

**12 CRITICAL SUCCESS FACTORS**  
**To Create an**  
**Inclusive Organization**

Thomas Sheldon Griggs, Ph.D.



## TABLE OF CONTENTS

- 3 ACKNOWLEDGEMENTS
- 4 INTRODUCTION
- 5 DIVERSITY & INCLUSION
- 6 *FACTOR 1 – Senior Leadership Commit to a Multi-Year Initiative*
- 7 *FACTOR 2 – Include All the Historical–Isms*
- 8 *FACTOR 3 – Commit to Adopting a Unified Conceptual Approach*
- 9 *FACTOR 4 – Plan and Account for Strategic Action at Multiple Levels*
- 11 *FACTOR 5 – Empower an Inclusive Diversity Council*
- 12 *FACTOR 6 – Define and Allocate Adequate Resources to the Initiative*
- 13 *FACTOR 7 – The Council Commits to Becoming a Learning Laboratory*
- 14 *FACTOR 8 – Identify both Personal Objectives and Institutional Outcomes for the Council*
- 15 *FACTOR 9 – Commit to Common Training for Both Senior Management and the Council*
- 16 *FACTOR 10 – Senior Management Commit to Learning and Modeling Culturally Competent Behavior*
- 17 *FACTOR 11 – Include Cultural Competency Sets in Your Performance Development Review System*
- 18 *FACTOR 12 – Ensure All Activities Within the Initiative Create an Affirming, Respectful Experience for All Participants*
- 20 CONCLUSION

All rights reserved. No part of this book may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording or by any information storage and retrieval system, without permission from the author, except for the inclusion of brief quotations in review.

Copyright © 2015 Thomas Shelden Griggs, Ph.D., Raleigh, North Carolina

Published in the United States of America

## Acknowledgements

This paper depends greatly on the essential wisdom and long term support of my colleagues at *VISIONS, Inc.* I am deeply indebted to Dr. Valerie Batts, Hon. Angela Bryant and the other VISIONS consultants with whom I have worked to develop the understanding represented in this paper.

Those familiar with the original VISIONS material will note two changes. First, I have included reference to five levels of action planning here in critical success factor #4 rather than the traditional four levels. In my more recent engagements, my clients and I found it useful to distinguish the Group Level for purposes of both planning actions and collecting evidence of success. Secondly, in critical success factor #2 I have included only an abbreviated chart of historical -isms in order to provide a glimpse of the much more complex accounting used in VISIONS trainings. The purpose of this paper is to list the success factors, but not attempt to include all that VISIONS has to offer.

Please visit [visions-inc.org](http://visions-inc.org) or contact me directly at (919) 844-1990 for more information. I would be happy to connect you with the my colleagues within the VISIONS organization that can speak to your interests.

## Introduction

The lofty intention to create a genuinely welcoming and inclusive climate in your organization is not as quixotic an adventure as you may have believed. It is indeed possible to make real progress in a surprisingly short time when the right steps are taken early on in your initiative.

We know that far too often conversations about diversity and inclusion seem to go in circles. Earnest people and well-intended groups often spin their wheels for months, even years. It can be hard to know where to begin and once begun it doesn't get any easier. Disagreements about priorities and strategy are commonplace. Deeply held values are aroused. Feelings are hurt. Some people give up and silently withdraw. Others stay engaged but settle for repeating familiar platitudes, hoping that somehow their time and effort might make a positive difference. If this is your experience you are certainly not alone: in our experience most organizations spend at least some time going through this phase. It is understandable that you might feel frustrated or discouraged in these conversations.

*Far too often, conversations about diversity and inclusion seem to go in circles.*

The good news is that over the past three decades we have made significant progress in understanding the deeper dynamics of organizational change. In our work with organizations in every sector of the economy over this period we have also learned what it takes to succeed in an endeavor as complex as an inclusive diversity initiative. This paper is a distillation of what we now know and recommend.

## Diversity and Inclusion

First, my colleagues and I have come to distinguish organizational efforts aimed at achieving greater diversity from activities intended to create climates of inclusivity. We think of *diversity* as the numeric variety of people in a population. Efforts to increase diversity invariably lead to conversations about *recruitment*. *Inclusivity*, on the other hand, is about how people treat each other across their cultural differences and more broadly, it is about the creation of organizational culture or climate. Inclusivity is thus a conversation about both attraction and *retention*. This paper outlines the factors we have found to be essential in developing an organizational climate that is experienced as truly welcoming by a wide variety of cultural identity groups.

