The Sustainable Enterprise Learning Guide

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Chapter 2
Mental models for sustainability: Developing culturally competent agreements

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Editors' Notes:

These materials are intended for use by academics and practitioners. In order to simplify the language, editors have determined to use the terms instructors, learners or participants rather than facilitators, professors or students

ACTIVITY INTRODUCTION AND OVERVIEW

Objectives

Upon completion of this activity, the learner will/will be able to:

1. Describe their own and group (group) members' cultural location and the impact on developing group common agreements
2. Articulate the influence of prevailing mental models (both individually and collectively) on group common agreements as related to promoting more culturally competent and sustainable practices
3. Develop plans for promoting both individual and group member investment in deciding how a group will operate

Activity Length

90 minutes

Audience Description

These activities are designed for the undergraduate, or graduate/practitioner level learners.

ACTIVITY PREPARATION

Activity Name	Co-Creating Culturally Competent Group Member Common Agreements Part 1
Preparation Checklist	**One Week in Advance** ❑ Ask learners to read Chapter 2 in The Sustainable Enterprise Fieldbook ❑ Ask learners to read Chapter 6 from St. Onge, P. (Ed.) [Contributing Authors: Applegate, B., Asakura, V., Moss, M., Rouson, B., Vergara-Lobo, A.] (2009). E*mbracing cultural competency: A roadmap for nonprofit capacity builders*. Minnesota: Fieldstone Alliance. ❑ Assign pre-reading (see list below) – make and distribute copies of assigned pre-reading ❑ Assign learners into 4 small groups prior to the session. Bring the list of names/assigned groups with you to the session ❑ Make one copy for each learner of Handouts: Co-developing culturally competent common agreements, parts 1, 2 and Role theory for use in the session ❑ Confirm venue, catering, and in-room supplies and audio visual equipment. ❑ Ensure there are four flip charts and four flip chart stands with plenty of magic markers and tape to post the completed flipcharts.
Timing Flow	Step 1. Review objectives — 3 minutes Step 2. Review Handout: Key definitions — 10 minutes Step 3. Mental models exercise — 10 minutes Step 4. Review cultural iceberg — 10 minutes Step 5. Review slides 3-5 — 5 minutes Step 6. Group exercise — 30 minutes Step 7. Activity debrief — 10 minutes Step 8. Summary — 10 minutes
Total Time	90 minutes
Pre-reading	 • St. Onge, P. (Ed.). (2009). Embracing cultural competency: A roadmap for nonprofit capacity builders. Chapter by Applegate, B. (Ed.). (2009). *My journey is a slow, steady awakenin*g. Minnesota: Fieldstone Alliance. • St. Onge, P. (Ed.). (2009). Embracing cultural competency: A roadmap for nonprofit capacity builders. *Cultural Competency as Discovering Context*. Minnesota: Fieldstone Alliance. • Wirtenberg, J., Russell, W. G., & Lipsky, D. (2008). The Sustainable Enterprise Fieldbook, Chapter 2, *Mental Models for Sustainability*: Greenleaf Publishing and AMACOM. • Assignment: The Ladder of Inference • Assignment: Key definitions
Pre-work	None

ACTIVITY: DEVELOPING CULTURALLY COMPETENT AGREEMENTS

This activity helps learners develop culturally competent agreements.

Instructor Notes	Activity Description
Step 1. Review objectives **Sessions Objectives** • Have enhanced awareness of own and team members' cultural location and the impact on developing group common agreements • Be able to articulate the influence of prevailing mental models (both individually and collectively) on group common agreements as related to promoting more culturally competent and sustainable practices • Have enhanced knowledge and plans for promoting both individual and team member investment in deciding how a group will operate Slide 1	**Do:** Show Slide 1. **Say:** By the end of this session you will/will be able to: 1. Describe your own and group members' cultural location and the impact on developing group common agreements 2. Articulate the influence of prevailing mental models (both individually and collectively) on group common agreements as related to promoting more culturally competent and sustainable practices 3. Develop plans for promoting both individual and group member investment in deciding how a group will operate **Say:** Let's start by addressing any questions you may have from your review of the key definitions handout to ensure we are all using a common language. Who has a clarifying question? Let's review the ladder of inference handout. Who can summarize what the ladder describes? **Do:** If learners do not raise questions about key definitions - probe more deeply especially with definition of cultural competency, white privilege. Facilitate inquiry. Focus on the definition of cultural location since this is questioned several times in the activities below. **Say:** So let's explore mental models and the ladder of inference in action. Clear a space off on the table or your desk and turn to your neighbor and I want you to arm wrestle and try to win as many times as you can. Winning means bringing your opponent's arm to the table as many times as you can in fifteen seconds. Remember the point is to win: Ready begin! **Debrief** **Ask:**

