworth, Chief
> Portland Police Bureau
> 1111 S.W. 2nd Avenue,
> Portland, Oregon 97204
> (503) 823-0000

> Larry Kanzler, Chief
> Milwaukie Police Department
> 10722 SE Main Street
> Milwaukie, Oregon 97222
> (503) 786-7405

U.S. Army Corps of Engineers Leadership Development Programs:
Portland and Walla Walla Districts
These programs were developed closely with the leadership of both districts to meet the individual needs of their regions. The program is a year-long series of courses on leadership development, leading public organizations and national policy processes. All three courses were interwoven to show how each level comes to bear on the individual in their respective work. At each stage of the program Executive Leadership Institute faculty work with the Corps' leader to develop the appropriate and timely materials to best serve their emerging leaders. We are proud to say that the Portland District Leadership Development Program has been regularly recognized as on the best in the nation by the commanders in the Corps. These programs were contracted with a fixed price agreement and administered through our Research Accounting office which guaranteed adherence state and federal cost control principles. The Portland District program is ongoing and the Walla Walla program ran for five years until 2002.

> Davis Moriuchi, Deputy District Engineer, Portland District
> U.S. Army Corps of Engineers
> 333 SW 1st Avene
> Portland, OR 97202
> 503-808-4503 (Executive Office number)
> Mr. Moriuchi works with the faculty of ELI to design the program and evaluates our performance each year.

> Sharon White, Program Contact
> Walla Walla District
> U.S. Army Corps of Engineers

201 North Third Avenue
Walla Walla, WA 99362
(509) 527-7701
Sharon.L.White@nww01.usace.army.mil
Ms. White administered the program on the agency's behalf with ELI, the program at this time is not running.

CITY OF PORTLAND
PTE FIRST TIER SUBCONSULTANT DISCLOSURE FORM
(FORM 1)

This Request for Proposal requires submission by the proposer of the First Tier Subconsultant Disclosure Form.
When the contract amount of a first-tier subconsultant furnishing services, labor or labor and materials would be greater than or equal to $10,000, the proposer must disclose the following information about that subconsultant.

Proposer Name: Portland State University **Total Amount:** $79,500

RFP Number: BHR 006   **Project Name:** Cultural Competent Management Certificate Training Program

SUBCONSULTANT NAME (Please Print)	M/W/ESB	SCOPE/TYPE OF WORK	SUBCONTRACT AMOUNT
Trudy Cooper & Associates	WB	Instruction and Consulting	$15,900
			$
			$
			$
			$
			$
			$
			$

If the proposer will not be using any subconsultants that are subject to the above disclosure requirements, the proposer is required to indicate "NONE" on this form.

Orientation to Diversity and Cultural Competency

Created by
The Executive Leadership Institute

Agenda

Time	Activities
25 minutes	Opening Activities and Introduction
10 minutes	Ground rules.
20 minutes	What do you know about. . .?"
15 minutes	"What do you mean. . . ?"
20 minutes	City's Diversity Development and Cultural Competency Plan
30 minutes	"Tell me why !!"
15 minutes	Break
25minutes	"Good news/Bad news"
40 minutes	Organizational cultural competency SWOT analysis.
20 minutes	Action Steps
5 minutes	Summary and Wrap-up
15 minutes	Evaluation

Goals

1. To have the participants understand the content and the significance of the city's Diversity Development and Cultural Competency Plan.

2. To have the participants understand the definition of the key terms used in the city's Diversity Development and Cultural Competency Plan.

3. To increase the awareness of various forms of biases and its impact on individuals and the organization.

4. To develop a sense of commitment and specific action steps for improving personal and organizational cultural competency.

Ground rules

In order to support a safe and productive environment for discussing the issues on diversity and cultural competency, we recommend the following ground rules to be adopted today.

Confidentiality:

During and after the program, feel free to share your session experience with others. But do not ascribe comments to individuals.

Disguise Examples:

During the session, do not use the names of specific individuals in your examples or discussions.

Withhold Judgment:

The purpose of discussing issues is not to reach consensus, but to share views and listen to those of others. Reserve making quick judgments on others. Reflect on your thoughts.

Share "Airtime"

When many people talk at once or the same person speaks most of the time, we miss the benefit of hearing the views of all participants. Do not dominate the discussion. Be mindful to those who haven't shared their ideas.

Take Responsibility:

Own your opinions. Start your comments with phrases like "I feel. . ."or "I think. . . " as oppose to "they said. . ." or "everyone knows . . . "

Active Participation

Willingness to participate in the activities will enhance your personal learning. You don't have to be "politically correct." Share your ideas.

Do not be a "Negaholic"

Try to think in positive manner.

Have Fun!!

Learning is enhanced when people are having fun.

Think about other ground rules that may be important to the group. Add them here:

_____

_____

_____

_____

_____

_____

_____

_____

"What do you know about. . . ?"

In the next 3 minutes, without looking up anything, please write down, anything you know about what the City is doing for Diversity and Cultural Competency.

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

"What do you mean by. . . ?"

Diversity and the terms generally used in discussion of diversity and cultural competency may mean different things to each individual. It will help in our discussions if we can discuss the meaning of these terms, and the feelings these words may evoke for each of us. First, take a little bit of time and jot down what you think each of these following terms mean. Get together as a group, and share the definition of the terms you come up with. Try to come up with the definition you agree as a group.

Culture

Cultural Competence

Diversity

Valuing Diversity

City's Diversity Development and Cultural Competency Plan

[Insert City's Plan here]

[Insert any definition of terminology by the City, here]

"Tell me why !!"

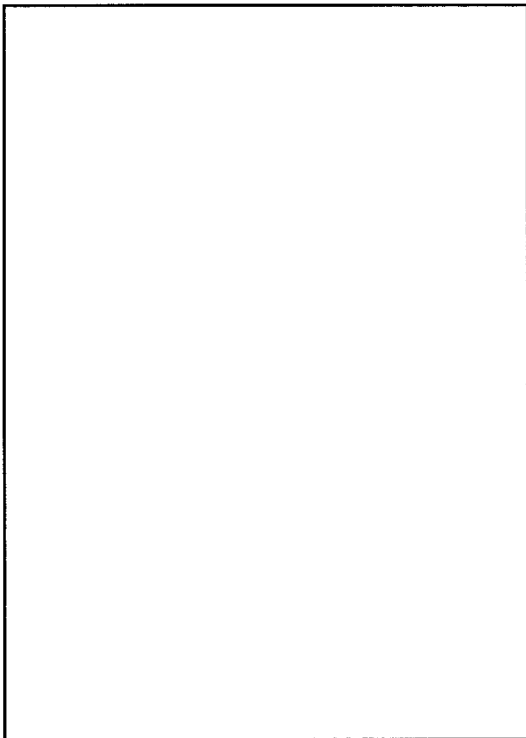[These instructions may not be printed in the workbook, but will be written on the flip chart]

STEP 1: Find a partner.
STEP 2: Decide which one of you will be Person A
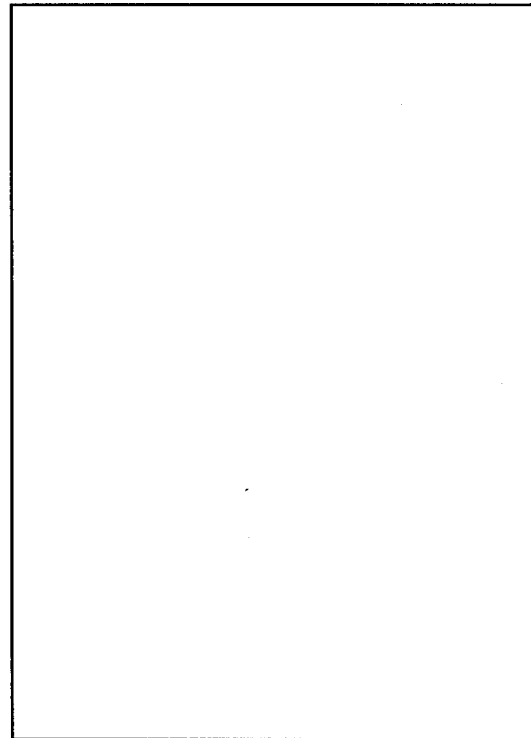and which one of your will be person B.
STEP 3: If you are Person A: Think of all the possible arguments for supporting and promoting diversity and cultural competence among the city employees. If you are Person B: Think of all the possible arguments against supporting and promoting diversity and cultural competence among the city employees.
STEP 4: Start the debate between Person A and Person B. Start from Person A, stating why he/she think it is important to support diversity. Take turns in arguing for your own position.

Person A's argument   Person B's argument

Discussion: How did you feel having to argue for your position?
Do you think you can convincingly explain why it is important for the City to develop diversity and cultural competency?

"Good news/Bad news"

1. Please think about the many groups or categories you belong to and decide on one that you would like to discuss.
2. Find a partner.
3. Share some of the stereotypes you have heard about the group or category you have selected to discuss.

All Participants:

1. What kinds of things were said?
2. Where there more positive things than negative?
3. How do you feel about the good things that were said?
4. Would you like other people to continue using those descriptions?
5. What about the bad things?
6. What conclusion can you draw about things that are said about groups in general?

[Debrief by the trainer:]
- State that people belong to more than one group.
- There may be various stereotypes about groups.
- These stereotypes affect people in different ways. Think about your feelings when you talked about the group you belong to.
- Think about how these stereotypes affect your interaction with your co-workers.
- Identify one thing you'd like to work on to avoid having damaging impact by stereotyping others.

ACTION :

"I will _____"

Organizational Cultural Competency SWOT Analysis

SWOT Analysis

The SWOT (strength, weaknesses, opportunities, threats) analysis helps in understanding the current situation of the organization. It provides a broad overview of the internal strengths and weaknesses of an organization, along with opportunities and threats from the external environment.