Whether your leadership team is a small group of individuals in a local nonprofit or a cabinet of VP's heading up corporate functions across the world, you will be well served to discuss and align on the following 12 critical success factors when planning and implementing your inclusive diversity initiative. These factors help explain why diversity efforts succeed when they succeed and why they fail when they fail. Therefore, making a commitment to these factors up front can save you valuable resources and months of struggle. These principles will hold true whatever the size of your organization and can be easily translated to fit the scale of your operation.

We recommend that you account for all of these factors, but not plan for them to be completed in strictly linear fashion. Their implementation is in many respects an iterative process. Some decisions must be made initially, such as the commitment of human resources and funding to launch your initiative, and then re-visited later when you have had the benefit of advanced training and additional dialogue on the strategic design of the initiative.

## CRITICAL SUCCESS FACTOR #1

### Senior Leadership Commit to a Multi-Year Initiative

Inclusivity issues are extremely complex, multivariate subjects, maintained by deeply emotional and largely unconscious forces, as well as long-standing institutional and cultural practices. In the United States, for example, civic leaders have struggled with effective approaches to equity issues during the entire course of our history. It is within the context of an anticipated lifelong journey that you will be launching and sustaining your initiative.

*It is within the context of an anticipated lifelong journey that you will be launching and sustaining your initiative.*

If you are assuming this proposition is self-evident, I can assure you it is not. Many managers, particularly those in older and larger organizations who have been around a long time, are accustomed to being asked to implement the latest new thing. They have learned that they can wait out the hype associated with the introduction of a new program and that it will inevitably be followed by another “new” program before long.

For some of your colleagues a lifelong commitment will be far too much to contemplate. The absence of such a commitment need not be a barrier to your success, however, because you do not need agreement on this point. It is more than enough to secure a three year commitment to launch an initiative. Over time, the lifelong nature of the journey will become apparent to those who might have been imagining the initiative was just another program-of-the-month.

## CRITICAL SUCCESS FACTOR #2

### Include All the Historical-Isms

There are many ways in which groups differ from each other but some differences matter more than others. When one group has been historically and systematically treated as less-than by another group and then also deprived of society’s opportunities and resources, the memory of the injustice is passed down generation after generation, especially if the attitude of superiority by the offending group remains relatively undisturbed. The list of the most egregious and enduring of these histories of discrimination is what we refer to as the *-isms*. Recognizing all of them is critical to the success of your initiative.

#### OPPRESSION

- RACISM
- SEXISM
- CLASSISM
- ELITISM
- RELIGIOUS
- MILITARISM
- AGEISM/ADULTISM
- HETEROSEXISM
- ABLEISM
- XENOPHOBIA
- LINGUISTIC
- REGIONALISM

#### VARIABLE

- Color/Ethnicity
- Gender
- Socio-Economic
- Education Level Place in Hierarchy
- Oppression on the Basis of Faith Orientation
- Military or Police Authority
- Age
- Sexual Orientation
- Physical / Mental Differences
- Immigrant Status
- Language
- Geographic

### Critical Success Factor #2 - Cont.

All of the historically disadvantaged groups adopted strategies to survive in the face of their particular experience of oppression. Those strategies included competing with the other disadvantaged groups for a share of the limited resources and opportunities that were available. Today, when given the opportunity to participate in a diversity leadership council, representatives of these same groups will understandably advocate their own interests first. In order to avoid replaying the competition that existed historically between the groups who are now at the table our second critical success factor is to collectively agree that there is no hierarchy of oppressions and that all the historical -isms relevant to our time and place will be equally considered.

*There is no hierarchy of oppression.*

When an organization prioritizes one -ism as more important than another, such as focusing its initiative solely on race or gender, it can result in a sense of betrayal amongst the other historically disadvantaged groups. Such a narrow focus will not work in the long run because a group that is free to tell the truth about one -ism will not continue their silence about the others.

### CRITICAL SUCCESS FACTOR #3

## Commit to Adopting a Unified Conceptual Approach

The most successful initiatives are based on a single comprehensive model of personal and organizational change that is capable of addressing the full range of issues in and around the organization. In order for your initiative to be systemic, to effect change at every level of the organization, you will want to consciously adopt and maintain a new common language for planning, training and evaluation purposes. Multiple theories and languages leave members of the community without the ability to teach and support each other in such a complex endeavor. A unified conceptual approach that is teachable and learnable allows understanding and skill-building to grow exponentially because participants in the initiative develop a learning community in which they become capable of teaching and supporting each other rather than depending solely on outside expertise.

