



FOSTERING INCLUSION: WHAT MAKES IT CHALLENGING AND HOW CAN WE DO IT?

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Questions for today

What makes inclusion—**seemingly so simple—also so complicated and difficult** to achieve?

What are some **challenges and paradoxical tensions** that often arise as we strive to create inclusive organizations and groups?

How can we (individually and collectively) **manage those paradoxes** to more effectively foster inclusion?



Community Agreements

Model & practice respect & inclusion

- Be fully present & bring your best
- Listen to understand
- Make room for all to engage and speak (move up, move back). Treat all voices as important.
- Speak for yourself in your own voice ("I ..."). Don't assume agreement

Co-create a "brave space" for learning & dialogue

- Recognize we're all in process
- Lean into discomfort
- Accept others' reality as true for them
- Remember that impact matters – not just intent
- Capture and apply your learning
- Honor confidentiality of individual behavior, stories, participation

Anything else? (What do you need to fully engage, learn, and collaborate?)




Unpacking Inclusion & Its Complexities


- What is inclusion? A multi-level systemic view
- Exploring challenges & tensions of inclusion

Word Cloud


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(in one word)
**What does “inclusion”
mean to you?**




Unpacking DEI




Diversity

- “counting differences”
- presence in a group or organization of people with a variety of identities, backgrounds, styles, and perspectives on a range of dimensions of difference
- feature of a collective (not an individual)




Equity

- creating just outcomes & processes
- fairness in experiences and opportunities (and service), so that these do not unfairly depend on one’s identities, social position, or other extraneous factors



Inclusion

- “making differences count”
- fostering a work culture where everyone--across identities and backgrounds--can do their best and make their full contribution without having to hide or suppress valued aspects of themselves
- necessary to gain the benefits of diversity



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INCLUSION REQUIRES ...

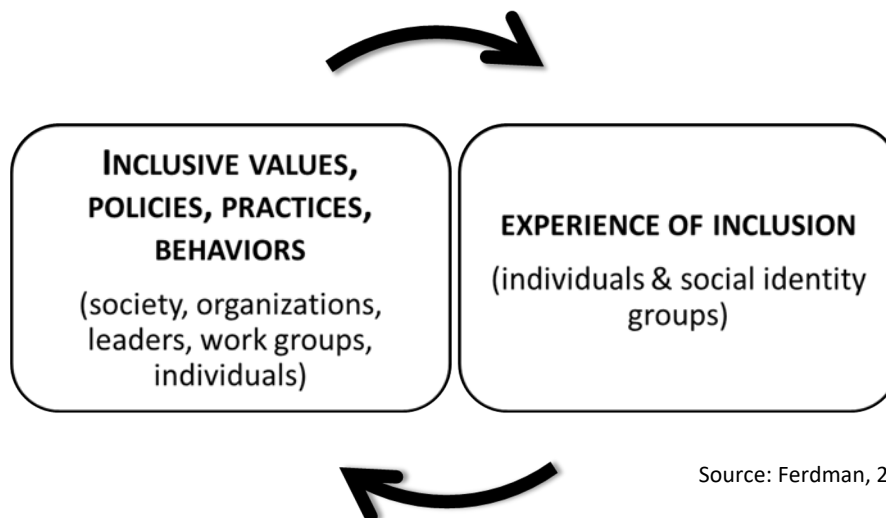
Shifting individual, group, societal interactions to:

- leverage & integrate human differences
- disrupt patterns of social inequality
- foster more equity, participation, belonging—while supporting individual & collective growth & self-determination
- enhance mutual benefits