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	What did you learn about your mental models about what it means to win? How did your own cultural location influence those mental models? How did your own cultural location and mental models interact with your partner's cultural location and mental models? What ladder of inference did you go up based on my instructions to you? Did your mental models support or detract from winning in this situation? if so, how? If not, why not? **Expected responses:** • For some winning was important even if it meat the other would lose. • Some did not care if they hurt the other • We took actions on our assumptions that we all believed that winning was important. • Gender plays a role. • Cultural background and education play a role in how hard we try to beat the other.
 Slide 2	**Do:** Show Slide #2. Facilitate dialogue - focus on bringing to the surface the attributes of the learners in the room. **Say:** As we know from our key definitions handout the cultural iceberg metaphor includes the visible, outward attributes of culture including food, dress, music, art, dance, literature, language, and celebrations. Below the surface, however, are the more subtle and invisible attributes such as attitudes, values, competitive or cooperative ways of engaging with people, patterns of emotional response, relationships to time and space, and styles of nonverbal communication. **Ask:** Why is understanding the cultural iceberg important to co-developing culturally competent common agreements? **Expected responses:** • Much of what happens is under the surface – unknown ot others. • All we can know is what people do or say 0- not their attitudes and values that are culturally determined. **Say:** Let's talk about groups now. Task groups, process improvement quality groups, "trigger groups," or any of the hundreds of other groups or teams are often expected to produce results even before they have had time to introduce the participants! Each group of people thrown together and declared to be a "team" brings to the table different history of experience with prior groups, diverse personalities, varied expectations, and assorted levels of awareness of their own mental models which often unconsciously shape their behaviors and interactions on groups.

Instructor Notes	Activity Description
	What is happening between and to team members while the group is working directly affects how well the group functions. Sensitivity to human needs for power, achievement, and inclusion, as well as differing values, cultural locations, historical contexts, experience levels, and influence styles, allows leaders and members to better manage discussions, to diagnose group problems early, and to deal with them more effectively. Unless the group can come to consensus at the outset as to how this particular group of individuals will "work together," they are less likely to achieve their goals in an effective manner. They may have some degree of success without such guidelines, but the experience will be less than positive for some, if not all, of the involved players and is likely to be less efficient (take more time). **Do:** Ask learners to review the Handout: Role Theory. Continue inquiry and dialogue about what the learners already are aware about themselves. **Say:** I would like to now review briefly Handout: Role theory. For all group members to maximize their performance, it is important that each member understands and plays the appropriate role at the right time. Building an effective group is dependent on how the relationships between the dynamics of task, process and relationship are managed. **Task roles** include the what and why of the work. **Process roles** include how you do the work. **Relationship** roles include interpersonal and inclusion group dynamics. **Do:** Ask for a show of hands when you ask these questions: Who in this session generally is drawn to process roles and which ones are you specifically drawn to? What about the task roles? Who is drawn to those roles? Which task roles do you generally focus on? And who among you focuses on the relationship roles? Which ones do you find yourself drawn to? **Say**: As you work in small groups later in this session it will be critical for you to refer to remember that ultimately the goal for each group member is to internalize awareness of the need for all the task, process and relationship roles in the group, to be able to identify when one is missing, and to develop enough expertise in a specific task, process or relationship role to take the lead when necessary. Task, process and relationship roles are all needed in a group or team. Without all three the group effort will fail. Their value is equal –the means in which you meet goals is as critical as meeting the goal, and maintaining integrity filled relationships is as important as achieving the task and how you go about it. Now let's talk about how to develop culturally competent common agreements. Intentionally developing and using culturally competent common agreements that support how the group or team is going to operate can help manage the behavior of