*This common language approach also fosters  
a wonderful sense of community*

Adopting a unified conceptual approach will help you realize your intended results much earlier than expected and it will support the development of the internal capacity to provide teaching and training. This common language approach also has the additional benefit of fostering a wonderful sense of community, that “everyone is involved” and “we are finally working together” This positive effect is both a predictable result of your efforts and also a powerful stimulus to extend and maintain the culture you committed to creating.

## CRITICAL SUCCESS FACTOR #4

### Plan and Account for Strategic Action At Multiple Levels

The -isms were created and have been maintained historically through the interaction of activities at five levels: personal, interpersonal, group, cultural and institutional. A successful initiative in any organization can only be accomplished with conscious planning and meaningful results at each of these logical levels. Therefore, as early as possible we encourage everyone to become familiar with these distinctions.

#### ACTION LEVELS:

- 1) Personal
- 2) Interpersonal
- 3) Group
- 4) Cultural
- 5) Institutional

We recommend you develop your list of desired outcomes and your measures of success based on these same distinctions. When your initiative has succeeded beyond a shadow of a doubt, your proof of success in hand might look like this:

At the personal level, individuals will be giving reports of their own learning as they describe the transformation they have experienced in understanding and skill acquisition.

At the interpersonal level, you will hear reports of individuals being comfortable making contact for the first time with people who are different from themselves. You will hear an individual in dialogue with another person, talking about their experience with modern forms of the historical ism's in ways they had not done previously.

### **Critical Success Factor #4 - Cont.**

At the group level, you will see a body of individuals who were previously thought to be antagonistic to another group meeting and socializing with that other group. You will also see people having group discussions on topics of social justice that are effective because they have learned how to apply an agreed set of guidelines for effective dialogue.

At the cultural level, you will hear positive gossip and read stories in the news that recognize your success in creating a welcoming environment. You will point to significant symbolic events as evidence of culture change, such as a spontaneous yet well-organized gathering in public to take a stand on an emerging issue of equity and inclusion.

At the institutional level, you will have numbers in hand that describe the changes you have made in creating a mix of employees to more accurately match the population of consumers they work with. You will be able to point to changes in programs, staffing, procedures and funding that have the effect of making your workplace even more welcoming and inclusive than it was before.

Knowing the outcomes you are creating and articulating them with the breadth and precision of this five level analysis will be the key to planning your strategy and prioritizing your actions.

## CRITICAL SUCCESS FACTOR #5

# Empower an Inclusive Diversity Council

The next step is to create or renew your Inclusive Diversity Council (“Council” or “Diversity Council”) and position it to support your inclusion efforts. An Inclusive Diversity Council, of whatever size and name is appropriate for your organization, can be the cross-functional working group that studies issues, advises senior leadership and leads selected activities in support of your initiative. A successful inclusive diversity initiative is inherently and necessarily a participatory process. It is your Council who will model the process of learning cultural competency to the rest of your organization while demonstrating what taking effective action looks like. Many Councils also function as the most accessible point of contact for employees and staff who wish to participate in activities of your initiative. In larger organizations the Council also functions as the main point of contact with external inclusive diversity consultants.

The process by which the Inclusive Diversity Council is constituted and launched is always an important symbolic message to the rest of the organization. However, it is not possible to create an effectively sized council that is perfectly representative of every cultural group and every level and function within an organization. There are simply too many variables that must be taken into consideration. Therefore, the process of inviting and selecting members for the Council must be well-conceived and fully explained to everyone in the organization so that the representatives who sit on the Council are enrolled with the goodwill of those they represent. Thinking through the formation and launch of your Council may require the professional services of an experienced consulting team.

## CRITICAL SUCCESS FACTOR #6

### Define and Allocate Adequate Resources To the Initiative

While this success factor might seem obvious, more often than not in our experience organizations underestimate what it takes to create the lasting culture change they desire. For example, Inclusive Diversity Councils frequently discover that they did not receive enough support to allow them to fulfill their mandated responsibilities. If adequate resources are provided from the outset it empowers those who are devoting their time and energy to the success of the initiative. These contributors are encouraged by the knowledge that the time they are spending on the initiative will be protected and their regular work responsibilities will be supported by other staff if necessary. Defining resources of time, staffing and funds will free the Inclusive Diversity Council up to engage in the critical work of the initiative that only they can accomplish.

