

Name and Department (optional): _____

What stage is the City of Madison? _____

Turn to that stage’s checklist, and begin by marking the “Done” box for all activities the City of Madison has already implemented in that stage. For those you do not check, which are the most important for Management Team to focus on moving forward? Indicate the top three priorities in the gray column. *Tip: If you cannot check “done” on any line of the checklist for a certain stage, you may want to go back to a previous stage to make sure you chose the correct stage.*

Stage 1: The Exclusionary Organization

Strategic Actions: The goal is to assess the current state, increase safety, decrease exclusionary and discriminatory practices, and make environment far less dangerous for the physical and psychological well being of staff and managers.

Top 3	Done	Strategy:
		1. Engage in coalition building: develop relationships with managers, employees, and community members from all identities.
		2. Build a shared understanding of the current exclusionary practices and oppressive behaviors
		3. Identify the negative impact of the status quo on members of the workplace community and the reputation of the institution
		4. Collectively strategize next steps
		5. Identify the self-interest of the top leaders to make changes in status quo
		6. Gather data about impact of status quo on items of self-interest to top leaders
		7. Develop ways to “put a face” on the negative impact of the status quo and to make the offenses well known
		8. Identify any internal and external demands, “levers for change” to shift the status quo (i.e., recent bias incidents, current or potential law suits, drop in enrollment and retention, state legislators, regional corporations, local communities, national priorities)
		9. Increase visibility of leaders reinforcing their commitment to create a safe, inclusive environment
		10. Identify and communicate clear expectations and boundaries for appropriate behavior and clear responses for inappropriate behavior
		11. Create structures to ensure all staff understand the rules for expected behavior and the consequences of exclusionary actions, negligence, etc.
		12. Ensure that all leaders and managers participate in required related trainings, including sexual harassment training, grievance procedures, etc.
		13. Continually monitor and report on efforts and outcomes to create greater safety for all groups
		14. Gather data from peer institutions: best practices and benchmarks

Stage 2: “The Club”

Strategic Actions: Continue to eliminate discrimination and harassment and institutionalize policies and practices to increase the safety of all community members. Begin to assess the current state and create the infrastructure to implement strategies to (a) create an inclusive environment and (b) successfully recruit, retain and promote managers and staff who demonstrate the skills and competencies to effectively teach and provide services to an increasingly diverse population. Increase visibility of top leader commitment.

Top 3	Done	Strategy:
		1. Continue and enhance work on all of the Strategic Actions in Stage 1, Exclusionary Organization.
		2. Create an Inclusion Change Team/Equity Team: Secure top leader support to form an Institutional Inclusion Change Team/Equity Team
		3. Form the Change Team/Equity Team: Ensure that the membership represents a diagonal slice of the workforce.
		4. Adjust members’ work load, as needed, to allow their full participation.
		5. Team development of Inclusion Change Team/Equity Team. Accelerate the skill and group development of the Change Team/Equity Team through retreats, in-depth diversity/inclusion training, and authentic dialogue among members.
		6. Initial Assessment: Conduct a comprehensive Cultural Audit (including, staff, committees, managers) including climate assessment, data on recruitment, retention, promotion, tenure, development and career path, performance ratings, demographics by job position and salary, grievances and discrimination complaints, assignments of advancement opportunities, infusion of diversity into job position skills/knowledge/abilities and benchmarks of job interviews, etc.
		7. Feedback Session: Compile the data and conduct a Feedback Session with top leaders to diagnose results of Cultural Audit and discuss ways to ameliorate the exclusion and inequities that exist.
		8. Examples of actions that could result from the Feedback Session: Assess the current policies, processes, and practices and identify “Discretionary Points” where bias could enter these processes and create negative differential treatment of staff.
		9. Focus on influencing future recruiting efforts to hire leaders and mid-level managers with a demonstrated commitment and track record for creating inclusive, racially equitable environments.
		10. Revise, as needed, organizational mission, values statement, and Human Resources policies to address issues of inclusion and social justice directly and comprehensively.
		11. Increase division/department diversity awareness programs and workshops.
		12. Create a Mentoring Program for staff from subordinated groups. Match them with leaders, and managers across difference.
		13. Increase resources for programs and services that promote the onboarding, retention and success of subordinated groups, including support groups, affinity groups, culturally relevant assistance program services, multicultural leader retreats, etc.
		14. Leadership Team Development: Work with top leaders (mayor’s office/council) to increase their capacity to demonstrate effective leadership of this Equity Initiative.
		15. Continue building coalitions
		16. Form relationships with policy makers, community members, and other influential figures
		17. Build coalitions among multicultural employee groups
		18. Continue to gather relevant data that supports organizational change efforts

Stage 3: The Compliance Organization

Strategic Actions: Build and implement a data-based Strategic Plan; increase the numbers of staff and managers from subordinated groups; create structures to ensure they are welcomed and embraced.