Instructor Notes	Activity Description
Culturally Competent Agreements • Culturally competent common agreements usually express the beliefs or desires of the majority of the team and make explicit the behaviors that should or should not take place in team interactions. Slide 3	group members both during and between meetings. **Do:** Show Slide #3. **Say**: Culturally competent common agreements usually express the beliefs or desires of the majority of the group and make explicit the behaviors that should or should not take place in group interactions.
Culturally Competent Agreements • Culturally Competent Common Agreements help: • Express the values and desires of team members. • Make sure every team member knows and agrees with what's expected of him or her. • Support the needs of the team and reflects the diverse culture of the organization's staff and stakeholders. • Evaluate team performance. • Orient new members to team expectations of "how things are done." Slide #4	**Do:** Show Slide #4. **Say**: Culturally Competent Common Agreements help: • Express the values and desires of group members. • Make sure every group member knows and agrees with what's expected of him or her. • Support the needs of the group and reflects the diverse culture of the organization's staff and stakeholders. • Evaluate group performance. • Orient new members to group expectations of "how things are done."
Culturally Competent Agreements Below are some common team dynamics for which explicit culturally competent common agreements can be established: •**Team meeting logistics and attendance** •**Team member roles and behavior** •**Team decision making** •**Team member rewards and recognition** Slide #5	**Do:** Show Slide #5. Provide 1-3 examples of the areas of group or team dynamics under each heading when reviewing slide 5. Below are some common group dynamics for which explicit culturally competent common agreements can be established: • **Team meeting logistics and attendance** including: group/class meeting dates; meeting times and length; s; provision for a makeup meeting; Meeting locations; person responsible for who will arrange for securing meeting rooms, equipment, refreshments; breaks, if included; ; person responsible for creating the agenda; deadline for placing an item of the agenda; process for placing an item on the agenda; person responsible for making sure assigned tasks are completed; any penalty for noncompliance of assigned tasks; number of members necessary for a quorum; method for handling latecomers; any action necessary to respond to repeated absences; permitting guests at group meetings; acceptability of absent members sending substitutes in their place. • **Team member roles and behavior** including: provision for a meeting facilitator; facilitator role(s) and responsibilities; provision for role of group leader; development of behavioral and performance norms for group

Instructor Notes	Activity Description
	members; designation of a dedicated or assigned recorder and/or timekeeper; method to balance the task process roles on our group; confidentiality of group discussions (shared with participants only, others?); behaviors/actions to be encouraged/discouraged at group meeting; methods for providing feedback and constructive criticism between and among group members. • **Team decision making** including: how will decisions be made? who will be involved in what decisions? What will be the process to review, challenge and remake decisions? How will decisions be communicated to others? How do we handle dissenting opinions? Do those opinions stay within the group in order to communicate solidarity of the decision or are group members free to communicate their individual opinions outside the group? • **Team member rewards and recognition** including: how will group members be rewarded for work? Individually or collectively? What types of rewards and recognition are meaningful to learners? *How to create Culturally competent common agreements* **Say:** • The following learners have been assigned to Group 1...*[insert names here]* who will focus on logistics and attendance. • The following learners have been assigned to Group 2... *[insert names here]* who will focus on roles and behavior. • The following learners have been assigned to Group 3... *[insert names here]* who will focus on decision making. • The following learners have been assigned to Group 4... *[insert names here]* who will focus on rewards and recognition **Say:** We are going to get into small groups and develop and share a list of culturally competent common agreements. All small groups will answer three sets of questions. In addition, each small group has been assigned one specific topic to develop culturally competent agreements based on your new or deepened understanding about the importance of being aware of: 1. You cultural location(s) 2. Your mental models 3. The application of role theory which advocates that both task and process roles are in balance at all times **Do:** Have the learners get into the pre-assigned four small groups prior to reviewing the instructions. Distribute Handout: Culturally competent agreements, part 1. Ask different group members from each small group to read sections of the instructions from Handout: creating culturally competent agreements, part 1 out loud to the full group. Ask if there are any clarifying questions. The instructions are repeated below. **Step 1**. Each member of the small group will think of past groups or teams they have