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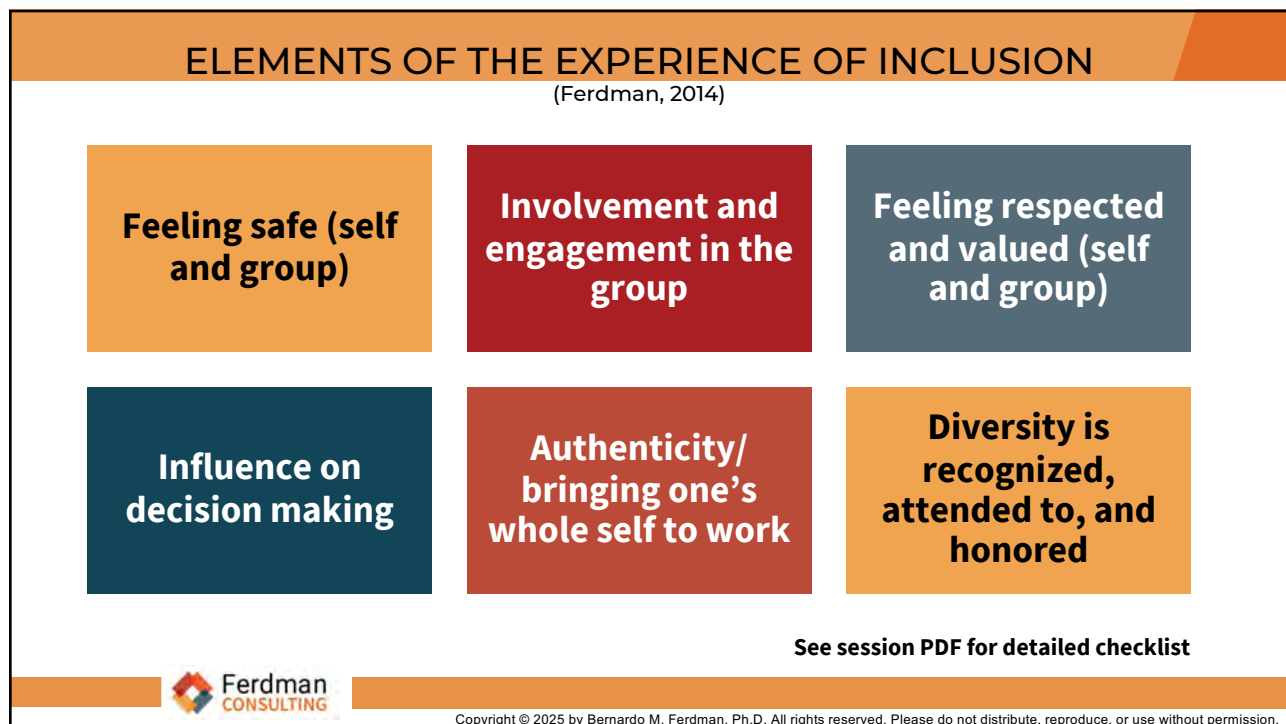
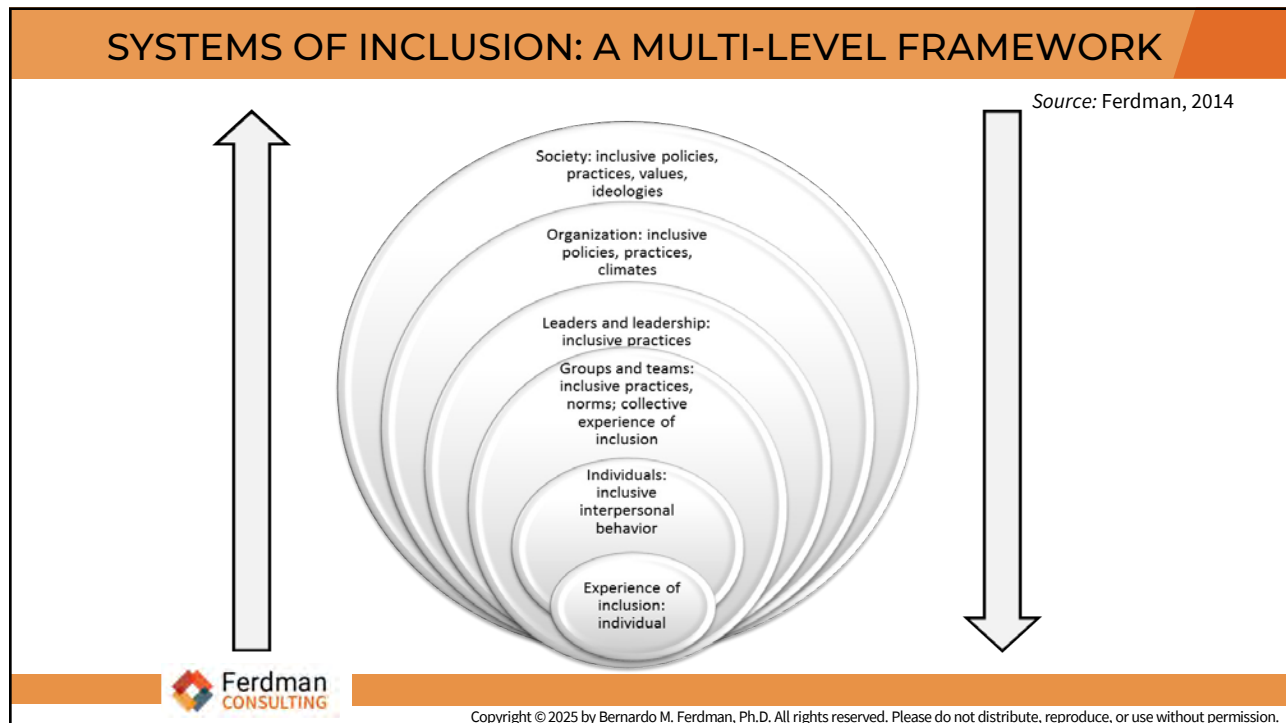
The Practice of Inclusion: A Systemic & Dynamic Process



Source: Ferdman, 2014



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ELEMENTS OF THE EXPERIENCE OF INCLUSION (Ferdman CONSULTING)

Element	Sample questions to ask	☑ Is this true for me?	☑ Is this true for everyone in my workgroup?	☑ Is this true for everyone in my organization?	Notes & observations
Feeling safe (self and group)	<ol style="list-style-type: none"> 1. Do I feel physically and psychologically safe? Do I believe that others who share one or more of my identity groups are also safe from physical and/or psychological harm in the group and in the larger organization? 2. Do I feel secure that I am fully considered a member of the group and organization? Can I move about and act freely (literally and figuratively)? 3. Can I (and others like me) share ideas, opinions, and perspectives—especially when they differ from those of others—without fear of negative repercussions? 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Involvement and engagement in the workgroup	<ol style="list-style-type: none"> 4. Am I treated as a full participant in activities and interactions? Am I—and do I feel like—an insider? Can I (or people like me) succeed here? 5. Do I have access to the information and resources that I need to do my work (and that others have)? 6. Do I enjoy being part of the group and the organization? 7. Can I rely on others in my group and organization (and they on me)? Do I feel like we are part of the same team, even when we disagree? 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Feeling respected and valued (self and group)	<ol style="list-style-type: none"> 8. Am I (and others like me) treated in the ways I (they) would like to be? 9. Do others in the group care about me (and people like me) and treat me (and them) as a valuable and esteemed member(s) of the group and the organization? 10. Am I trusted? Am I cared about? Are people like me trusted and cared about? 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

Element	Sample questions to ask	<input checked="" type="checkbox"/> Is this true for me?	<input checked="" type="checkbox"/> Is this true for everyone in my workgroup?	<input checked="" type="checkbox"/> Is this true for everyone in my organization?	Notes & observations
Influence on decision making	11. Do my ideas and perspectives influence what happens and what decisions are made? 12. Am I listened to when weighing in on substantive issues?	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>	
Authenticity/bringing one's whole self to work	13. Can I be truly myself around others in my group and organization? Do I need to conceal or distort valued parts of my identity, style, or individual characteristics? 14. Can I have genuine conversations with others without needing to involuntarily hide relevant parts of myself? 15. Can I be open, honest, and transparent about my ideas and perspectives? Can I make my contributions in ways that feel authentic and whole?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	
Diversity is recognized, attended to, and honored	16. Am I treated fairly, without discrimination or barriers based on my identities? 17. Can I (and others) be transparent about and proud of my (our) social identities? 18. Can we address differences in ways that lead to mutual learning and growth? 19. Does the group and the organization notice and value diversity of all types?	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	


Questions for Reflection. Review how many and which boxes you checked (or didn't check), as well as your notes.

1. What do you notice? How do you interpret your pattern of responses?
2. What does this tell you about how much and what in what ways you and others experience inclusion in your workgroup and your organization (or elsewhere)?
3. How do you think people in your workgroup &/or organization who are different from you (e.g., in terms of race, culture, gender, gender identity &/or expression, sexual orientation, age, and/or other dimensions of difference) would respond to the same questions? How might you find out?
4. What are your thoughts or perspectives on your responses? What are the implications?
5. How can you use your insights to help build more inclusion in your workgroup and organization?