Think about the "strengths" and "weaknesses" of the City in relation to diversity and cultural competency. Also think about what kinds of "opportunities" there are externally that the City can capitalize on to further it's goal in promoting diversity and cultural competency. What kinds of "threats" are there externally that may hinder the City in pursuit of its goals. Put these SWOT factors in the appropriate cell of the four-pane window table. [Prepare a big SWOT table using a flip chart and put it up on the board for class discussion]

SWOT Analysis

Strength (S)	Weaknesses (W)
Opportunities (O)	Threats (T)

Action Steps

Think for a moment about an attitude or behavior that you have that you would like to change, or a new skill that you would like to learn. What steps would you take to learn a new skill or behavior?

Also identify one thing you are going to do in order to promote the City's diversity and cultural competency plan.

Action steps for myself:

Action steps for the City:

Evaluation Form 1
"What I learned in this session"

- **Please write down the things that you think you learned in this session. Write as many as you can think of. Do not refer to any of the session material. Do a free write.**

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	

Evaluation Form 2
"What I like/dislike about this session"

- **Please write down the things that you liked or disliked about this session. Write as many as you can think of.**
- **If you can, please include suggestions to improve the kinds of things you didn't like about this session.**

What I liked about this session:

What I didn't like about this session:

Suggestions:

Creating a Multicultural Workforce

Created by
The Executive Leadership Institute

Agenda

Time	Activities
25 minutes	Opening and Introduction Icebreaker exercise : "What do you know about diversity-centered hiring?"
5 minutes	Ground rules.
40 minutes	"Who gets the job?"
40 minutes	Organizational analysis
10 minutes	Break
40 minutes	"Redesigning position description"
40 minutes	Job interview role play 1 : Selecting interview panel
50 minutes	Job interview role play 2: Interview / Fish bowl observation
15 minutes	Summary and Wrap-up
15 minutes	Evaluation

Goals

1) To have the participants understand the impact of different assumptions, biases, and values on the hiring decisions.

2) To have the participants critically examine the make up of their units and/or organizations and identify the areas that need to be improved in order to make them more diversity friendly in terms of recruiting, hiring, and retention.

3) To have the participants acquire knowledge and skills necessary to develop diversity-centered position descriptions.

4) To have the participants acquire knowledge and skills to select and also be culturally competent.

Ground rules

In order to support a safe and productive environment for discussing the issues on diversity and cultural competency, we recommend the following ground rules to be adopted today.

Confidentiality:

During and after the program, feel free to share your session experience with others. But do not ascribe comments to individuals.

Disguise Examples:

During the session, do not use the names of specific individuals in your examples or discussions.

Withhold Judgment:

The purpose of discussing issues is not to reach consensus, but to share views and listen to those of others. Reserve making quick judgments on others. Reflect on your thoughts.

Share "Airtime"

When many people talk at once or the same person speaks most of the time, we miss the benefit of hearing the views of all participants. Do not dominate the discussion. Be mindful to those who haven't shared their ideas.

Take Responsibility:

Own your opinions. Start your comments with phrases like "I feel. . ."or "I think. . ." as oppose to "they said. . ." or "everyone knows . . . "

Active Participation

Willingness to participate in the activities will enhance your personal learning. You don't have to be "politically correct." Share your ideas.

Do not be a "Negaholic"

Try to think in positive manner.

Have Fun!!

Learning is enhanced when people are having fun.

Think about other ground rules that may be important to the group. Add them here:

_____

_____

_____

_____

_____

_____

_____

_____

"What do you know about diversity-centered hiring?"

In the next 3 minutes, without looking up anything, please write down, anything you know about what you know about diversity-centered hiring.

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

"Who gets the job"

A case study (Modified from Simons et all, 19996)

A medium-sized city government located in the Northwest is looking for a manager to oversee the accounting department that consists of 14 bookkeepers, controllers and accountants and 4 secretaries.

The current manager, who has been in the job for 5 years, has been promoted and recommending one of the accountants currently employed. While the city does have a history of promoting from within, it is also interested in creating a more diverse work environment. To that end, it is willing to consider outsiders. Four candidates have shown interest in the job. All have the technical skill and experience to handle the job.

John Conners is the one who has been recommended by the outgoing manger. He is a very skilled accountant, but more to the point, he has been with the city for 7 years. He is involved in the community activities, gradated from the local State University, and coaches his son in a Little League. He has good interpersonal relationships both inside and outside the company, and while he has his college degree, he continues to update his education and skills. If he does not get this promotion, he will consider leaving the city. John's biggest handicap is that he is a white make in the city looking for diversity.

Becky Cho is a co-worker of John's who has been at the company for 5 years. In fact, she and the outgoing manager started their employment ad the same time. Becky, a CPA, has exceptional accounting skills and is viewed as the expert when work related issues or questions come up. Her work relationships are mostly good, but some people are uncomfortable with the fact that she is a lesbian. While her sexual orientation is never demonstrated at work, she does bring her same-sex partner to holiday parties and company picnics. Her behavior is ver circumspect, but she doesn't deny her relationship, which is a problem for some people in the department. They think she is immoral and deviant.

Ferdinand Aguilar is an outsider who heard bout this opening through some of his fellow Filipinos at recent church meeting. He used to work for a city government in manila and since coming to the United Sates 12 years ago, he has practiced accounting in several different jobs. Currently, he is a manager of accounting at the county's facility management office overseeing 22 accountants and bookkeepers. He has depth of experience and a good track record. He is extremely involved in his ethnic community and recently joined the Rotary Club to expand his contacts. The biggest concern about Ferdinand is that most recent hires in the department are Filipino, and if he favors his fellow compatriots in future hiring, the department will be more homogeneous than diverse.

The 4th candidate, another outsider, is Malcom Washington, an African-American who is new to the area. He graduated with honors from Amherst where he got his B.S., and Wharton, where he earned his M.B.A. He was a rising start at his former company, but left to relocate with his wife who got a once-in a lifetime job in this city. Malcom is bright, charming, personable and capable. He is long on potential but short on practical experience in the public sector. He looked like a shoe-in for the job until the vice president took him and his wife out for dinner. In a town not used to interracial marriage, there was a lot of discomfort. Malcom's wife is Iranian.

Instruction:

- Read the case study individually.
- Then get together as a group and discuss each candidate and select the best one, detailing all the reasons for your thinking about each candidate.
- Select a spokesperson in your group and present who has been chose and why.

[Questions for whole group discussion]

- What were the key issues and the decisive factors in awarding, or not awarding the job?
- What assumptions did you make about each candidate?
- What values and priorities underlie your choice of candidate?
- Each of these candidates is competent to do the job. Beyond the obvious job skill, what value does each add?
- What do these issues raised in the discussion suggest about the openness of your organization? About the organization's relationship to the community?
- What would need to happen in your organization to nudge people past some of their prejudices and open the climate more?
- What might be a good starting point?

Organizational Analysis

Identifying the amount of inclusion and diversity within your work unit.

Diversity and inclusion are not the same. There can be great diversity in your organization, but suppressing diverse behaviors, thinking styles, and perspectives by requiring members to assimilate to certain mold limits diversity's fullest potential.

This exercise asks you to look at your work unit to discover:

1. What characteristics are represented on your work unit
2. How the members are similar
3. How the members are different
4. Which behaviors are allowed to surface
5. Which behaviors are suppressed

Based on this analysis, what type of persons do you need to look for if you were to make your unit more diverse: What type of mind-set do you think is necessary to your work unit- more diversity friendly and inclusive?

Unit member	Attribute and demographic characteristics	Behavior Characteristics	Behaviors allowed to surface	Behavior that are suppressed
Example Al Smith	Age-50 Gender-male Race-white Ethnicity-Italian	Sense of humor Quick temper	Sense of humor	Quick temper
Member 1				
Member 2				
Member 3				
Member 4				
Member 5				

"Redesign position description"

[Example of position description, and how to revise it in more diversity centered way, needs to be developed. Most of the example we have are for University settings. Need some modification tailoring to the city's position description]

Role Play: Job Interview

[Use the position description for the previous exercise]

1. Select 5 members from this class to serve as the interview panel for hiring a person in the above mentioned position.
   - What are the key characteristics you would look for in the interview panel members? Develop a list of characteristics.
   - Select 5 members.

2. The selected 5 members will discuss questions to ask to the interviewees.

3. The group will select 3 members to play the role of the candidate.

4. Do a role play for the interview. Other participants will observe and take notes.

General discussion

What did you notice in the way each interview panel member acted in the course of the interview?

What are the things you liked about their interview?

What are the things that you think can be improved to make the interview more culturally competent?

Evaluation Form 1
"What I learned in this session"

- Please write down the things that you think you learned in this session.
  Write as many as you can think of. Do not refer to any of the session material.
  Do a free write.

1.	
2.	
3.	
4.	
5.	
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7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	

Evaluation Form 2
"What I like/dislike about this session"

- **Please write down the things that you liked or disliked about this session. Write as many as you can think of.**
- **If you can, please include suggestions to improve the kinds of things you didn't like about this session.**

What I liked about this session:

What I didn't like about this session:

Suggestions:

Managing Diverse Workgroups

Created by
The Executive Leadership Institute

You want to have a dinner party for the following people. You love them all and want them all to get to know each other but cannot figure out what to serve.

Your uncle has always given you wonderful presents and thinks you are great. He loves pork chops and applesauce with lots and lots of red wine. He considers salad a waste of time.

Your sister and her daughter are vegetarians and very concerned about their health. You suspect that one of them is diabetic but you don't know for sure. The daughter is 10.

Your best friend from work considers cows to be sacred and doesn't drink alcohol. She is, however, just crazy about chocolate and whipped cream. She has offered to bring something from her culture but based on what you heard, you are not sure anyone else would eat it.