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	served on that have been effective and what made those particularly successful. Take time to reflect individually and jot down specific characteristics of the past group and be prepared to share with the full small group. Discuss all ideas in your small group and co-develop a list of recommended common agreements based upon past positive experiences from effective and successful groups your small group members have served on. **Step** 2. Review the cultural iceberg metaphor slide (Slide 2). Take time to reflect individually and write down answers to the questions below and be prepared to share with the full small group. Discuss all ideas in your small group and co-develop a list of recommended culturally competent common agreements. Add the recommended culturally competent common agreements to the list you began in step 1 on the flip chart paper provided each small group. *Questions:* 1. What are some of the things that are *above* the surface and visible among group members? 2. What is *below* the surface and what is not visible? 3. To be more culturally competent as a group what of the things you noted that were below the surface might need to come up and be discussed to support creating a more culturally competent group? **Step 3.** Review the cultural location definition from the pre-reading: Key definitions and the Handout: Role theory. Take time to reflect individually and write down answers to the questions below. Be prepared to share your responses with the full small group. Discuss all ideas in your small group and co-develop a list of recommended common agreements. Add the recommended culturally competent common agreements to the list you began in steps 1 and 2 on the flip chart paper provided each small group. *Questions:* ***What's going on with me?*** 1. What cultural location(s) do I bring with me to this group? 2. What mental models based on my cultural location(s) do I hold about the criteria for when groups are effective and successful? 3. What are the power positions and dynamics that I bring to the group, based on my cultural location(s)? 4. Based on the role theory handout, what role do I typically play on a group? What role do I typically avoid on a group? ***What's going on in the group?*** 1. What cultural location(s) do I perceive other group members bring to this? 2. What mental models might they hold about the criteria for when groups are effective and successful? 3. What are the power positions and dynamics that I perceive other group members brining to the group based on their cultural location(s)? 4. Based on the role theory handout, what role(s) do I observe other group members typically play? What roles do I observe them typically avoiding? ***What historical and structural issues are at play?*** Describe the practices of this group as they relate to power and privilege based on

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	the 10 social identities below: • Race and ethnicity • Education • Socioeconomic status (class) • Language • Immigration status, national origin • Gender; gender identity • Sexual identity • Physical ability and disability • Age; generation • Religion Questions: 1. Who has had to overcome what to be on the group? 2. Where are there likely points of privilege? Where are there likely points of internalized oppression? 3. How as a group can we better recognize these issues for what they are? 4. How can I individually address the issues in their historical context, seeing beyond who is in front of me *and* recognizing the many shoulders on which we all stand? **Step 4.** Once your small group has posted on flip chart paper all the co-developed culturally competent common agreements, please let me know. **Full Group Debrief** **Say:** Spokespersons from each small group will now review the flip charted recommended culturally competent common agreements from this first iteration with the full group. After each presentation there will be time for clarifying questions. Once each small group has presented their recommended culturally competent common agreements with the full group, the full group will finalize the consensus set of culturally competent common agreements. Many of the suggested common agreements will likely be similar, and our ensuing full group discussion may be greatly shortened if we identify natural consensus agreements along the way. As a full group, depending on the detail of the suggested common agreement, additional discussions/negotiations may be necessary. **Do:** Have each small group come to the front of the room with their completed flip charts of recommended common agreements. Have the spokesperson from the group present the recommended common agreements. **Say:** Group number **3** may we begin with reviewing your suggested culturally competent common agreements?

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	Ask: Are there any clarifying questions for group 3? **Expected response:** *[These will vary based on the presentation.]* **Say:** Group **1,** please report out your suggested culturally competent common agreements? Please note any natural agreements with group 3 recommendations by simply saying "ditto" group 3 and placing a star by the recommended common agreement. **Ask:** Are there any clarifying questions for group 1? **Expected response:** *[These will vary based on the presentation.]* **Say:** Group **2** please report out your small group flip charted suggested culturally competent common agreements? Please note any natural agreements with groups 1 and 3 recommendations by simply saying "ditto" group 3 and placing a star by the recommended common agreement. **Ask:** Are there any clarifying questions for group 2? **Expected response:** *[These will vary based on the presentation.]* **Say:** Group **4** please report out your small group flip charted suggested culturally competent common agreements? Please note any natural agreements with groups 1 -3 recommendations by simply saying "ditto" group 3 and placing a star by the recommended common agreement. **Ask:** Are there any clarifying questions for group 4? **Expected response:** *[These will vary based on the presentation.]* **Say:** Now we are going to identify the final consolidated draft list of culturally competent common agreements based on the small group recommendations. We will have an opportunity to further consolidate later on in the session and for now we want to identify the draft recommended list. **Say:** Based on your new or deepened understanding about the importance of being aware of:

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	1. Your cultural location(s) 2. Your mental models 3. The application of role theory which advocates that both task and process roles are in balance at all times and 4. Building upon the recommended culturally competent common agreements developed in steps 1-3, each small group will co-develop specific culturally competent common agreements for one of the four areas of group dynamics below. Review to the iceberg metaphor and cultural location slides and the role theory and responsibility charting handouts. 5. Take time to reflect individually and jot down answers to the questions below and be prepared to share with the full small group. Discuss all ideas in your small group and co-develop a list of recommended common agreements. 6. Each group will add the recommended common agreements from this next step to the flip charted recommendations from steps 1-3 for review and discussion in the full group. **Small Group 1:** *Group member logistics and attendance:* 1. On what day(s) will the group meet? At what time, for how long and where will the meetings take place? How many members are necessary for a quorum? 2. *If a meeting is canceled for any reason, will there be a makeup meeting, or will members simply wait until the next scheduled meeting? Can absent members send substitutes in their place?* 3. Who will arrange for meeting rooms, equipment, refreshments? How will mid-session breaks be handled? 4. Who is responsible for creating the agenda? What is the deadline for placing an item of the agenda? What's the process for placing an item on the agenda? 5. Who is responsible for making sure assigned tasks are completed? What, if any, is the penalty for noncompliance of assigned tasks? 6. *How will the group members handle latecomers? Is any action necessary to respond to repeated absences? Will guests be allowed at group meetings?* **Small Group 2:** *Group member roles and behavior:* 1. *Will we have a facilitator of the meeting and what will be the facilitator's role and responsibilities? What about a group leader? Will there be a dedicated or assigned recorder and/or timekeeper?* 2. What behavioral and performance norms for group members need to be in place for us to be effective and successful? What behaviors/actions are to be encouraged/discouraged at group meetings? 3. How will we intentionally balance the task process roles on our group? 4. *Are group discussions to be held confidential to participants only? How will we offer feedback and constructive criticism between and among group members?* **Small Group 3:** *Group decision making:* 1. How will decisions be made? Who will be involved in what decisions and in

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	what roles (see responsibility charting handout # 3)?

2. What will be the process to review, challenge and change decisions?
3. How will decisions be communicated to others?
4. *How do we handle dissenting opinions among group members when communicating a decision to others? Do those opinions stay within the group in order to communicate solidarity of the decision or are group members free to communicate their individual opinions outside the group?*

Small Group 4:
Group rewards and recognition:

1. How will group members be rewarded for work - individually or collectively (or other)? How will group rewards and recognition be communicated to others?
2. What types of rewards and recognition are meaningful to group members? What can the organization afford?
3. What will group leaders' roles be in recommending group rewards and recognition?
4. What will group members' roles be in recommending group rewards and recognition?

Full Group Debrief
Say:
 Spokespersons from each small group will now review the charted recommended culturally competent common agreements from the second iteration with the full group.   After each presents, there will be time for clarifying questions. Once each group has presented their recommended culturally competent common agreements with the full group, the full group will finalize the full set of consensus set of culturally competent common agreements.

Many of the suggested common agreements each group presents likely will be similar, and our ensuing full group discussion may be greatly shortened if we identify natural consensus agreements along the way.

As a full group, depending on the detail of the suggested common agreement, additional discussions/negotiations may be necessary.

Ask:
Group number **1** may we begin with reviewing charted culturally competent common agreements?

Do:
When they have finished, ask if there any clarifying questions for group 1 or comments. Focus the learners to ask clarifying questions only.