Top 3	Done	Strategy:
		1. Continue to collect, analyze, and compare comprehensive data on climate, recruitment, retention, promotions, costs of status quo, etc.
		2. Deepen cultural competencies of Institutional Inclusion Change Team/Equity Team to include MCOB theory, organizational change models, strategies to engage resistance, etc.
		3. Management team and Institutional Inclusion Change Team/Equity Team develop a long-term Inclusion Strategic Plan; Measures of Success identified and communicated widely
		4. Create meaningful dialogue among management team and members of subordinated groups and key allies
		5. Create a "Reverse Mentoring" Program for management team and selected other key leaders. Match leaders with a subordinated group member with the goal of increasing cultural competencies of leaders
		6. Continue development and training of Management Team to increase depth of commitment and consistent demonstration of cultural competencies
		7. Clarify and communicate clear expectations for quality of services and quality of experience for all employees across group identity
		8. Identify core cultural competencies expected of all staff and managers
		9. Revise performance system to hold people accountable for demonstrating these cultural competencies
		10. Implement a comprehensive initiative to increase the cultural competence of all administrators and staff
		11. Integrate cultural competencies into Human Resources and all other training sessions
		12. Form Inclusion Teams/Equity Teams in all departments/divisions that are linked to the city-wide Team
		13. Examine and revise policies, practices, and structures to include the goals of inclusion and cultural competencies expected of all managers and staff (i.e., job descriptions, department/division mission statements, decision-making processes, protocol to respond to grievances, hate crimes and sexual assaults, performance evaluations, reward structures, marketing materials, recruiting practices, hiring practices, promotional processes, career development processes, etc.)
		14. Require Equity Plans from all leaders and managers that identify measurable strategies to meet goals
		15. Implement a Mentoring Program for all staff
		16. Create meaningful opportunities for members of subordinated groups to meet
		17. Create developmental opportunities for members of dominant groups to examine privilege, dominant culture, and explore their role in partnering to create change
		18. Require all interview panel members to participate in an equity/implicit bias workshop designed to eliminate discriminatory practices and increase the hiring of candidates who demonstrate core cultural competencies
		19. Examine and revise, as needed, all on-boarding and orientation/training programs of staff, to address issues of inclusion
		20. Stay current on efforts of peer institutions and other organizations

Stage 4: The Affirming Organization

Strategic Actions: Continue to enhance the safety of all groups, and increase the numbers of subordinated group members. Increase attention to access and strategies to ensure success for all. Increase skill and competencies of managers and employees to create programs, services, and processes to increase engagement and success of increasingly diverse population.

Top 3	Done	Strategy:
		1. Annual review by mayor of Equity Plans from all leaders and managers
		2. Best practices shared across institution
		3. Reward system and processes developed and implemented for champions and areas that make significant progress towards Equity Goals
		4. Management team and mayor review institutional-wide reports on recruitment, retention, development, career path, and promotions on a regular basis: i.e. every 6 months
		5. 6-month reviews by top leaders of Equity Plans from managers in their areas
		6. Train leaders and managers to identify the “discretionary points” in policies, practices, and unwritten rules where bias and prejudice could result in negative differential impact and exclusion
		7. Develop the internal capacity of select staff to effectively use a “Equity Lens” in day-to-day activities
		8. Develop a group of Internal Trainers/Coaches who can facilitate diversity awareness and skill sessions
		9. Conduct Cultural Audits for individual departments and divisions
		10. Conduct Feedback Sessions with leaders, managers, and staff to diagnose data from Cultural Audits of their area
		11. Charge existing or develop a Task Force to work directly with leader to address issues raised in department/division Cultural Audits
		12. Train all staff and managers how to integrate diversity and inclusion into their day-to-day activities
		13. Create structures that reward managers who enhance operations to meet the learning needs of diverse community members, and integrate cultural competencies and social justice skills into their work
		14. Sponsor Dialogue Groups to facilitate authentic dialogue and understanding among members of dominant and subordinated groups
		15. Stay current on efforts of peer institutions and other organizations

Stage 5: The Redefining Organization

Strategic Actions: Engage the entire community in a new kind of open dialogue about what it means to create and maintain the new, inclusive organization. To continually innovate, try new strategies, assess impact, and redesign programs, policies, and practices as needed.

Top 3	Done	Strategy:
		1. New norms of the Inclusive Organization are communicated widely
		2. Revise performance and reward systems, orientation/on-boarding, and development/training programs to highlight key skills and competencies that support the new norms and inclusive culture
		3. Annual analysis and revision of all policies, practices and procedures to eliminate any unintended differential impact and exclusion
		4. Create structures to ensure that a "Equity Lens" is actively engaged in all planning and decision-making processes across the institution
		5. Continue to influence all recruiting efforts of leaders and managers to ensure they demonstrate commitment and success in creating and maintaining inclusive environments for all constituents
		6. Enhance community outreach efforts and partnership initiatives

Stage 6: The Multicultural (Fully equitable) Organization

Strategic Actions: Continually reassess current state and organizational needs, and change as needed to ensure social justice.

Top 3	Done	Strategy:
		1. Implement Continuous Improvement strategies
		2. Initiate regional efforts to share best practices, increase inclusion in all regional institutions
		3. Partner with local and state government leaders
		4. Stay current on efforts of peer institutions and other organizations
		5. Conduct regular, comprehensive Cultural Audits
		6. Revise policies, practices, and norms as needed to maximize inclusion
		7. Continue to influence all recruiting efforts of leaders and managers to ensure they demonstrate commitment and success in creating and maintaining inclusive environments for all constituents

Adapted from:

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<https://www.pdx.edu/sites/www.pdx.edu.studentaffairs/files/MCOD%20Best%20Practices.pdf>