Your other best friend is on a diet and says she would like to come if you don't make it too difficult to stay on her low-calorie food plan. You know she has not taken a drink for several months after doing an alcohol rehab program through her work.

The next door neighbor is Jewish and eats kosher. He would like to bring his wonderful cold squash soup.

What would you serve for the following parts of the dinner?

Appetizer:

Entree:

Salad:

Vegetable:

Drinks:

Kouzes and Posner's 5 Practices of Leadership

Practice of Leadership	Ideas from Discussion	Strengths	Weaknesses
Challenge the process		1. 2. 3.	1. 2. 3.
Enable others to act		1. 2. 3.	1. 2. 3.
Modeling the way		1. 2. 3.	1. 2. 3.
Inspiring a shared vision		1. 2. 3.	1. 2. 3.
Encouraging the heart		1. 2. 3.	1. 2. 3.

LEADING & MANAGING -- WORKSHEET (Exercise A)

Directions: Good management and good leadership each require a different set of goals and skills. Organizations value the contributions of both. In this exercise you will gain a better understanding of the difference between the two so that you can sharpen your own leadership capabilities. In the following statements, who's who -- Leader or Manager? Fill in the blanks with the word that best matches the statements below -- use either the word "manager" or the word "leader." When you have finished, review the answers to each statement so you can explain your choice.

Example: "A good __(leader)____ will take his or her organization to new levels of achievement."

1.) A good _____ stays the course.

2.) A good _____ looks for ways to challenge and change the status quo.

3.) A good _____ inspires a common vision.

4.) A good _____ motivates his or her staff to do the job; a good _____ motivates the staff to **want** to do the job.

5.) A good _____ improves efficiency and helps cut costs.

6.) A good _____ delegates responsibility and gives subordinates the freedom to make their own decisions -- backing them up all the way.

7.) The word "_____" is derived from the Middle English word meaning "to go." The word "_____" is derived from the latin word meaning "hand" as in "to handle."

8.) A good _____ controls and maintains vital systems of operation.

9.) When we think of a good _____, we think of someone who brings stability, harmony and consistency to our organization.

10.) A good _____ takes risks and experiments continuously.

SCORING

For every correct answer, give yourself 10 points. **90-100 points** -- You possess an excellent understanding of the difference between managers and leaders. **80-90** -- You have a good understanding of the roles of managers and leaders. **70-80** -- You have an average understanding of the qualities expected of leaders versus managers. **60-70** -- You have a limited understanding of the skills required of managers and leaders. **60 and under** -- You need to improve your understanding of the elements of good leadership.

Conditions that Create Complexity
in the Workplace

◆Workforce diversity

◆Teaming

◆Managing Change

◆Acquisitions and mergers

◆Work/family

◆Cross-functional coordination

The human brain does not easily process complexity. Few
people are comfortable supporting contradictory ideas at
the same time. Yet in a business climate where conditions
change in a nanosecond time frame and complications grow
exponentially, business leaders must do exactly that.
Today's leaders must juggle demands that only recently
they would have thought impossible contradictions: They
must simultaneously mass produce and customize,
simultaneously wear function and corporate hats,
simultaneously think about the present and the future

Roosevelt Thomas

Human Reactions to Complexity

◆Include/Exclude

◆Deny

◆Assimilate

◆Suppress

◆Isolate

◆Tolerate

◆Build Relationships

◆Foster Mutual Adaptation

Skills Needed in
Managing the Diverse Workforce

1. Helping people care about each other

2. Helping people develop awareness of how differences can impact relationships.

3. Helping people develop communications skills to bring out the best in every team member.

4. Communicating what's appropriate, acceptable and expected to diverse employees.

5. Creating an environment where it's easy to speak up.

6. Managing employees who speak limited English.

7. Coaching diverse employees.

8. Motivating and empowering diverse employees.

9. Improving communication between men and women.

10. Defusing, managing and mediating conflict.

11. Creating a climate for growing.

Information Skills:
- Acquiring info about groups of people unlike yourself
- Acquiring info about groups you are not part of
- Acquiring info about the environment you are operating in (organizational, political, demographics, etc.)
- Networking skills
- Problem solving re: how to obtain needed info

Cognitive Skills:
- Analytical skills
- Problem solving
- Visionary
- Planning and process development
- Dissemination/Integration planning

Confidence/Attitude:
- Group noted this skill needed to be "developed within/displayed without"
- Integrity
- Honesty
- Flexibility
- Realistic
- Aware of fears of others

Self Starter:
- Motivated/Motivator
- Takes initiative to access resources
- Networks
- Ingenuity
- Flexible
- Communicator
- Persuasive

Communication Skills:
- Active listener
- Articulate
- Verbal
- Knowledge of how others communication(body language, space and proximity, cultural norms, eye contact)
- Written skills
- Able to paraphrase

Network of Resources:
- Resources for issue identification
- Professional organizations,
- Network groups
- Relationship development
- Literature/Professional journals
- Backers (upper management, industry, civic, & political leaders, etc)

Technical Skills:
- Internet literate
- Networking skills
- Written and oral communication skills
- Assess and know audience
- Strategic planning
- Project management
- Problem solving
- Research
- Collaboration
- Consensus building
- Trainer
- Conflict and change management

Elements of Culture

- Widely shared philosophy
- Heroes
- Ritual and ceremony
- Values

Factors That Determine Culture

- Innovation and Risk-Taking
- Attention to Detail
- Outcome Orientation
- People Orientation
- Team Orientation
- Aggressiveness
- Stability

Five Most Important Elements in Managing Culture

- What leaders pay attention to
- How leaders react to crises
- How leaders behave
- How leaders allocate rewards
- How leaders hire and fire individuals

Organizational Culture:
The Competing Values Assessment Instrument

Introduction

The purpose of this instrument is to assess organizational culture. In a cover letter accompanying this instrument, or in a set of verbal instructions to the respondents, the organizational unit was identified. In answering the following questions please focus on the identified organizational unit.
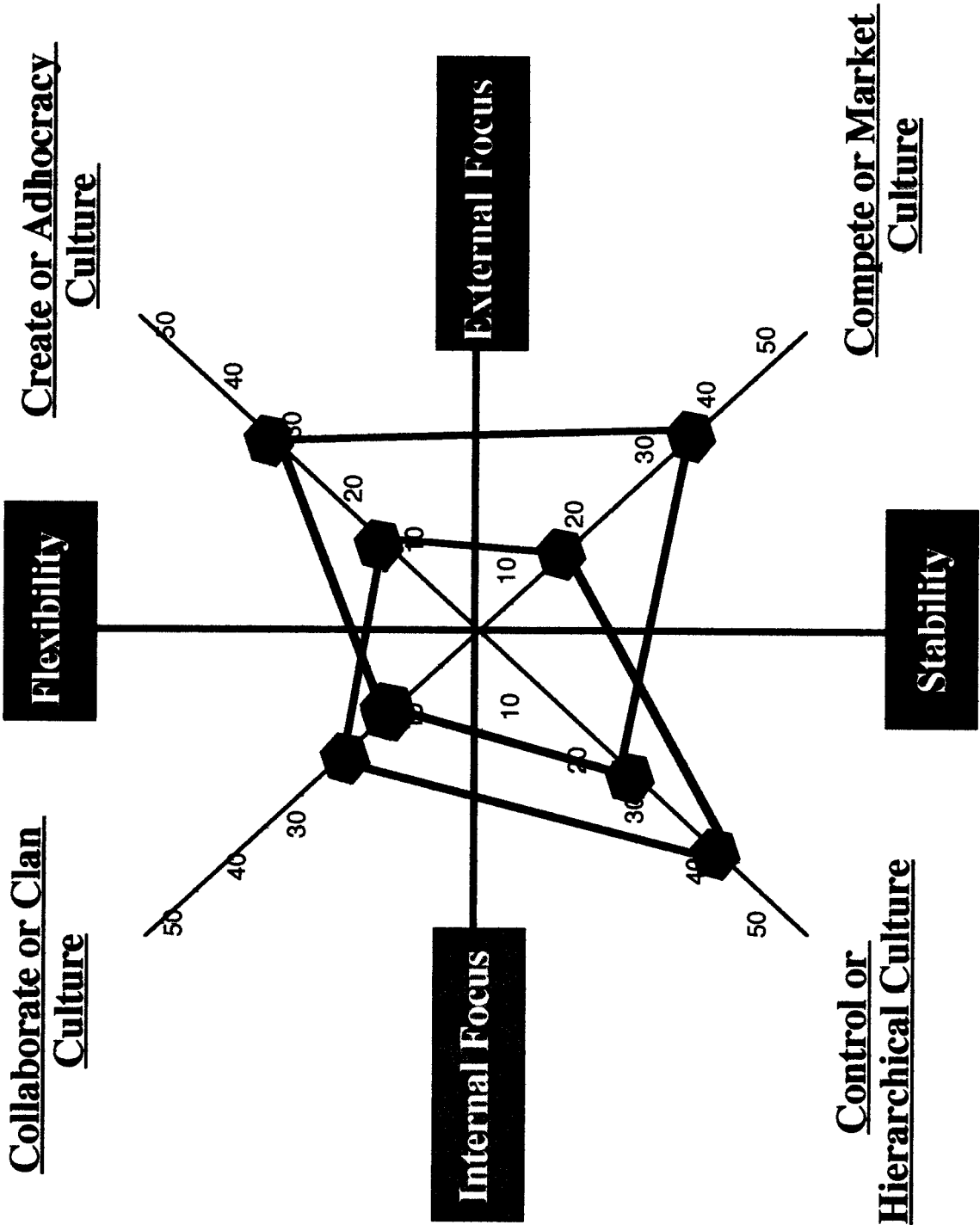
The Questions

Listed on the next two pages are six questions. Each question has four responses. Each response has a now and preferred category. Now refers to how you see the organization presently. Preferred refers to how you think the organization should be five years from now. The responses are given by dividing 100 points across each of the four responses in each of the six questions. An example follows:

Question 1

NOW   PREFERRED

A. 50   A. 40
B. 10   B. 20
C. 30   C. 20
D. 10   D. 20
Total = 100   Total = 100

In answering the questions on the following two pages, you are free to distribute the 100 points in any fashion. Just be sure that your total equals 100.