Say:
Group **4,** please report out your group's suggested culturally competent common agreements. Please note any natural agreements with group 1 recommendations by simply saying "ditto" group 1 and placing a star by the recommended common

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	agreement.
	Do: When they have finished, ask if there any clarifying questions for group 4 or comments.
	Say: Group **3,** please report out your charted suggested culturally competent common agreements. Please note any natural agreements with groups 1 and 4 recommendations by simply saying "ditto" group 1 or 4 and placing a star by the recommended common agreement.
	Do: When they have finished, ask if there any clarifying questions for group 3 or comments.
	Say: Group 2 please report out your suggested culturally competent common agreements? Please note any natural agreements with groups 1, 4 and 3 recommendations by simply saying "ditto" group 1, 4 or 3 and placing a star by the recommended common agreement.
	Do: When they have finished, ask if there any clarifying questions for group 1 or comments.
	Say: Now we are going to identify the final consolidated draft list of culturally competent common agreements based on the small group recommendations. We will have an opportunity to further consolidate later on in the session and for now we want to identify the draft recommended list.
	Do: Conduct a discussion to help them come to agreement.
	Say: Once the culturally competent common agreements have been agreed on among all group members, the final result should be recorded and distributed to all group members so that they will be aware of them as the group progresses in its assigned tasks.
	The common agreements should also become a part of the group's permanent records and should be reviewed at each group meeting until naturally internalized and reinforced by all members of the group.
	As the group works together, all members should use these common agreements as a guide for their behavior and interactions with others.
	When new members join, explain the group's common agreements. If many new members join, common agreements may need to be rewritten.

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	Periodically, or annually, the group should evaluate the effectiveness of their common agreements and revise them as needed. **Ask:** Did we complete the first step in the development of culturally competent group common agreements by finalizing the consensus set of common agreements from the sessions? Based on the culturally competent common agreements developed today what are the implications for future work together? What process shall we use to draft the final set of consolidated consensus common agreements based on our session today, prior to our next session? **Expected responses:** • Yes we completed the first step • If we were a work team we would have the protocols already determined • We could do a multi vote to determine which were the highest priority and assign someone to type them up and distribute them to the members.

ACTIVITY MEASUREMENT

- Completion of consolidated culturally competent common agreements from session 1

- Dialogue exploring implications of cultural location, mental models, and role theory on group common agreements

- Increased Individual self-awareness about the impact of cultural location and mental models on group members

- Group commitments to process to draft the final set of consolidated consensus common agreements based on the session prior to session 2

FOLLOW-UP: RESOURCES/ACTIONS

1. Applegate, B. "My Journey is a Slow, Steady Awakening." Chapter in St. Onge, P. (Ed.) [Contributing Authors: Applegate, B., Asakura, V., Moss, M., Rouson, B., Vergara-Lobo, A.] (2009). *Embracing cultural competency: A roadmap for nonprofit capacity builders.* Minnesota: Fieldstone Alliance.
2. St. Onge, P. (Ed.) [Contributing Authors: Applegate, B., Asakura, V., Moss, M., Rouson, B., Vergara-Lobo, A.] (2009). *Embracing cultural competency: A roadmap for nonprofit capacity builders.* Minnesota: Fieldstone Alliance.
3. Wirtenberg, J. and Russell, W. (Ed.). (2008). The sustainable enterprise fieldbook: When it all comes together. Sheffield: Greenleaf Publishing and New York: AMACOM

PRE-READING: LADDER OF INFERENCE

The Ladder of Inference[1]

I take

Actions

I adopt

Beliefs

I draw

Conclusions

I make

Assumptions

I add

Meanings

Reflexive Loop

(Our beliefs affect what data we select the next time.)

I select

"Data"