Inclusive Behavior

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<p>Acknowledge, connect, and engage with others. Greet them authentically. Get to know them. Connect before beginning tasks.</p>	<p>Become comfortable with discomfort. Use discomfort as an opportunity for learning. Speak up and encourage others to do so. Address disagreements; engage difference.</p>
<p>Listen deeply and carefully as an ally, not as a critic. Check for understanding. Be present & focused.</p>	<p>Increase your self-awareness. Understand your biases, assumptions, cultural background, and areas of privilege. Be aware of how your verbal and non-verbal communicate to others.</p>
<p>Engage a broad range of perspectives. Invite new voices. Create space for dissent. Continue to check whether people feel included.</p>	<p>Be willing to learn and be influenced by others. Ask others about what they know, think, and feel, especially when their perspective may be different from yours.</p>
<p>Openly share information and seek transparency. Share your intent and process.</p>	<p>Be respectful and demonstrate fairness. Be aware of your biases and how your verbal and nonverbal behavior communicate respect. Remember that fairness is not equal to sameness.</p>
<p>Be curious. Learn how other people and groups may see and experience the world differently than you or your groups. Test your assumptions.</p>	<p>Foster interdependence & teamwork. Move from an “I” to a “we” mindset. Invite active participation of all team members.</p>





Bringing inclusion to life ...

“Leadership that:

- ◆ promotes and facilitates experiences of inclusion for all, across multiple identities
- ◆ supports the development of workgroups, organizations, communities, and even whole societies where diversity is a source of collective advantage
- ◆ engages and facilitates ideas, contributions, and direction from all types of people
- ◆ advances equity and social justice as focal goals”

(Ferdman, 2021)

Think about: what challenges have you faced in fostering inclusion?



INCLUSIVE BEHAVIORS for Everyone (summary)

1. **Acknowledge, connect, and engage with others.** Greet them. Get to know them.
2. **Listen deeply and carefully,** as an ally not a critic. Check for understanding.
3. **Engage a broad range of perspectives.** Invite new voices. Provide space for dissent.
4. **Openly share information.** Share your intent and process.
5. **Be curious.** Learn how other people and groups may see and experience the world differently than you and your groups.
6. **Become comfortable with discomfort.** Use discomfort as an opportunity for learning.
7. **Increase your self-awareness.** Understand your biases, assumptions, cultural background and areas of privilege. Be aware of how your verbal and nonverbal behavior communicate to others.
8. **Be willing to learn and be influenced by others.** Ask others about what they know, think, and feel, especially when their perspective may be different from yours.
9. **Be respectful and demonstrate fairness.**
10. **Foster interdependence & teamwork.** Move from an “I” to a “we” mindset.

Inclusive Behaviors¹

For Everyone: This is a list of behaviors that everyone can exhibit to foster inclusion for themselves and others around them. (All of these behaviors should be grounded in an understanding that we are similar and different from others in group-based identities as well as in individual ways.)

1. **Acknowledge, connect, and engage with others.** *Being present in the moment demonstrates respect.*
 - Greet people (in culturally appropriate ways).
 - Take time to get to know and connect with people before beginning tasks.
2. **Listen deeply and carefully.** *When we listen to others carefully, we really hear the other person, demonstrate interest, and make it more likely that we are creating safety and connection and building the possibility of dialogue and learning.*
 - Listen more as an ally than as a skeptic or critic.
 - Be present and focused. Avoid distraction.
 - Bring cultural understanding to your interactions, noting that aspects of communication (both verbal and non-verbal) vary from person to person and culture to culture. Attend to the message more than to the style of delivery.
 - Listen for understanding before you judge or try to decide whether you agree or disagree. Ask questions for learning and clarification; check for clarity and assumptions.
3. **Engage a broad range of perspectives.** *Multiple points of view enhance the possibility of better decision-making and problem-solving and increase people's feeling of engagement and belonging.*
 - Ask who else needs to be part of the conversation or process.
 - Actively invite new voices and different and alternative perspectives. Provide room for dissenting voices.
 - Have the courage to say what you believe needs to be said.
 - Continue to check whether people feel included.
 - When speaking with others, connect your comments to what the person who spoke before you said.
4. **Openly share information; seek clarity and openness.** *To build trust people must have the information needed to make good decisions. The more open and transparent the process and the information, the more people can add value.*
 - Communicate relevant information.
 - Share your intent and process.
5. **Be curious.** *When we are curious (rather than closed or judging) we can learn more about others' points of view.*
 - Get to know people, especially those who are different from you.
 - Identify, share, and test your assumptions.

¹ This document is an adaptation of *Inclusive Behaviors and Practices* (Version 1.1, April 2009) by B. M. Ferdman, J. H. Katz, E. Letchinger, and C. Thompson (created for The Institute for Inclusion and presented in Ferdman, B. M., Katz, J. H., Letchinger, E., & Thompson, C., 2009, March 9, *Inclusive behaviors and practices: Report of the Institute for Inclusion Behavior Task Force*. Presentation at the Institute for Inclusion 4th Conference, Arlington, VA).

- Learn how other people and groups may see and experience the world differently than you and your groups.
 - When someone expresses a different perspective, ask or try to learn why the person holds that perspective, rather than arguing or trying to prove them wrong.
6. **Become comfortable with discomfort.** *Leaning into discomfort enables people to take risks and to speak the truth. It takes courage to be willing to speak up, and some discomfort in the process may be critical to enable more authenticity and connection.*
- Find and use your voice (even if it is different from others).
 - Encourage others to speak up and use their voice.
 - Put yourself in new situations (and make old situations new).
 - Use discomfort as an opportunity for learning.
 - Openly address disagreements—don't avoid differences, engage them.
 - Don't expect perfection. Be forgiving of ourselves, and of others.
7. **Increase your self-awareness.** *The more we understand ourselves the more we can partner effectively with others. A key to knowing ourselves is to be involved in a continuous process of self-learning and increased awareness of self.*
- Continue to educate yourself; developing self-awareness is a continuous and never-ending process.
 - Understand your biases and assumptions.
 - Learn about your own cultural background and influences.
 - Understand your areas of privilege.
 - Be culturally sensitive/aware; some concepts don't translate well across languages/cultures.
 - Observe and understand the effects and impact of your behavior, language, etc.
 - Solicit feedback.
 - Be clear about how you are similar to and different from others.
 - Recognize that all of us have complex identities. Educate yourself regarding how your various identities relate to, enrich, and influence each other (for example, how does being a parent relate to being a man or a Latino?).
8. **Be willing to learn and be influenced by others.** *No one person has all the answers. The more open we are to learning and being influenced by others the more possibility there is for true connection and inclusion.*
- Be clear about your values and beliefs, and be willing to examine them based on new information.
 - Ask others about what they know, think, and feel, especially when their perspective may be different from yours.
 - Reach out to others.
 - Identify new people from whom to learn.
 - Recognize you may not always have the right or only answer. Remain humble and flexible.
9. **Be respectful and demonstrate fairness.** *One of the keys to inclusion is that people feel that they are valued and treated with dignity, respect, and fairness.*
- Be aware of your biases and how your verbal and nonverbal behavior communicate respect to others.
 - Fairness does not equal sameness—be willing to be fair and equitable with each person without necessarily applying strict rules across the board regardless of specific circumstances.