Create or Adhocracy
Culture

External Focus

Compete or Market
Culture

Flexibility

Stability

50

40

30

30

40

50

20

10

10

20

Collaborate or Clan
Culture

50

40

30

10

10

20

30

40

50

Internal Focus

Control or
Hierarchical Culture

Merging Cultures for Efficiency and Creativity: What are the issues?

In an attempt to save money and be more efficient, the City of Daywood and the County of Yellow have decided to combine departments that appear to be doing the same kind of work. The City department, called Planning, was established 20 years ago and is proud of its reputation of speedy, well presented land use plans and adjudication of disputes. The County department, called Community Renewal, has always prided itself on innovative use of lands, elegant processes for resolving disagreements and a long history of "building dialogue" between possible combatants.

The manager of Planning, John Tyler, believed that Planning was the far superior department. Tyler credited his organizations' greater effectiveness to his managers' abilities to run a "tight ship". Planning had detailed organization charts and job descriptions. Tyler believed that everyone should have clear responsibilities and narrowly defined jobs, which generates efficient performance. Employees were generally satisfied with their jobs at Planning, although some managers wished for more empowerment opportunities.

Community Renewal's administrator, Jim Rawls, did not believe n organization charts. He believed organization charts just put artificial barriers between specialists who should be working together. He encouraged people to communicate face to face rather than with written memos. The head of Zoning said, "Jim spends too much time making sure everyone understands what we're doing and listening to suggestions. Rawls was concerned with employee satisfaction and wanted everyone to feel part of the organization. Employees were often rotated among departments so they would be familiar with activities throughout the organization. Although Community Renewal wasn't as fast as Planning, they were able to bring new ideas online more quickly, work bugs out of complex problems more accurately and achieve higher quality because of superb employee commitment and collaboration.

It is the end of May and Francis Myer, the mayor of Daywood has just announced the merger to the press. Both management teams are proud of their cultures and have unflattering opinions of the other's. Each organization's customers are rather loyal and their technologies are compatible so Tyler believes a combined organization will be even more effective, particularly in a time of rapid change.

The Community Renewal managers resisted the idea of an acquisition but the Planning manager is determined to unify the two departments quickly, increase both efficiency and quality and be seen as a strong community builder by year's end.

1. What kind of culture is dominant at Planning? Why do you say that?
2. What kind of culture is dominant at Community Renewal? Why do you say that?
3. The mayor and the managers all knew about the different cultures - why did they go forward with the merger?
4. Do you think the two organizations will merge cultures by the end of the year? Why or why not?
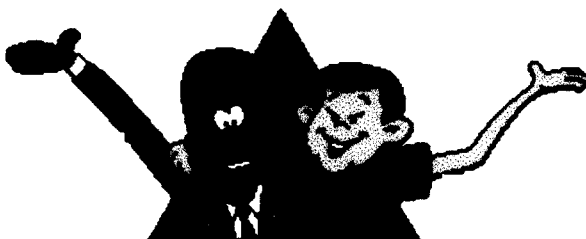
WHO IS COVERED BY
Equal Employment or other
Workplace Laws

Methodists	High School Dropouts	Filipinos
College Students	Earth First Members	Amputees
Psychotics	Smokers	Homosexuals
Russians	Protestants	Blind people
Obese people	Men over 40	Catholics
Injured workers	Vegetarians	Vietnam Vets
Native Americans	AIDS victims	Jewish people
Ex-drug addicts	African-Americans	WW II vets
Parents	Teenagers	Brazilians

Diversity Competency Model for Individuals

Work, Tasks and Responsibilities	Development Phase 1	Development Phase 2	Development Phase 3
	Awareness	Understanding	Action Steps
Communications			
Personal evaluation and feedback			
Employee development			
Conflict resolution			
Group (team) decision making			
Selection (hiring and promotion)			
Delegation and empowerment			

The Legal Context of the Public Sector Supervisor
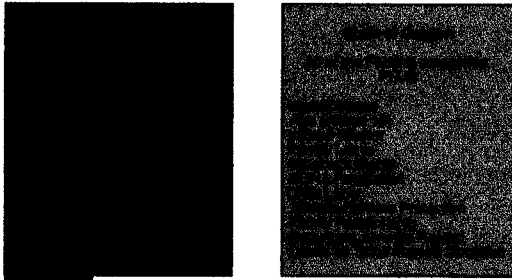
Sharron Noone

Legal Rights of Public Sector Employees

- Constitutional
- Statutory
- Common law
- Organizational policy

Specific Topics for This Session

- EEO and Other Worker's Rights Laws
- Employee Privacy and HIPPA
- Wage and Hour
- Injured Worker
- OFLA/FMLA

EEO and Other Wor[...]

Theories of Disc[...]

Specific Intent	=	1. Unwelcome sexual advances 2. Racial name-calling 3. Teasing someone of a different religion
Different Treatment	=	1. Men have to lift more than women 2. Pattern of discipline based on age 3. Minorities preferred over whites
Adverse Impact	=	1. Tall people preferred over shorter people 2. Education requirements that are not job related
Reasonable Accommodation	=	1. No effort made to accommodate religious requirements 2. Not providing any accommodation for disability

---

Harassment

Harassment is behavior that is:
Bothering, irritating, provoking, bullying, intimidating on any basis.

ILLEGAL harassment is behavior that:
[...]ed by the receiver as unwelcome now;
[...]hostile or negative environment over time;
[...]cause of the person's "protected class" status;
[...] spoken or written but may be body language.

Supervisor's Re▓▓

•If you become aware, either formally or informally, that harassment is occurring, immediately talk to your manager or HR for suggestions on how to proceed. Do not ignore any formal complaint!

•Make sure that your own behavior is not sexually offensive on a "protected class" basis.

▓▓▓▓▓work atmosphere that is free of name-calling, suggestive ▓▓▓▓▓fensive pictures, cartoons or objects.

▓▓▓▓mployees with any kind of problem to discuss it with you or ▓▓▓▓ supervisor.

Medical Privacy ▓

- ### Americans with Disabilities Act
  - The results of all medical examinations or information from inquiries about a disability must be kept confidential, and maintained in separate medical files. You may provide medical information required by State workers' compensation laws to the agencies that ▓▓▓▓nister such laws.

- ### ▓▓AA
  ▓▓▓ivacy Rule protects all "Individually identifiable health ▓▓▓ation" held or transmitted by a covered entity or its ▓▓ss associate, in any form or media, whether electronic, ▓▓ or oral.

What can you say ▓▓▓▓▓ circumstances?

- An employee has a seizure at work. A co-worker asks you what has caused the seizure - what can you say?
- A person with a sight disability has a big-▓screen monitor. A co-worker asks why ▓▓▓ person gets the special monitor. ▓▓▓t is your lawful reply?
  ▓▓▓ hear rumors that one of the ▓▓ployees is HIV positive. What do you ▓▓ say?

Interpreting the Conflict Style Indicator

All five styles of conflict are good in some situations. Deciding which one to use depends on the situation and your skills. Each of us is capable of using all five conflict-handling modes: none of us can be characterized as having a single rigid style, even if your score on a style is very high!! Each individual uses some styles better than others, and therefore tends to rely on those styles more heavily. You may be selling yourself short when you do that. For almost everyone, each style is useful under certain circumstances.

Type A = Competing style. Assertive and uncooperative - an individual pursues his or her own concerns at the other person's expense. This is a power-motivated mode, in which one uses whatever power seems appropriate to win one's own position - one's ability to argue, one's rank, etc. Competing might also mean standing up for your own rights, defending a position you believe is correct.

> *Positive uses for this style of conflict:*
> 1. When there is an emergency
> 2. On important issues where unpopular courses of action like discipline or layoffs must be implemented
> 3. On important issues where you **know** you are right
> 4. To protect yourself from other people with Competing conflict style

Type B = Collaborating style. Both assertive and cooperative. An attempt to work with the other person to find some solution which fully satisfies the concerns of both persons. It means digging into an issue to identify the underlying concerns of the two individuals and to find an alternative which meets both sets of concerns. Collaborating might mean exploring a disagreement to learn from each other's insights, concluding to resolve some condition which would otherwise have them competing for resources, or confronting and trying to find a creative solution to an interpersonal problem.

Positive uses for this style of conflict:
1. To find a solution that integrates two sets of concern that are both too important to compromise
2. When you want to learn from the other person
3. To merge insights from people with different views of a problem
4. To gain commitment from all people involved
5. To work through hard feelings that are getting in the way of a personal relationship.

Type C = Compromising style. Midway between being assertive and being cooperative. The objective is to find some reasonably easy, mutually acceptable solution which partially satisfies both parties. Compromising means giving up rather than competing, but you still get major parts of your issues built into the solution. Compromise probably means splitting the
difference.

Positive uses for this style of conflict:
1. When goals are important but not as important as personal feelings
2. When two equally powerful people want very different solutions
3. To find temporary solutions for complex, long-term problems
4. To find any solution if time is a big issue

Type D = Avoiding style. Unassertive and uncooperative. This individual does not immediately pursue personal concerns or those of the other person. The avoider does not address the conflict. Avoiding might take the form of diplomatically sidestepping an issue, postponing an issue to a better time, or simply withdrawing from a threatening situation.