Observable "data" and experiences

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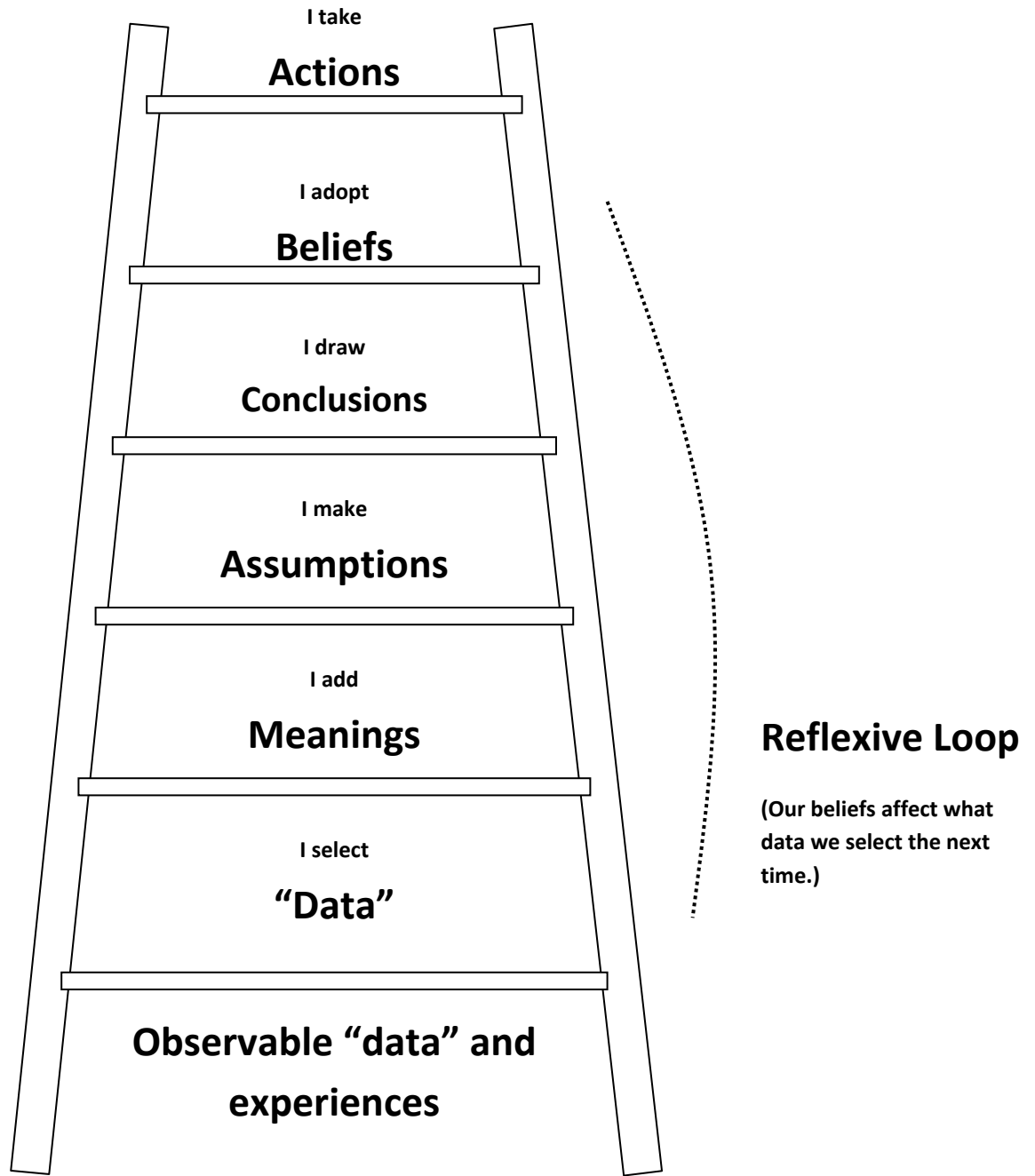
[1] Senge, P. M., Kleiner A., Roberts, C., Ross, R. B., & Smith, B. J. (1994). *The Fifth Dimension Fieldbook: Strategies and tools for building a learning organization.* New York: Doubleday Dell Publishing Group, Inc.

Our ability to achieve the results we truly desire is eroded by our feelings that:

- Our beliefs are *the* truth
- The truth is obvious
- Our beliefs are based on real data
- The data we select is the real data

We are so skilled at thinking that we jump up the ladder without knowing it:

- We tacitly register some data and ignore other data
- We impose our own interpretation on this data and draw conclusions from it
- We lose sight of how we do this because we do not think about our thinking
- The ladder of inference explains why most people don't usually remember where their deepest attitudes came from. The data is long since lost to memory, after years of inferential leaps
- Hence, our conclusions feel so obvious to us that we see no need to retract the steps we took from the data we selected to the conclusions we reached and we have jumped the ladder without knowing it
- Moreover, all the rungs of the ladder take place in our head. The only parts visible to anyone else are the directly-observable data at the bottom, and our own decision to take action at the top

Our skill at reasoning is both essential and gets us into trouble:

- You can't live your life without adding meaning or drawing conclusions. It would be an inefficient, tedious way to live.