- Speak up when others are excluded.
- Be aware of your tone of voice and its effects.
- Honor commitments and do what you say you will do.
- Respond in a timely way to others' requests.
- Be brave enough to give honest feedback to others.

10. Foster interdependence & teamwork. *Understanding the role that each individual plays to accomplishing team success is critical to inclusion. Being mindful of the interdependence of all members is a key dimension of inclusion.*

- Move from an “I” to a “we” mindset.
- Focus on shared outcomes and shared success.
- Recognize who you rely on to achieve tasks and who relies on you.
- Invite active participation of all team members.
- Check in with all team members to assure they feel included.
- Continue to solicit and give feedback on the degree to which each person feels valued and is adding value to accomplishing goals and objectives.

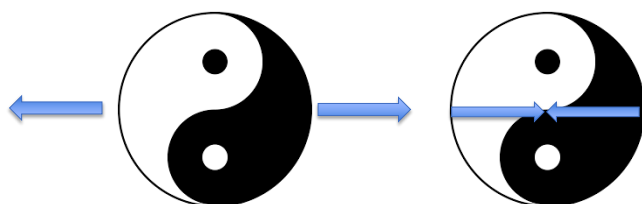
Exploring the Paradoxes of Inclusion

- Overview
- Self-expression and identity
- Boundaries & norms
- Safety & comfort

Dilemmas & Paradoxes

Paradox: a situation, person, or thing that combines seemingly contradictory features or qualities (which together may reveal a deeper truth or insight)

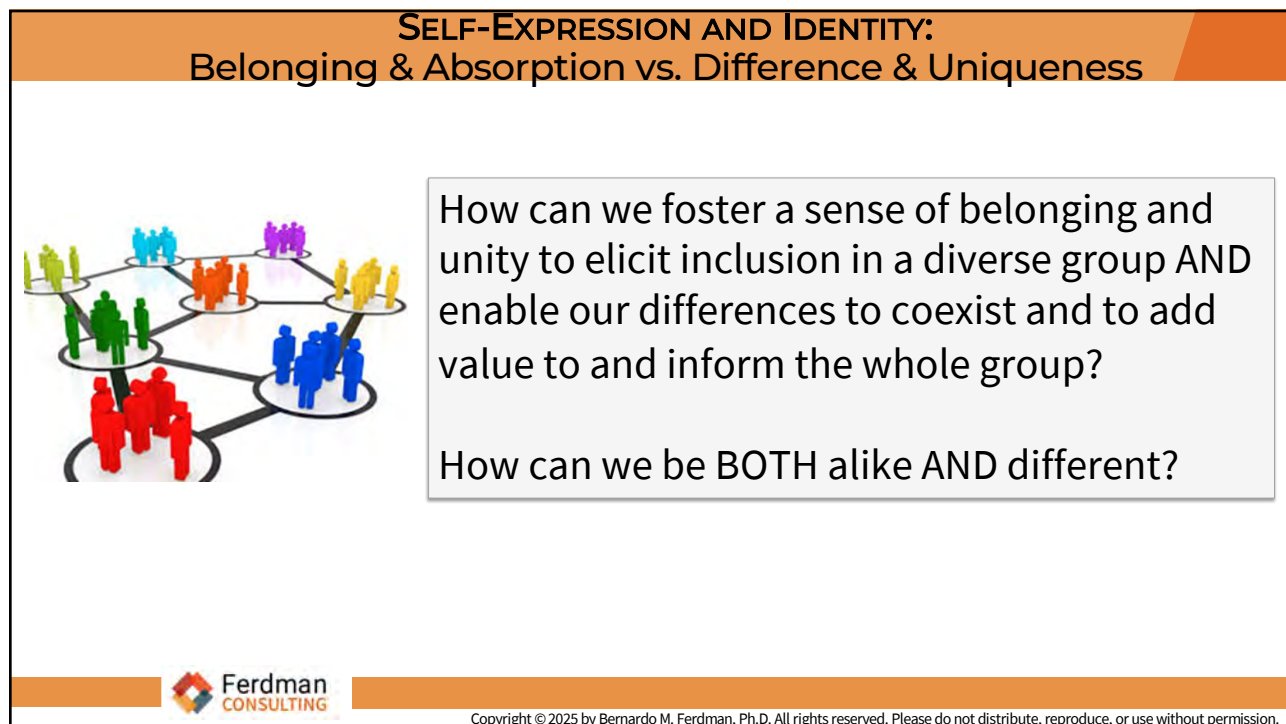
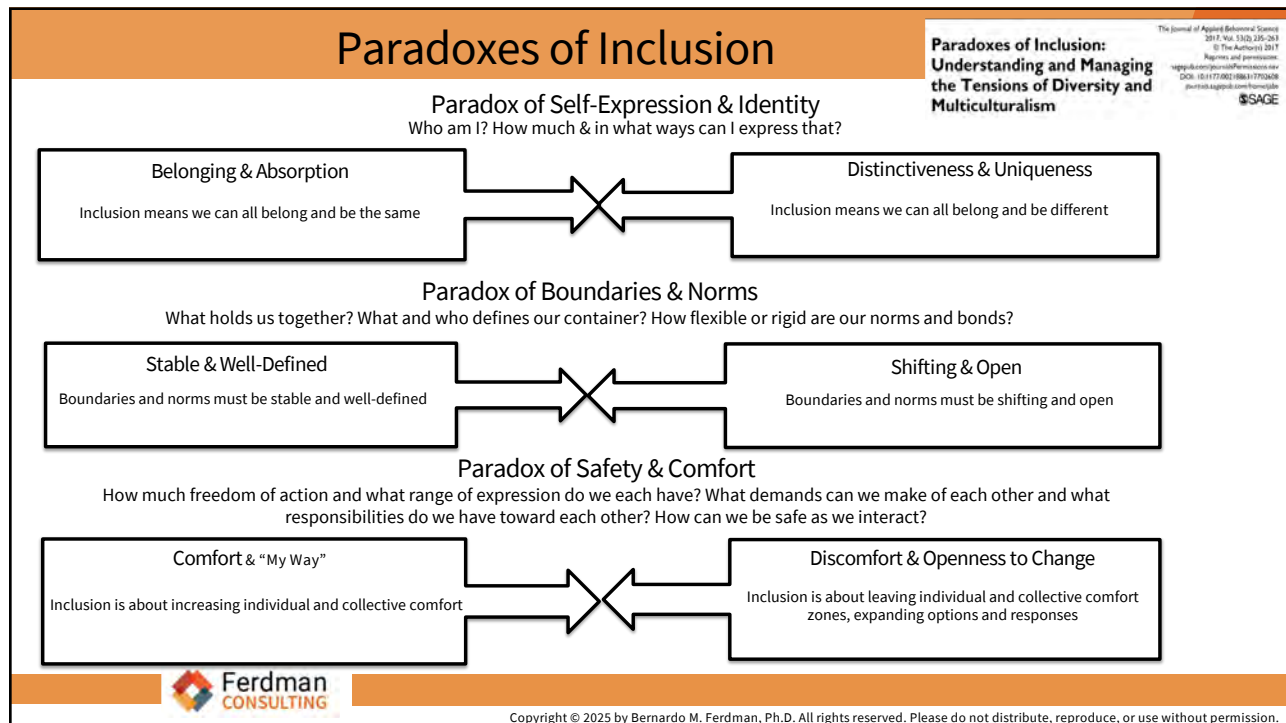
Dilemma: a difficult choice between equally desirable or undesirable alternatives.