Positive uses for this style of conflict:
1. When an issue is trivial or other more important issues must be resolved
2. When you have no power and no chance of even being heard (Sometimes you fool yourself into believing this when it is not true!!)
3. When the damage you might do by confronting a person might not be worth the benefits of the solution

Type E = Accommodating style. Unassertive and cooperative. When accommodating, you neglect personal concerns to satisfy the needs of another person. There is an element of self-sacrifice in this style. Accommodating might take the form of charity, obeying a person's order when you would prefer not to, or yielding to another's point of view without expressing your own.

Positive uses for this style of conflict:
1. When you realize you are wrong - to allow a better position to be heard
2. When the issue is much more important to the other person than it is to you
3. To build up social credits to be used next time!
4. When you are outmatched and losing
5. When preserving harmony is especially important
6. To allow others to learn from their own mistakes if the consequences are not too high

Supervisory Role

Sam's Problem: Late Lunches

Supervisor's method of persuasion: promise a reward

Sam's Role

Sam's Problem: Late Lunches

Real way to persuade employee: fear of punishment

Observer

What is the problem they are discussing?

What was the supervisor's method? Did it work?

What was the key to motivating Sam? Did he get what he wanted?

Ralph Carey, after 18 years as a patrol officer, reluctantly took the Sergeant's examination. Over the years, he had developed into a very competent officer. He enjoyed patrol and was not sure that over the years he was left alone by his immediate supervisor. He responded to all of the radio calls rapidly and efficiently. His reports are accurate, thorough and of very high quality. Over the years he has become acquainted with numerous individuals and was aware of what was happening on his beat. He had no difficulty in adhering to departmental policies and felt the rules and regulations were appropriate and fair.

He enjoyed working alone but was not reluctant to call for backup when he felt it was necessary. He spent a lot of time out of his vehicle, talking with merchants and vendors. He was well acquainted with most of the trouble spots on his beat and concentrated on those locations. He made numerous arrests and referred numerous citizens to appropriate social service agencies.

When the results of the Sergeant's exam was announced, he found that he was number eight on the list and within one year he was promoted and assigned to a patrol team. His team consisted of 8 officers. Three of the officers had less than one year of service and the remainder had no more than five. Several of his officers consumed the preponderance of his time and he did his best to supervise them closely.

However Carey was impatient with the development of these newer officers and found it difficult to deal with each officer as an individual. He did not want to alienate the officers so he was reluctant to let them know how well they were doing. He found that he was unable to tell the officers that their standard of performance was not acceptable. He wanted to praise the officers but could not because of their inability to perform their jobs at an acceptable level. Carey was concerned that if he became too authoritarian, the officers he was supervising would not improve their job performance.

The failure to perform adequately has come to the attention of the Captain. You are the Lieutenant for Carey and you have avoided talking to him about the problems since no publicity has occurred about the poor performance. You like Carey and he used to be your partner. Now, however, you are to do "something" to deal with the issue.

- What is Carey's conflict style? What is your (the Lieutenant's) conflict style?

- What is Carey's management style? What is your (the Lieutenant's) management style?

- Who would you consider "mature", given Blanchard's definition?

- What should you do with Sergeant Carey, given the conflict style of both of you?

- Do you see ethical issues for the Lieutenant? What are they?

Diversity Competency Model for Organizations

Area of Work Activity	Development Phase 1 Awareness	Development Phase 2 Understanding	Development Phase 3 Action Steps
Managing diversity is integrated into the organization's strategic planning process			
The value of diversity as an organizational resource is included in statements of vision, mission or values.			
The organization is seeded with strong change agents committed to working on managing diversity.			
A formal plan is established for measuring success.			
A well-accepted plan is developed for achieving or maintaining demographic diversity.			

"What Would You Do?"

1. The group you work with has been together a long time and pretty well knows what people think is funny and what isn't. A man comes to work and says he does not like the sexual jokes and discussions that are going on, even though no one is saying them to him.

    *   As an employee, what must you do in order to follow the City of Portland's harassment policy?

    *   As a supervisor, what must you do in order to follow the City of Portland's harassment policy?

2. An employee has an injured foot and is resting it in an elevated position on an office chair. Another employee approaches and tickles it in a friendly gesture. The first employee laughs, but tells the second one to stop. The second employee leaves, but on the way back through, the second employee tickles the foot again. This time the first employee yells at the second to stop and says the second employee is harassing and will be reported (which the first employee actually does.)

    *   Under the City of Portland's policy, if one is a different sex than the other, does that make a difference? If one is a different national origin than the other, does that make a difference?

3.   You have repeatedly asked an employee out and have been told " no," pleasantly but firmly. You are angry about being turned down and you show it by making nasty comments about the employee to anyone who will listen. The person you asked out tells you that if you don't knock it off, you could be faced with a sexual harassment complaint. You tell the employee he/she doesn't have a reason to file because you have stopped asking for a date.

   • Are you correct?

4.   The women and men that work with you are all "touchers." They pat people on the back, or take hold of their arm, or put their arms around each other's waists when they walk. There is no sexual content to the touching; they are just being friendly. You are **not** a toucher! All of this makes you uncomfortable but you are afraid that if you say anything you will not "fit in."

   • What would you do?

   • Is there anything that anyone else should do?

5. You have worked for this organization for a long time and you don't like the racial, sexual and religious jokes and name-calling that occur daily. One day, a Human Resources representative comes to you and asks you if you are aware of any racial or sexual behavior that you don't like. You are **afraid** that if you tell what you know, someone will get in trouble, and you will be given a bad time because you "snitched."

- If it became known that you were the one who told HR that you didn't like the jokes and name-calling, how do you think your **current** co-workers would respond? What could you have done to make the situation easier for everyone?

6. You hire a new supervisor. Right from the start there are problems. He makes a lot of suggestive comments about what each woman looks like in her clothes, what a good time each woman must have in bed, and other such remarks. He also has a large calendar in his office of women in brief swimsuits. He makes a few suggestive comments to you, but he concentrates most of his energy on the two youngest women in the office. They talk to you about how uncomfortable they are with his behavior, but they are afraid to say anything.

- Is there anything you should have done about this new supervisor before today when the women come to talk to you?

- What should you do now?

7. You have been asking out Jean, a female member of your staff. She has refused to see you in the evenings but she remains friendly and, in your opinion, flirtatious. She says she has a steady relationship and she does not wish to jeopardize it. You begin to put more friendly pressure on; you ask her out for lunch in front of other people, you make little comments and jokes about her body, and you hint that a promotion might occur for her if she was "good to her boss." You get a call from your supervisor and he sounds very angry; he says he has a complaint from Jean.

   • What do you think will happen now?

8. John has made a second "informal" complaint to you about employees making fun of him because he is "old, scrawny and a wimp." He says he goes along with it because he fears they will make life difficult if he does not. He wants the comments to stop, but he does not want anyone to know that he made a complaint to you.

   • What should you do?

   A week later, John makes another complaint, and mentions that since nothing has changed, maybe he will have to go to HR to find out what to do next.

   • Will it matter to HR that he has made informal complaints before?

Diversity Competency Model for Organizations

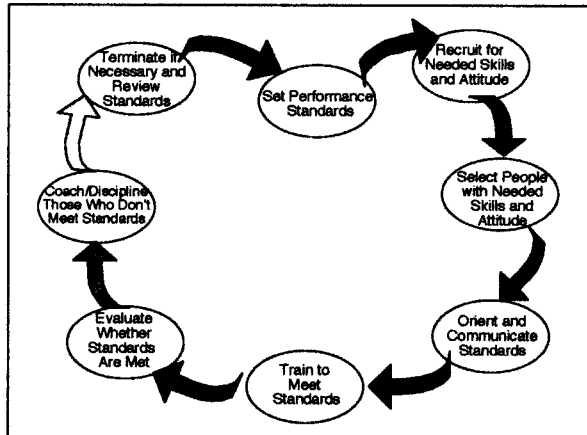| Area of Work	Phase 1 Awareness	Phase 2 Understanding	Phase 3 Action Steps
Diversity competency is a criterion in hiring decisions.	A series of EEO law suits convinces HR that problems between employees of different ages and races are causing problems that are costing a lot of money	In training sessions that HR goes to they discover that: Many organizations have such problems and that supervisors don't know how to deal with them. One strategy for dealing with this problem is to hire people who are used to working in diverse situations and have been successful in diverse situations	HR decides to do the following: ***Include wording in the job ads that working successfully in a diverse group is a requirement of the job. ***Ask applicants to include information about places where worked with diversity. ***Screen applications and resumes for indications that a person has worked in a diverse work environment before. Give extra points for those who have such experience. ***Develop questions that inquire about diverse workplaces and their methods of dealing with conflict; determine what answers the organization would like to have in order to consider hiring. ***Check references based on success in working with diverse work groups.

Performance Management and Employee Appraisal
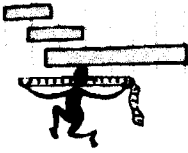
Sharron Noone,
Ph.D.
Facilitator

Objectives for This Session

- What do we mean by performance management?
- Why is performance management important?
- What are the steps in performance management?
- How can YOU enhance performance at each step of the process?
- How can you BEST impact performance?

Terminate if Necessary and Review Standards

Set Performance Standards

Recruit for Needed Skills and Attitude

Select People with Needed Skills and Attitude

Coach/Discipline Those Who Don't Meet Standards

Orient and Communicate Standards

Evaluate Whether Standards Are Met

Train to Meet Standards

Performance management that is effective:

- Focuses on feedback and goals
- Is individualized
- Takes time but leads to better quality and more work done
- Only works long-term if improvement gets as much attention as deficiency

Ways to destroy employee morale (and performance)

- Punish people for results beyond their control
- Treat everyone the same regardless of performance
- Ask for input then don't use it
- Communicate only by email or memo
- Ask people to care more about their jobs than their lives
- Expect 12 hours of work in 8 hours
- Favor certain employees
- Micromanage when it is not appropriate

Possible benefits to supervisors of effective performance management:

- Better relationship to employees
- Quantity of work
- Quality of work
- Reputation and career path
- Personal satisfaction

Common supervisor concerns about performance management

- "I'm uncomfortable telling people how they are doing, especially if the news is bad."
- "It's too hard to evaluate - there are too many things to consider and I don't have the time."
- "No one cares if I evaluate so why should I take the time and effort?"