*Organizations often underestimate what it takes to create the lasting culture change they desire*

Not all initiative activities require new funding, however, and your Council can be charged with identifying the many strategies that do not. In addition, when you determine what resources you can make available in support of your effort, you can fairly expect your professional consulting team to recommend the most effective use and highest possible leverage for your investment.

## CRITICAL SUCCESS FACTOR #7

# The Inclusive Diversity Council Commits to Becoming a Learning Laboratory

By now in your planning process you hopefully have committed to learning one common language model to support the personal and organizational changes necessary to create the inclusive culture you want and deserve. Since it normally takes at least a year under the best of circumstances to see a distinctly new set of cultural competencies become integrated into a group's on-going behavior, it is essential that the Council begin by committing itself to become the learning laboratory that will model and inspire the learning process for the rest of the organization.

To be in a learning laboratory means to engage in an ongoing process of self-discovery while developing the requisite skills. The cultural differences that already exist amongst Council members (on such variables as color, gender, religion, class background, education, sexual orientation, national origin, language, physical and mental differences, age and location in the organizational hierarchy, etc.) can be utilized for learning purposes as the group plans and executes its action strategies. Council members should know that they will be living the process of transformation, not merely recommending transformation to others.

The second major reason to become a learning laboratory is that it is exciting and sustaining when done in excellence. Council members who experience great personal and professional value from the learning environment are able to maintain their commitment to the unfolding of the initiative over a much longer period of time without becoming emotionally depleted. Moreover, they enjoy sharing with their colleagues and co-workers that the activities of the initiative are stimulating and revitalizing. When a change is both effective and fun it will become part of your organization's culture.

## CRITICAL SUCCESS FACTOR #8

# Identify both Personal Objectives and Institutional Outcomes for the Inclusive Diversity Council

As mentioned above, diversity working groups do not naturally agree about the priorities for action in either large or small organizations. Moreover, they hardly ever agree on the process for undertaking action on a given priority. It is the very nature of multicultural work that one group's ideas about goals and process are different from those of other groups. Therefore, a Council should not search for priorities as if they somehow existed objectively. What works quite well is to start instead by enlisting group support for Council members to follow their existing personal and professional missions as they contribute to the initiative. Some of the Council members probably arrived on the Council already engaged in work that is contributing to the creation of an inclusive climate.

Do not, I repeat, Do not skip this first step of recognizing and honoring the work that people are already doing. Frankly, it is frightening how routinely Councils fail to fully support what its members are already doing to improve diversity and inclusivity. Do not be like them.

Once this strong platform of member support is established (and the value of Council involvement is thus further reinforced for its members) the group as a whole can move to the next step of considering a set of institutional outcomes. There may be some obvious goals that everyone roughly agrees on, such as the need to draft a 3 year plan for an inclusive diversity initiative or to respond to a specific list of complaints that were lodged by an offended group of individuals. Frequently, though, the establishment of organizational goals may need to be somewhat arbitrary in order to avoid the familiar trap of spending inordinate amounts of time searching for a phantom priority.

## CRITICAL SUCCESS FACTOR #9

# Commit to Common Training for Both Senior Management and the Inclusive Diversity Council

Our previous language and skill sets, even among well-intended groups, are not enough to get us where we want to go. The finest cast of actors and musicians, even with all their individual skill and experience, know that they must rehearse together extensively in order to ensure a successful performance. Merely to appear on the same stage, at the same time, under the same marquee, would not guarantee a memorable event.

One of the purposes of common trainings is to provide a supportive vehicle for establishing new interpersonal and group relationships between senior management and the Council. In fact, one of the ways people say they know that an initiative is truly succeeding is that they can point to newly formed one-to-one partnerships of advice and mutual support, e.g., between a Senior VP and a member of the Council's Executive Committee. When members of both senior management and a Diversity Council are committed to learning the same new model of personal and organizational transformation and begin to share a common language for planning and measuring initiative activities they naturally find it easier to develop genuine and equitable relationships with each other.

Moreover, the work of the initiative is far more likely to effectively and efficiently move forward when these positive working relationships are created and supported by simultaneous training experiences.