A or B?

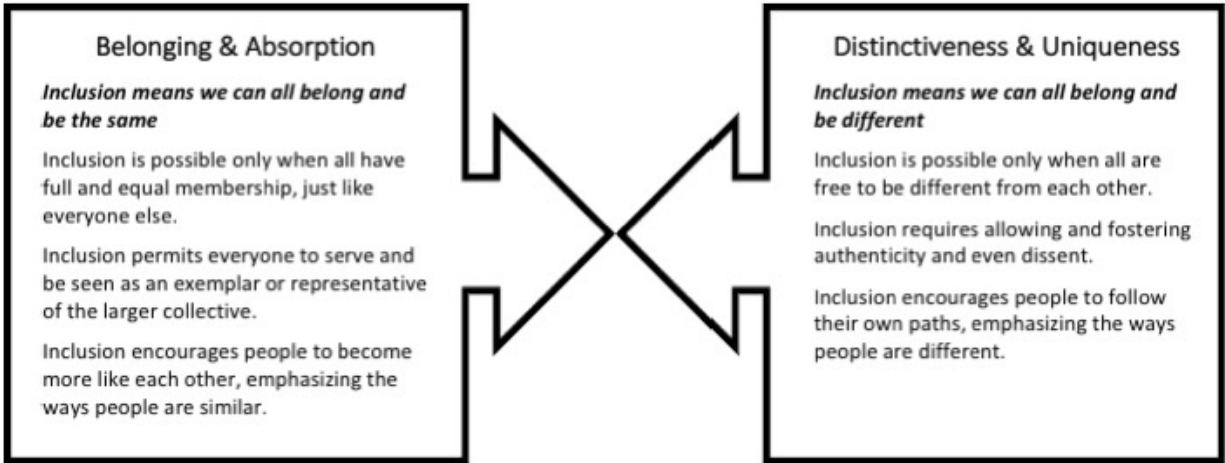


What diversity or inclusion tensions, dilemmas, and/or paradoxes have you observed or experienced?



Paradox of Self-Expression & Identity

Who am I? How much & in what ways can I express that?



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Examples of Polarizing Reactions

Self-Expression & Identity



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Self-Expression & Identity: Suggestions for Managing the Paradox

1. Avoid polarizing between the two sides: Understand that identifying with the larger collective allows for distinctiveness, and that affirming uniqueness strengthens a sense of authentic belonging to the larger group.
2. Address *both* collective identity and individual uniqueness.
3. Recognize that “special” interest and affinity groups serve the whole by strengthening its parts.
4. Highlight how we are all joined together in our difference and uniqueness. (We are all different.)
5. Develop and share multi-faceted accounts of collective identity, applicable to all, and at the same time recognize and address specific histories, needs, and aspirations.
6. Accept and embrace the reality of intergroup processes and perspectives, even while emphasizing individuality.