Why have performance standards?

- Clarity of expectations for you and employee
- Basis for performance management evaluation in both positive and negative directions
- Creates equality of evaluation
- Acts as basis for department performance improvement

How does effective orientation impact employee performance?

- Sets expectations clearly if done well
- Creates basis for evaluation with employee
- Builds trust with supervisor and organization
- Allows employee to feel productive more quickly, which creates confidence

Sources of employee problems at all levels

- Outside barriers exist that they cannot and sometimes you cannot overcome.
- They don't know how
- They don't know why
- They think they have a better way
- They don't like your way
- They have other priorities

- They think it is your job
- Co-workers do it differently than you describe and nothing bad happens to them
- There are no consequences of whether or not I do it your way
- They have personal problems

Impact on organization of having problem employees

- The problem employee typically has a lost-time rate six times higher than a member of non-problem groups and is a more frequent claimer of medical insurance.
- The problem employee is 60% more likely to have an accident.
- The problem employee produces about 2/3 the amount of a non-problem employee.
- A problem employee is about four times more likely to have substance abuse problems.

What elements need to be evaluated in performance management?

- Misconduct (breaking the rules)
- Poor quality or quantity of performance standards, guidelines or expectations
- High quality or quantity of performance standards, guidelines or expectations

Coaching or Discipline - How to Choose
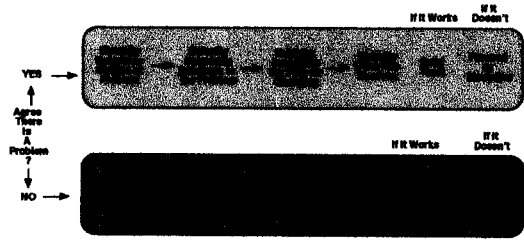
Essence of performance management

- ● What are the positive consequences of performing well?
- ● What are the negative consequences of NOT performing well?

A Supervisor's Checklist for
Helping New Employees Succeed

* Realize the first day on the job may be the most important day on the job.

* Make that first day a good one for every new employee. Be there on their first day!

* Be sure every new hire has an up-to-date copy of all relevant employee handbooks, policy manuals, instruction manuals and job descriptions.

* Compile and hand-out your own New Employee Kit containing other useful information which is not normally found in the company's all-purpose employee handbook, such as a daily schedule, a map of the workplace, an employee directory, issues of past employee newsletters and suggestions for favorite lunch spots.

* Help each newcomer with insurance forms, personnel office paperwork and other red tape. (The first day on the job is too exciting to spend all the time filling out forms.)

* Be sure proper accommodations have been made for any employee handicap or disability.

* Arrange for any training needed to fill in gaps in the new employee's knowledge or skills.

* Schedule a transition period when the outgoing worker can work side-by-side with the newcomer for awhile if possible.

* Conduct a personal briefing (orientation) for each new hire, including a walk-through of the entire factory, shop or office.

* Find out what the new employee wants to be called.

* Double-check that the new employee has everything needed to do the job (i.e., tools, materials, supplies, etc.).

* Review all applicable safety measures. (Don't assume the new employee already knows all of these things.)

* Find out something about each new employee's background, family and

personal interests and share some of your own. (It's another way to humanize the supervisor-subordinate relationship.) **Be careful with this one but it does help.**

* Introduce new employees to all the "right people," including the union rep or shop steward.

* Institute a "Buddy System" whereby each new hire is matched up with a positive, experienced mentor. The role of the mentor is to serve as an informal coach, counselor and confidante.

* Introduce new employees to the culture (belief system) of the organization. Don't leave this up to the complainers and whiners who may misrepresent what's important, what's valued and what's allowed.

* Be sure every new worker knows the "mission" of the organization and his/her role in fulfilling it.

* Help with socialization (i.e., arrange for someone to eat lunch with the newcomer during the first few days, include new employees in informal after-work social gatherings, sign-up the newcomer for the company's bowling team, etc.)

* Offer to help with the details of getting settled in a new community if needed, such as finding day-care and arranging for utility hook-ups.

* Provide tips on other personal matters such as proper dress, where to park and the best routes for avoiding rush hour traffic snarls.

* Encourage questions. Give honest answers.

* Be sure all newcomers know where to go for help, including the Employee's Assistance Program (EAP) and the Credit Union.

* Adjust work standards, time deadlines, production quotas or performance expectations as needed for new employees.

* Show confidence in the new employee's ability to succeed on the job.

* Maintain zero tolerance for any form of discrimination in the workplace.

* Stress teamwork. Convince all employees (beginners and veterans alike) that each has a stake in the success of the other.

* Don't allow veteran crew or staff members to take advantage of newcomers.

* Intervene to straighten out any problems at the first sign of trouble.
(Don't let minor misunderstandings mushroom into major blowups).

* Check with each new employee at the end of the first day, the first week, the first month. (Good supervisors always know how things are going with their new hires.)

* Try to end the employee's first day, week and month on a positive note.

* Give newcomers positive feedback and reinforcement as appropriate. Give new employees some space. (Don't hover or smother newcomers with "snoopervision."

* Make a big deal when the new employee receives his/her first paycheck. ("Now, you're really one of us.")

* Be friendly. Act like you care. (It shouldn't have to be an act.)

Make it fun!

Does your work group need to "team build?"

To what extent is there evidence of the following problems in your work unit? In your supervisory/management group?

	Low Evidence		Some Evidence	High Evidence	
1. Loss of production or work unit output.	1	2	3	4	5
2. Grievances or complaints within the work unit.	1	2	3	4	5
3. Conflicts or hostility among the group members.	1	2	3	4	5
4. Confusion about assignments or unclear relationships between people.	1	2	3	4	5
5. Lack of clear goals or lack of commitment to goals.	1	2	3	4	5
6. Apathy or general lack of interest or involvement of unit members.	1	2	3	4	5
7. Lack of risk-taking, innovation, imagination or taking initiative.	1	2	3	4	5
8. Ineffective staff meetings.	1	2	3	4	5
9. Problems in working with the boss.	1	2	3	4	5
10. Poor communication: people afraid to speak or not listening to each other.	1	2	3	4	5
11. Lack of trust between boss and members or between members.	1	2	3	4	5
12. Decisions made that people do not understand or agree with.	1	2	3	4	5
13. People feel that good work is not recognized or rewarded.	1	2	3	4	5
14. People are not encouraged to work together in better team effort.	1	2	3	4	5

Interpretation: Add up the score for the 14 items. 70 is the highest score possible. If your score is between 14 and 28, you are already a team. If your score is 29 and 42, there is some evidence but no immediate pressure unless two or three items are very high. If your score is 43 or above, you need to team build NOW.

These are situations supervisors have submitted as concerns. In each case, please figure out the following:

☐ What do you really want to have happen in each case?
☐ Is someone else other than the employees really the problem here?
☐ What motivation do you think SHOULD be able to use to get them to change?
☐ What would it take for you to have the influence to make this change happen?

1 How do you motivate (change the behavior) of the crew when the prior supervisor had let them get away with breaking the rules, and, as the new supervisor, you are enforcing them. You have conversations like "you can't wash your personal rigs at the city shop," or " you can't use sick time to go for two days to visit a friend who is having surgery." Afterward, the employees whine like junior high kids, using phrases like "low morale."

2 I know that our department is going through a lot of budget issues right now. With the tighter restraints there have been more demands made on the employee to do more with less. Employees are getting frustrated because they are not feeling appreciated and more demand is being put on them on top of everything that most already do. Their cup is running over.

3 How do you handle the impact on the group of "unmotivational" rules or requirements that are imposed from external sources over which the group has no control?

4 What can a manager do to handle "overbearing" department managers, supervisors, or group members?

5 What can a manager do when some members of a service team do not want to work at the same high-level as the rest of the team?

6 How can a middle supervisor empower his or her work group when upper management empowers the middle manager to a certain extent but doesn't want the employees to be empowered or have a mind of their own? (Not sure if "upper management" refers just to the next level up or to the department director.)

7 How can you motivate your work group when they see: 1) employees in another department getting to wear whatever they want; 2) come and go as they please; 3) letting voice mail pickup for them, even though it's against the City wide policies that you enforce in your department?

Courage in Leadership – What Does it Require of You?
Diversity Management

Action	Yes	Too Hard
Calling someone who is difficult for you to speak with and suggest you have coffee.		
Giving the leader ideas about what could be better and offering to do make it work.		
Registering for a continuing education class or workshop on something that gives you more information about a diversity topic.		
Providing support for someone who is not feeling well.		
Learning to coach well with someone whose ideas are new or difficult for you.		
Confronting people you like about their language or actions toward a person who is "different"		
Telling a group you don't think a joke is funny because it makes fun of people.		
Model inclusiveness in your own relationships and friendships at work.		
Asking someone to lunch who is deformed or who people stare at.		
Confronting another supervisor or manager about their behavior that is contrary to City diversity policy		
Ask for suggestions on how to get the outcome you want without doing it "your way"		
Telling someone what your diversity goals are and asking them for help in achieving them.		