## CRITICAL SUCCESS FACTOR #10

# Senior Management Commit to Learning and Modeling Culturally Competent Behavior

*This is the single greatest predictor of the success of an inclusive diversity initiative.*

While it is especially symbolic and empowering for senior management to show up as invested in learning and leading by example, this success factor also includes all other constituent groups who have leadership influence in the community, certainly all those with teaching positions or supervisory authority over others. Modeling recognizable competent behavior is made possible by training in a consistent unified model that offers a distinct description of effective behaviors.

The first step to modeling culturally competent behavior is to have such a description. The second step is to publicly practice the described behaviors. Ironically, though, these are insufficient for success. The third step is to have these new behaviors actually be recognized as such by management's organizational critics. Lest this sound strange, remember that classism is deeply embedded in the history of labor relations in the U.S. Consider that one of the greatest challenges in your initiative may be to overcome the inertia of a prior belief that senior leaders are not willing or able to learn what they are asking everyone else to learn.

Happily, the development of a common language and the use of the five levels of strategy and measurement will give management's critics the ability to recognize the progress and contributions senior leaders are making to the initiative, especially if encouraged to do so by outside observers such as your professional consulting team.

## CRITICAL SUCCESS FACTOR #11

# Include Cultural Competency Sets in Your Performance Development Review System

The systematic acquisition of cultural competency skills throughout an organization depends strongly on supervisors' utilization of a clear, teachable, learnable Performance Development Review procedure that is organized in a manner appealing and useful to the supervisor. The larger the organization, the more this is true. If your Performance Review system is not yet designed to account for a distinction between deliverable performance results and the competencies necessary to succeed in a given position, it is probably necessary to consider revising it. The ultimate, enduring success of your initiative will require specific policies and procedures in this regard.

*Your performance development review system should be clearly linked to the on-going inclusive diversity trainings you provide for supervisors.*

The language and concepts employed in your Performance Development Review system should be consistent with and clearly linked to the common language and assumptions provided in the on-going inclusive diversity trainings you provide for supervisors. If your existing trainings are not organized to result in the acquisition of specific named cultural competency skills, take the time to find a unified model that does so.

## CRITICAL SUCCESS FACTOR #12

# Ensure All Activities Within the Initiative Create an Affirming, Respectful Experience for All Participants

*(Author's Note: This is not a platitude! It is entirely possible to operationalize these virtues in a systematic and measurable manner.)*

Most of us want to create learning environments that are so respectful, relevant and affirming that participants come away eager for the next opportunity to be together. Unfortunately, the history of the -isms is a painful one. It is not merely understandable, but expected and acceptable that some people bring experiences of anger, hurt and mistrust when they are invited into the possibility of authentic dialogue on this subject. There are other individuals who take it upon themselves to righteously catalog the failures of their own colleagues (but not themselves) in the misguided belief that shaming others is the best motivation for social change. To meet these challenges you must know exactly how you are going to protect and affirm everyone who participates in initiative activities.

*It is not merely understandable, but expected and acceptable that people bring experiences of anger, hurt and mistrust when invited into authentic dialogue on this subject.*

Your unified training model should provide you at least these two supports: first, a common set of guidelines for effective dialogue that participants can follow to protect themselves from subtle forms of blaming and shaming; and second, specific skills for giving and receiving unusually high levels of positive recognition.

### **Critical Success Factor #12 - Cont.**

Meetings, supervision sessions and inclusive diversity trainings can all exemplify a rigorously non-blaming, non-shaming environment for everyone involved if you employ the right set of guidelines. Injurious transactions can be identified, interrupted and learned from at the earliest possible moment in order to authentically create the welcoming, affirming culture you intend.

The experience of affirmation and respect need not be left to chance. Every activity within your inclusive diversity initiative is an opportunity to create immediate personal and organizational value for the participants. It is also a chance to empower your colleagues and co-workers to exchange unprecedented levels of positive recognition.

## In Conclusion

Thank you for your interest in creating climates of inclusivity and affirmation. It is entirely possible that you can succeed beyond your fondest dreams and expectations when the critical success factors are implemented with clarity and rigorous, but gentle, persistence. It is not only also possible, but indeed certain that you will experience some setbacks and adverse events. We will be unpacking the inexorable effects of our long history for years to come. Such is the nature of the work. I am happy to say that such challenges are not sufficient to stop our progress and ultimate success. We know this from experience.

Remember that your success will be made possible by your declared commitment to intentionally co-create a consistent learning environment in which particular cultural competency skills are taught and learned within a common framework of your choice. Best wishes. I wish you courage, strength and inspiration for the journey.