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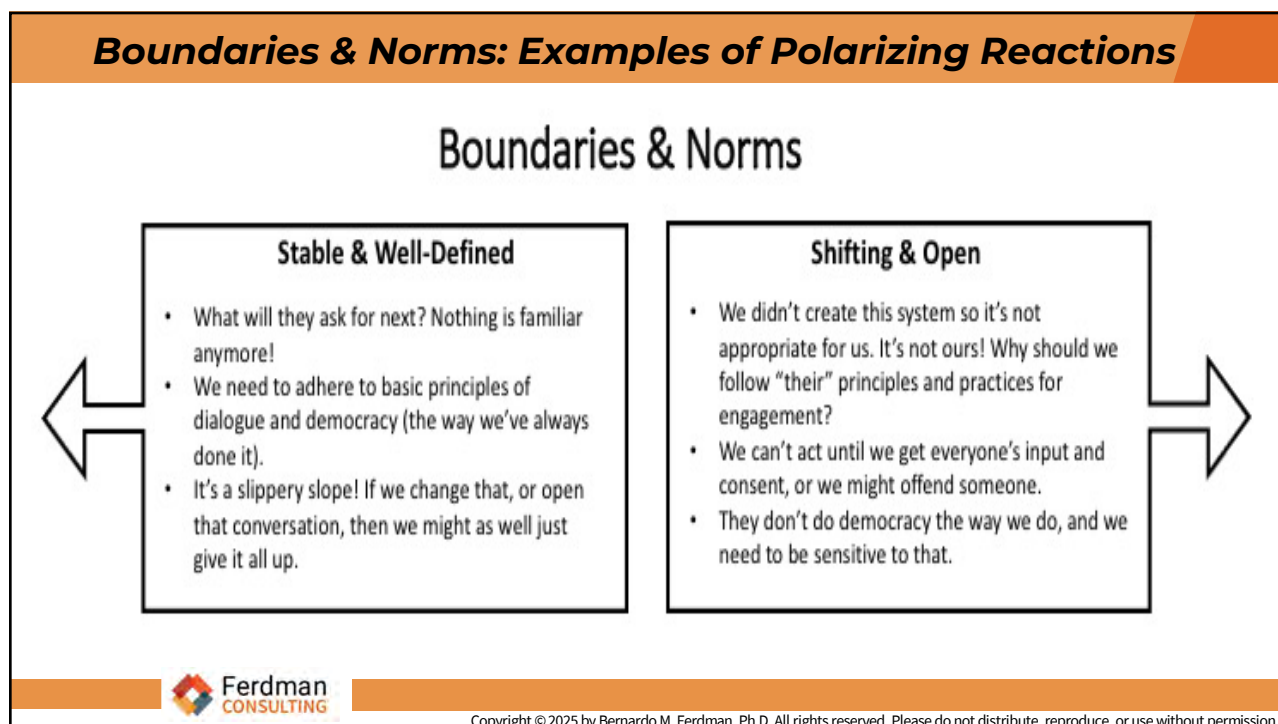
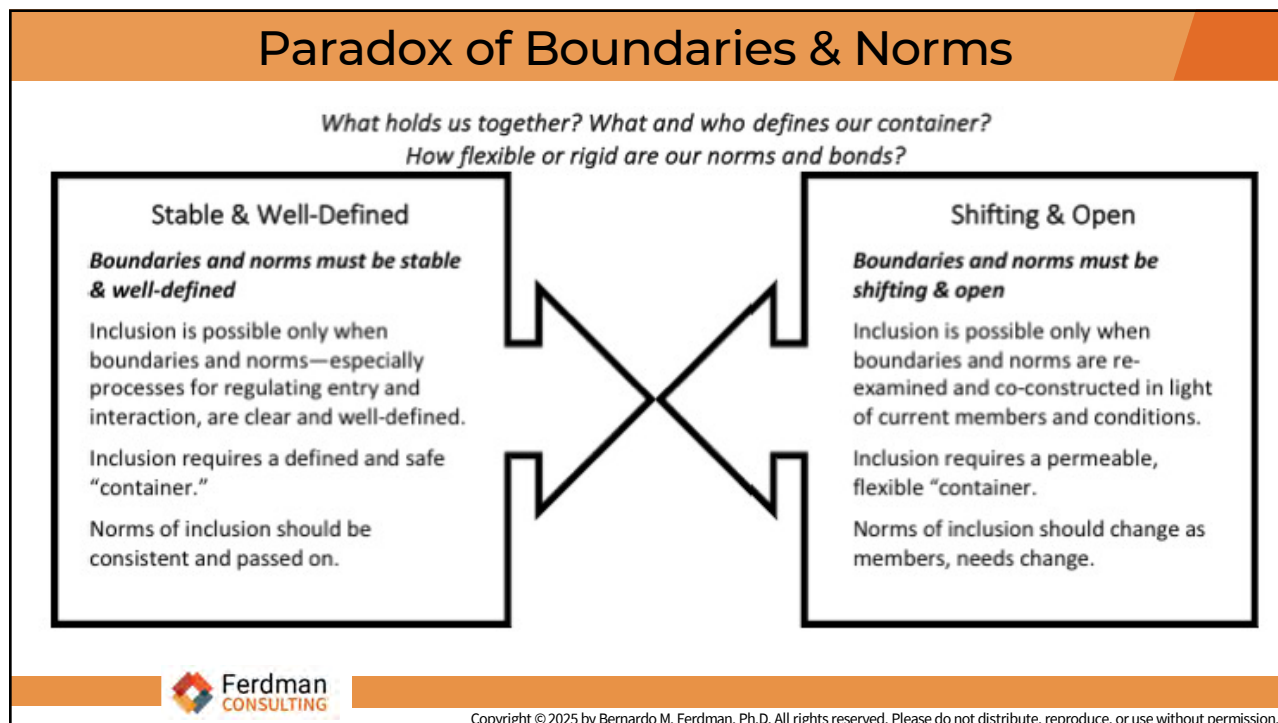
BOUNDARIES AND NORMS Stable & Well-defined vs. Shifting & Open

How do we clearly and effectively define collective boundaries and norms (especially regarding inclusion) without losing the benefits of expansion, challenge, and pressure that can help make our norms more adaptive to and representative of changing membership and changing conditions?

How can we pay attention to and address everyone's needs and views AND still do work (especially as membership shifts)?



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Boundaries & Norms: Suggestions for Managing the Paradox

1. Recognize and own the paradox, in part, by noting and acknowledging our own internal ambivalence about boundaries and norms.
2. Engage across differences in the spirit of learning and possibility. Expect to engage across different approaches for engaging across differences.
3. Understand that inclusion implies both loosening boundaries and simultaneously enhancing them: for "new" or "different" people to feel included, the overall category must be clear yet, at the same time, must be redefined.
4. Understand and communicate that inclusion does not mean the absence of limits, that "anything goes," or that there is an absolute possibility to question everything.
5. Co-create norms and processes for inclusion— with clear parameters—and hold each other accountable.
6. Develop and use rules for dissent and rule-breaking.
7. Create a collective definition of boundary based on shared values while holding spaces for divergent values.
8. Work with those present, while making space for newcomers and their possible dissent.