Creating and Maintaining an Inclusive Work Environment

Created by
The Executive Leadership Institute

Module 4: Creating & Maintaining an Inclusive Work Environment

Agenda

Time	Activity
20 min.	**Opening Activities** • Introduction & Overview of workforce trends • Participant Introductions • Agenda, goals, learning objectives & groundrules
25 min.	Exercise: *"What we know about the City's diversity programs..."* • Small groups discuss and record perceptions • Large group—discuss key differences and relationships between programs and their goals.
55 min.	Exercise: *Preferred future* • Small groups--What level of inclusiveness can we envision? • Large Group--How far is the City from this ideal? • Small groups--What will it take to move to this future? • Large group—Define "predominant norms"
15 min.	BREAK
20 min.	Exercise: *Identify key features of Diversity Development* • Small groups—Locate diversity development level, using model. • Large group—What norms predominate? Who makes decisions? Who has influence? Whose leadership style prevails? What stabilizes the predominant pattern? What disrupts it?
35 min.	Exercise: *"Unpacking the invisible knapsack"* • Small groups—examine privilege associated with gender, ethnicity, ability / disability, sexual orientation, etc. • Large group—how do these differences affect us at work? In our roles? With customers? With co-workers? With our supervisors?
50 min.	Exercise: *What helps / hinders in talking about culture and relative privilege?* • Small groups—brainstorm lists of barriers and supports. • In triads—share incidents of "culture collisions" or discomfort; consider ways to improve inter-cultural competence. • Large group—using "dialog" techniques, pose questions that will build on cultural strengths in communications, leadership, problem solving, conflict resolution.
15 min.	Conclusion—Next Steps • Participants identify major points from the session. • Complete "next steps" worksheet focused on day to day leadership, decision making, problem solving.

Introductions

- **Name**

- **Your role here at work**

- **Where you are from**

- **Where your parents are from**

- **What you hope to gain from being here today**

Notes

_____

_____

_____

_____

_____

_____

Affirmative Action, Diversity, and Multiculturalism

	EEO/AA	DIVERSITY	MULTICULTURALISM
ORIGIN	Government Initiated	Business Sector	Change Agents
DRIVER	Legally Driven	Productivity Driven	Ethics, Idealism
MEASURES OF SUCCESS	Employment statistics	Profits and productivity	Shared power and influence
PERSPECTIVE	Problems	Opportunities	Society without discrimination
GOAL	Assumes Assimilation	Assumes Integration	Assumes equal influence
FOCUS	Internally Focused	Internally and Externally Focused	Societal as well as organizational focus
RESPONSIBLE PARTIES	Personnel Department	Individuals	Policy makers and groups
MANAGEMENT STYLE	Reactive	Proactive	Visionary
CAUSAL THEORY	Unequal access	Individual prejudice	Group, institutionalized, and societal privilege & dominance
LIMITATIONS	Does not address culture	Focus is on business, not on social consequences of discrimination.	Risks branding all white people as "beneficiaries" of discrimination.

What is Culture?

_____

_____

_____

What is Intercultural Communication?

_____

_____

_____

What leadership role do we envision?

_____

_____

_____

Definitions

Culture: Learned and shared experience, beliefs, behaviors, values, and way of life of a group of people.

Cultural Generalization: The actual patterns of beliefs, behaviors and values that the majority of people in a cultural group may hold.

Cultural Stereotype: Generalizing conclusions about a few people to an entire group; applying a cultural generalization to *all* members of a group.

Intercultural Communication: Study and practice of interaction between people whose cultures are different.

Workplace Diversity: Diversity refers to significant differences among workers such as gender, ethnic background, social class, age, national citizenship, learning style, personality profile, religious preference, and sexual orientation.

Valuing Diversity: The act of acknowledging, respecting, and valuing the differences among people or groups to create a more productive work environment.

Managing Diversity: fully including and utilizing all people in the workforce, maximizing their contributions toward the mission of the organization.

Diversity Leadership: Taking initiative to create and maintain an inclusive environment; modeling and facilitating inclusive communications and collaboration among members of the organization. Accommodating needs of specific groups.

Multiculturalism: Addressing systemic barriers and patterns of dominance; actively creating processes that result in power sharing.

A Multicultural Organization– An organization which reflects the contributions and interests of diverse social groups, and no one group's norms or world view dominates the organization's functioning.

Diversity Development

Level One-The Monocultural Organization

Stage 1: Exclusionary

- One group dominates others.
- Attempts made to limit participation of other groups.

Stage 2: The Club

- A monocultural, monogender perspective is the norm.
- Limited number of selected diverse group members are allowed.
- Policies change only under pressure.
- Race and gender are primary discriminators, but others are included.

Level Two-The Nondiscriminating Organization

Stage 3: Compliance

- Seeks to change sexual and racial profile.
- Allows token representation in management.
- Everyone must be a team player.
- Competence requirements are higher for outsiders.

Stage 4: Affirmative Action

- Active recruitment.
- Active support for growth and development.
- Member encouragement.
- Concept of diversity expanded to include others.
- Must be team player.

Level Three-The Multicultural Organization

Stage 5: Redefining

- Organization is in transition.
- All aspects of organization under consideration.
- Explores potential benefits of a diverse, multicultural workforce.
- Committed to power-sharing practices.
- Searches for alternative management models that promote inclusion.

Stage 6: Multicultural

- Organization reflects contributions and interests of diverse cultures.
- Is committed to eradication of social oppression.
- Is sensitive to potential violations of all social groups.
- Diverse social cultural groups are influential at all levels of organization.
- Follows through on broader social responsibility.

Privilege

"Privilege" describes unearned rights, benefits, immunity and favors available to individuals and groups solely on the basis of their class, race, religion, gender, sexual orientation, physical ability or other key characteristic.

- .Advantages that one group gains from the disadvantages of others.

- Unearned advantages and benefits based on social class, economic status, religion, sex, and ethnic identity.

- An invisible package of unearned assets that I can count on cashing in each day.

- Door that open for me through no virtues of my own.

- Unearned power and dominance based on race or gender.

- Ability to dominate while denying that systems of domination exist.

Unpacking the Invisible Weightless Knapsack

Peggy McIntosh (Excerpts)

... I have come to see white privilege as an invisible package of unearned assets that I can count on cashing in each day, but about which I was "meant" to remain oblivious. White privilege is like an invisible weightless knapsack of special provisions, maps, passports, codebooks, visas, clothes, tools , and blank checks.

... I have chosen those conditions that I think in my case attach somewhat more to skin-color privilege than to class, religion, ethnic status, or geographic location, though of course all these other factors are intricately intertwined. As far as I can tell, my African American coworkers, friends, and acquaintances with whom I come into daily or frequent contact in this particular time, place and time of work cannot count on most of these conditions.

If I should need to move, I can be pretty sure of renting or purchasing housing in an area which I can afford and in which I would want to live.

I can be pretty sure that my neighbors in such a location will be neutral or pleasant to me.

I can turn on the television or open to the front page of the paper and see people of my race widely represented.

When I am told about our national heritage or about "civilization," I am shown that people of my color made it what it is.

If I want to, I can be pretty sure of finding a publisher for this piece on white privilege.

Whether I use checks, credit cards or cash, I can count on my skin color not to work against the appearance of financial reliability.

I can arrange to protect my children most of the time from people who might not like them.

I do not have to educate my children to be aware of systemic racism for their own daily physical protection.

I can do well in a challenging situation without being called a credit to my race.

I am never asked to speak for all the people of my racial group.

I can remain oblivious of the language and customs of persons of color who constitute the world's majority without feeling in my culture any penalty for such oblivion.

If a traffic cop pulls me over or if the IRS audits my tax return, I can be sure I

haven't been singled out because of my race.

I can expect figurative language and imagery in all of the arts to testify to experiences of my race.

I can travel alone or with my spouse without expecting embarrassment or hostility in those who deal with us.

I have no difficulty finding neighborhoods where people approve of our household.

My children are given texts and classes which implicitly support our kind of family unit and do not turn them against my choice of domestic partnership.

I will feel welcomed and "normal" in the usual walks of public life, institutional and social.

Unpacking the Knapsack

- *How does privilege influence our work?*

- *In what ways do we see privilege engaged in our workplace?*

- *In what ways do we inadvertently engage privilege in our work?*

- *How can we check out the effects of this?*

- *How can we respond when this occurs?*

Organizational Dynamics

-or-

"Why Friendly Co-Workers & Individual Action are not Enough"

Predominant Norms

Preference patterns of the traditional majority or dominant group, backed up by power.

Internalized Oppression

The devaluing of ones own identity and culture according to societal norms.

Invisibility

Ignoring or denying the existence of histories and achievements of certain groups of people.

Stereotyping

A simplified mental picture of an individual or group of people who are perceived to share certain characteristics.

Tokenism

A limited number of people from non-dominant groups are chosen for prestigious positions in order to deflect criticism of discrimination.

Individual Solutions

Seeking to create change at the individual level rather than at the level of institutions.

Assimilation

Taking on the appearance and values of the dominant culture.

Barriers to Talking about Privilege & Exclusion

Below are several challenges we face when we raise the issues of privilege and exclusion. Uncomfortable feelings cause several variations of "fight or flight" responses. (For the purposes of this handout, the references to "we" reflect those who have relatively more privilege in the workplace).

"Talking about this issue is divisive"
Conversations about privilege *can* be difficult. However, not talking about these issues does not make the divisions go away.

Debating the terms of the discussion: "This isn't the right conversation to be having"
Sometimes members of dominant groups will debate definitions and terminology, diverting the conversation and gaining an illusion of control.

Shooting the messenger: "You are not doing this the right way"
When a facilitator-particularly if they are a member of a subdominant group- invites a group to consider issues of privilege, sometimes group members turn on the facilitator. They may criticize their presentation style or otherwise question their credibility.

Feeling compelled to pretend you already know
We sometimes assume that we are "meant to know" all about these sorts of issues. If we feel as if we have to pretend to know more than we do, we will not have real conversations.

"I'm not a part of this privileged group"
We all resist being categorized. We want to be seen as unique individuals, and we should be. However, real advantages accrue based on gender, class, ethnicity, etc. due to a membership we did not consciously choose.

Self-serving accounts
When we are uncomfortable, it is tempting to tell stories that show how we are confronting discrimination, or how we are learning about non-dominant cultures, etc. While we may be doing well, looking at our mistakes or misunderstandings is where we can do more real learning.