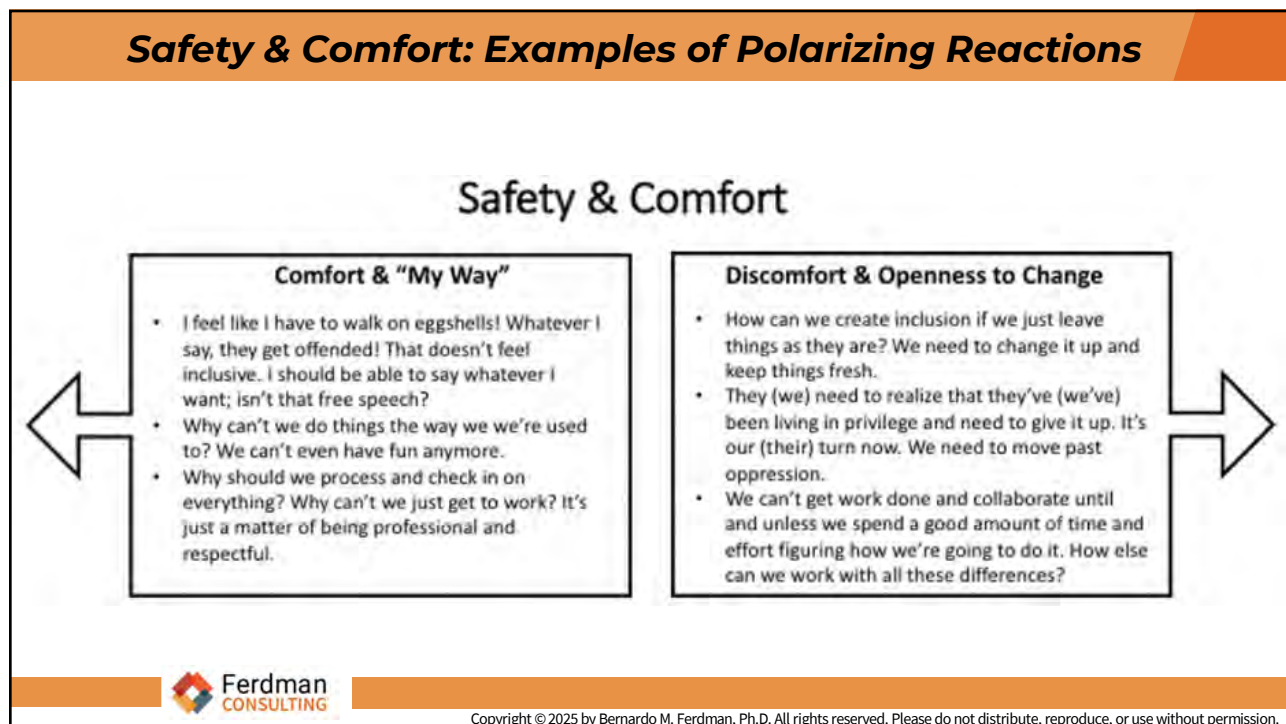
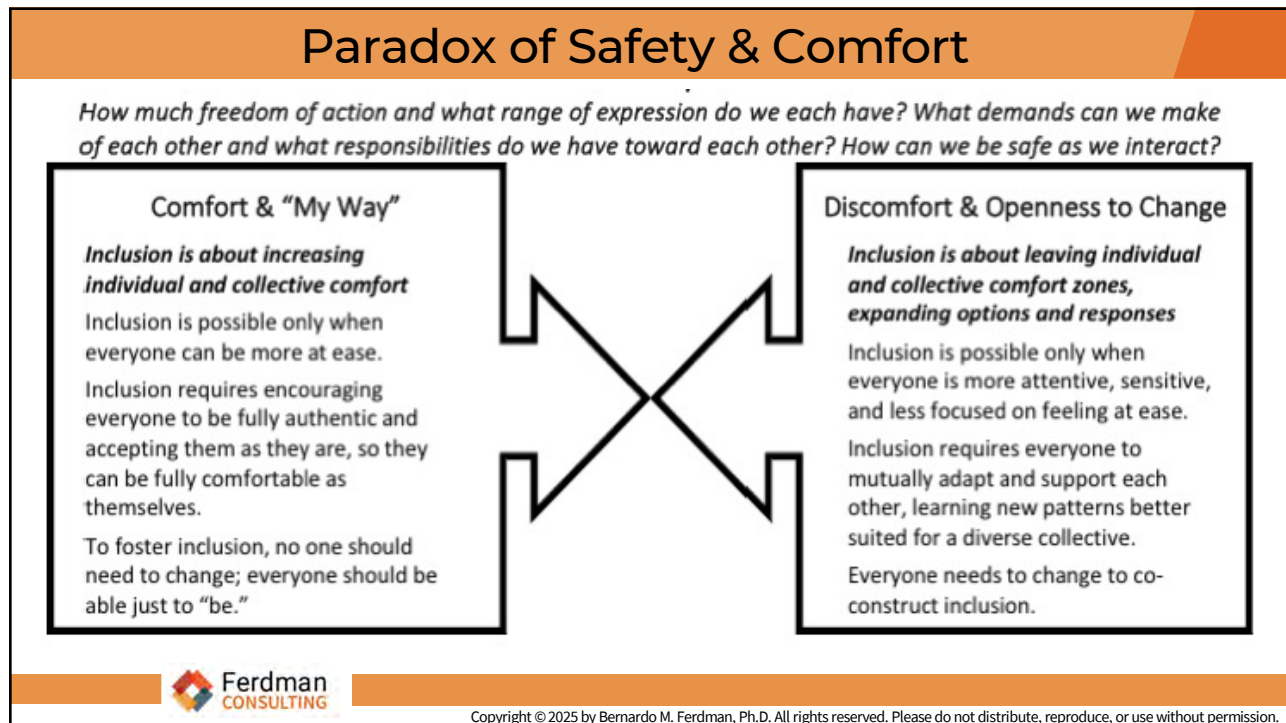
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PROCESS GOALS Comfort vs. Discomfort

- How do we experience, balance, and manage the inherent tension between the discomfort of differences and creation and maintenance of a “comfortable” environment?
- How can we become comfortable with discomfort?



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Safety & Comfort: Suggestions for Managing the Paradox

1. Understand and accept that comfort always has limits, and that self-expression and self-determination must happen in a collective context of mutual understanding and collaboration.
2. Engage in ongoing dialogue and learning, be willing to learn new ways to do things and to engage with others and recognize that growth and learning are an essential part of being human. Normalize discomfort as part of growth.
3. Remember that becoming more oneself requires growing and learning, especially from those who are very different or whom we do not understand.
4. Promote and accept dissent, in the context of improving and perfecting the society and system.
5. Learn to be able to be uncomfortable, and to understand that those whom we do not understand are important.



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Closing Reflection

Join at
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I learned

I will...

I hope ...



THANK YOU!

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inclusiveleader.com



Book excerpt:
bit.ly/inclusionfulcrumchapter



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Bernardo M. Ferdman, Ph.D.