Confusing personal prejudice with relations of power and privilege
Some will say, "this conversation doesn't apply to me. I'm not prejudiced." However, individual prejudice reduction does not by itself change institutions. We may be "friendly co-workers," but our own lack of hostility or stereotyping will not change the fact that sexism, classism, and racism shape legal systems, educational institutions, and workplaces. Regardless of our personal likes or dislikes, we who have privilege benefit from those patterns. While any woman, gay person or person of color can be prejudiced, that prejudice is not necessarily supported by broader institutions.

Talking about Inclusion

1. Which of the "barriers" noted above are familiar to you?

2. Under what circumstances have you observed or experienced any of them?

3. What do you think are the most likely barriers you will encounter in showing inter-cultural leadership?

How we Think and Communicate[1]

1. Mental Models / Deep Assumptions

*How do we develop the capacity to reflect on our internal pictures of the world and see how they shape our actions?*

Actions

Beliefs

↑

Conclusions

↑

Assumptions

↑

Affixed meaning

↑

Selected Data & Experience

↑

Real Data & Experience
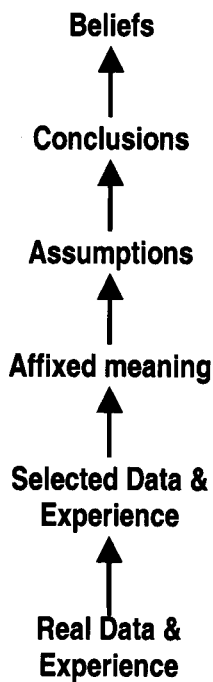
- Mental Models are the images, assumptions, stories and beliefs about the world we carry in our minds.

- Humans need these "mental maps" to navigate through the complex environments of our world.

- Once created, the models quickly become the accepted and *hidden* "Truth".

- *We are so skilled at thinking that we jump up the ladder without knowing it.*

- *The contexts we are in, our assumptions, and our accumulating experience channel how we jump up the ladder.*

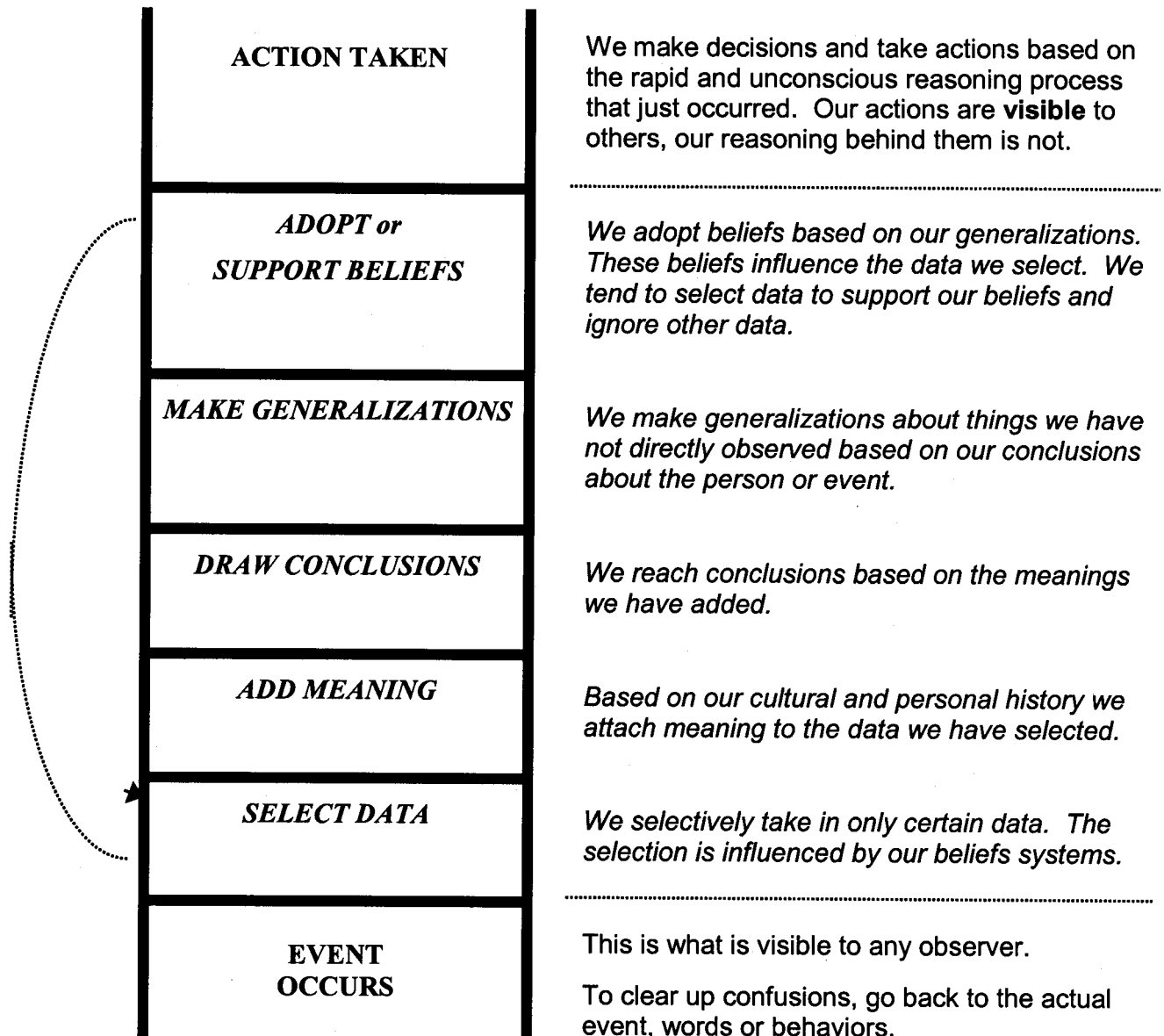- *Our skill at reasoning is both essential and gets us in trouble.*

Assumptions

Conclusions

Affixed Meaning

R

Beliefs

Selected Data & Experience

R

Actions

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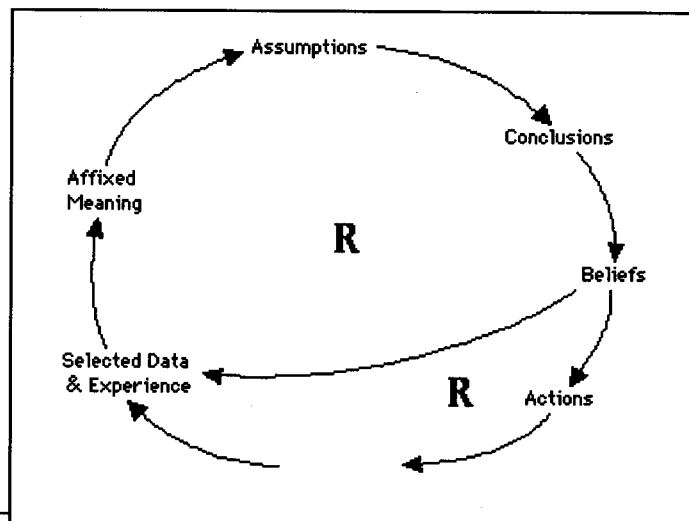
[1] The following is based on the work of Peter Senge, <u>The Fifth Discipline. 1994.</u>

2. *Ladder of Inference*

The Automatic and Unconscious Process of Forming Beliefs

ACTION TAKEN	We make decisions and take actions based on the rapid and unconscious reasoning process that just occurred. Our actions are **visible** to others, our reasoning behind them is not.
ADOPT or SUPPORT BELIEFS	*We adopt beliefs based on our generalizations. These beliefs influence the data we select. We tend to select data to support our beliefs and ignore other data.*
MAKE GENERALIZATIONS	*We make generalizations about things we have not directly observed based on our conclusions about the person or event.*
DRAW CONCLUSIONS	*We reach conclusions based on the meanings we have added.*
ADD MEANING	*Based on our cultural and personal history we attach meaning to the data we have selected.*
SELECT DATA	*We selectively take in only certain data. The selection is influenced by our beliefs systems.*
EVENT OCCURS	This is what is visible to any observer. To clear up confusions, go back to the actual event, words or behaviors.

Based on original work by Chris Argyris, Robert Putnam and Peter Senge

2. Three **Types** of Communication Skills

Assist Us in Understanding Each Other

a) Becoming more aware of our own thinking and reasoning **(reflection);**

b) Making our thinking and reasoning more visible to others **(advocacy);**

c) Inquiring into others' thinking and reasoning **(inquiry).**

In inter-cultural communication, on which will we rely the most?

1. Practice how to listen so others will talk
2. Practice how to talk so others will listen
3. Apply listening and talking skills to inter-cultural communication.

To Facilitate Problem Definition:

Use Reflective Skills...

- *Door Openers*
- *Passive Listening*
- *Acknowledgement Responses*
- *Active Listening*

Use Inquiry Skills...questions to:

- *draw people out*
- *clarify*
- *reorient / stay on track*
- *deal with reticence, undercurrents, tension*
- *[etc.]*

Use Advocacy Skills....

- *Assertion (I-Language based)*
- *Confrontation (I-Language based)*
- *Negotiation (Problem Solving Process based)*

Balancing Inquiry and Advocacy to Improve Inter-cultural Communication

When Inquiring

i.e.,

(Asking questions to help someone else explore *their* perceptions, data, assumptions & conclusions)...

- Find out what data they are operating from

- Help them to describe their own mental models

- Draw out their assumptions and thinking

- Listen with openness and genuine curiosity

When Advocating

i.e.,

(Revealing to others the data *I* am using; owning my interpretations, conclusions, etc)...

- Describe the data you are operating from

- Reveal your thinking and mental models

- Encourage others to question your assumptions

- Reveal where you feel least clear in your thinking