Specializing in bringing inclusion to life in diverse organizations, developing inclusive leadership, and transforming workplace tensions into opportunities for inclusive strength.

Bernardo is a globally recognized leadership and organization development consultant, thought leader, and executive coach with 40 years of experience helping organizations transform diversity into a strategic advantage and inclusion into a tangible, lived experience. He is passionate about creating inclusive environments where everyone can thrive and accomplish goals effectively, productively, and authentically.

Bernardo, principal of [Ferdman Consulting](https://bit.ly/Ferdmanpubs), has dedicated his career to helping organizations leverage diversity to achieve better business results and become places where everyone can belong and contribute. He partners with leaders, teams, and organizations to build inclusive mindsets, behaviors, and strategies that unleash individual and collective potential and talent. As a coach, consultant, speaker, and facilitator, Bernardo works to empower leaders to create inclusive cultures, engage across differences and manage conflict authentically and effectively, and drive meaningful, lasting change. His approach combines executive coaching, organizational and team assessments (including with his [Workplace Inclusion Inventory™](https://bit.ly/Ferdmanpubs)), leadership development, strategic planning, facilitation of dialogues and learning sessions, and skill-building for inclusion.

A CCE Board Certified Coach and native Spanish speaker with extensive international experience, Bernardo has worked with businesses, NGOs, non-profits, government agencies, and educational institutions across the United States and in Europe, Latin America, and Asia. He has coached leaders in corporate, non-profit, and other settings, helping them to achieve their goals and to develop self-awareness, openness to feedback, and skills needed to collaborate effectively and productively. He has delivered hundreds of workshops and learning sessions that emphasize the practice and challenges of inclusion, inclusive leadership, navigating workplaces differences, authentically engaging in conflict, and bringing one's whole self to work. and he has developed programs and taught in many executive education settings.

Bernardo served as president of the Diversity Collegium, is a member of the Inclusion Allies Coalition and an expert panelist for the *Global Diversity, Equity, and Inclusion Benchmarks*, and was a network associate with AmericaSpeaks as well as the 2020 H. Smith Richardson Jr. Visiting Fellow at the Center for Creative Leadership. As a scholar-practitioner and former university professor (1986-2017), Bernardo has published extensively on topics such as diversity and inclusion, organization development, cross-cultural management/leadership, cultural identity, and Latinos/as in the workplace. His books, *Inclusive Leadership: Transforming Diverse Lives, Workplaces, and Societies* (Routledge, 2021) and *Diversity at Work: The Practice of Inclusion* (Wiley, 2014) are widely recognized as essential resources providing state-of-the-art, research-based understanding of inclusion and how to systematically create and foster it and navigate its challenges. Bernardo's contributions to the field have earned numerous accolades, including the Society of Consulting Psychology's Award for Excellence in Diversity and Inclusion Consulting, the Janet Chusmir Distinguished Service Award (AOM Gender and Diversity in Organizations Division), the Trailblazer Award (Ph.D. Project Management Doctoral Students Association), and the Gordon Allport Intergroup Relations Prize (SPSSI).

Clients (selected):

Energy, Utilities, Environmental Services: Central Contra Costa Sanitary District, Sempra Energy, West Yost, Xylem

Financial Services: Alliance Bernstein, Bank of America; BlackRock, Chartwell Financial Advisory, MetLife, UBS, Wells-Fargo, World Bank

Healthcare: City of Hope, Planned Parenthood (PPFA, PPGT, PPLA, PP Mar Monte, PPMI, PPPSW)

Manufacturing & Consumer Goods: Alcoa World Alumina, Alumina Española S.A., Solar Turbines, Sumitomo Rubber North America, The Toro Company

Pharmaceuticals: Eli Lilly and Company, Pfizer, Vertex

Retail & Consumer-Focused Orgs: Amazon, Brown-Forman, Ikea Group AB,

Technology: CircleCI, Intel Corporation, Sauce Labs

Telecommunications: Tracfone Wireless, Verizon Communications

Other: BrandActive, General Atomics, Hearken, Mitchell Genex Coventry, US Foods

NGOs & Global Orgs: Inter-American Development Bank, Int'l Water Management Institute, Island Conservation

Gov't: & Public Sector: CalEPA Dept. of Toxic Substances Control, Calif. State Water Resources Control Board, City of Berkeley, City of San Diego, County of San Diego, San Diego Workforce Partnership, San Francisco Bay Conservation & Dev't Commission, U.S. Air Force JAG Corps, U.S. Defense Security Service, U.S. Department of Homeland Security

Education & Academic Institutions: CSU San Marcos, CatalystEd, Community Colleges of California, Levine Music, National University System, San Diego Community College D, Univ. of Pittsburgh Swanson School of Engineering

Non-profits, Foundations, & Associations: American Psychological Assoc., California Assoc. of Food Banks, Catalyst Inc., Center for Creative Leadership, Democracy Fund; Goodwill Industries International, Institute for Well-Being in Law, Lumina Foundation & Santa Ana Partnership, NAMIC, Nat'l College Attainment Network, Nat'l Institute for Civil Discourse, Pivotal Ventures, The Moth

Executive Education: Ascent-Leading Multicultural Women to the Top, Dartmouth Tuck, UCLA Anderson, UCSD Rady, United Nations System Staff College

Education & Affiliations:

- Ph.D., M.Phil., & M.S. in Psychology, Yale University; A.B., Princeton University
- CCE Board Certified Coach (Executive/Corporate/Business/Leadership)
- Distinguished Professor Emeritus, California School of Professional Psychology, Alliant International University
- President, Diversity Collegium (2019); Past co-chair, Webinars Committee, Inclusion Allies Coalition; Expert Panelist, *Global Diversity, Equity, & Inclusion Benchmarks*
- Faculty, UCLA Anderson Executive Education; UN System Staff College
- Past President, Interamerican Society of Psychology

- Past Division Chair, Gender and Diversity in Organizations Division; Past Chair, Diversity & Inclusion Theme Committee, Academy of Management
- Past President, Interamerican Society of Psychology
- Charter Fellow, International Academy for Intercultural Research; Fellow, American Psychological Association (including five divisions: SIOP, SCP, SPSSI, SPSCER, & Int'l); Fellow, Society for Industrial and Organizational Psychology (former Editorial Board Member, Prof. Practice Book Series) & Society for Consulting Psychology

Publications: see <https://bit.ly/Ferdmanpubs>