We can improve your communication through reflection:

You can improve your communication through reflection, and by using the ladder of inference in three ways:

1. Become more aware of your own thinking and reasoning (reflection)
2. Make your thinking and reasoning more visible to others (sharing)
3. Inquire into others' thinking and reasoning (inquiry)

We can improve personal and group accountability through closing the loop:

You can improve personal and group accountability through closing the loop at the end of each meeting by answering the following questions:

What have we learned? Where are we now? Has anything been left unsaid that needs saying? What is needed for resolution? How can we move forward from here, given our new understanding?

Make a new agreement and determine how you will hold each other responsible for keeping agreements.

PRE-READING: KEY DEFINITIONS

CAPACITY BUILDING The "process" of developing and strengthening the skills, instincts, abilities, processes, and resources that organizations need to survive, adapt, and thrive in the fast-changing world.

COMPETENCY Is a measure of knowledge and skill in a particular field of practice. As its deeper level, competency is also a commitment to something more than the cultivation of a skill set.

CULTURALLY COMPETENT CAPACITY BUIDING Is a community-centered process that begins with an understanding of historical realties and an appreciation of the community's assets in its own cultural context. The process should enhance the quality of life, create equal access to necessary resources, and partner with the community to foster strategic and progressive social change.

CULTURALLY COMPETENT COMMON AGREEMENTS A set of intentionally agreed-to common ways of behaving/being with each other that are based in of the three C's of culturally competent capacity building (see definitions below) and self-awareness. The development of these agreements requires each person and the group as a whole to pay attention to how mental models, assumptions and cultural background and to intentionally identify and address individual behaviors that support or detract from a group's ability to build respectful, efficient agreements about how to work together, how to make decisions and how to hold each other accountable to the established common agreements in a culturally competent manner.

CULTURAL ICEBERG METAPHOR Include the visible, outward attributes of culture including food, dress, music, art, dance, literature, language, and celebrations. Below the surface, however, are the more subtle and invisible attributes such as attitudes, values, competitive or cooperative ways of engaging with people, patterns of emotional response, relationships to time and space, and styles of nonverbal communication.

CULTURAL LOCATION Includes the constellation of mental models that are at play and their interaction in a given situation. The mental models are influenced by: national origin; race; ethnicity; physical ability/disability; socioeconomic status; immigration status; religion; family constellation; language; generation; sexual identity; gender identity; age; gender; education.

THREE Cs of CULTURALLY COMPETENT CAPACITY BUILDING:
- **Context** - understanding historical and cultural realities that relate to the current situation
- **Community** - using a process that stays centered in a group of people who face their own unique challenges and possibilities
- **Change** - altering conditions in ways that advance equity for people and communities of color

COLLUSION When people act to perpetuate oppression or prevent others from working to eliminate oppression. Example: Able-bodied people who object to strategies for making buildings accessible because of the expense.[2]

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[2] The following definitions – Collusion, Cultural Racism, Individual Racism, and Institutional Racism are from: Adams, M., L. A., Bell, & Griffin, P. (Eds.) (2007) *Teaching for Diversity and Social Justice: A Sourcebook*. New York: Routledge.

CULTURAL RACISM Those aspects of society that overtly and covertly attribute value and normality to white people and whiteness, and devalue, stereotype, and label People of Color as "other," different, less than, or render them invisible. Examples of these norms include defining white skin tones as nude or flesh colored, having future time orientation, emphasizing individualism as opposed to a more collective ideology, defining one form of English as standard, and identifying only Whites as the great writers or composers.

INDIVIDUAL RACISM The beliefs, attitudes, and actions of individuals that support or perpetuate racism. Individual racism can occur at both an unconscious level, and can be both active and passive. Examples include telling a racist joke, using a racial epithet, or believing in the inherent superiority of Whites.

INSTITUTIONAL RACISM Is the network of institutional structures, policies and practices that create advantages and benefits for Whites, and discrimination, oppression, and disadvantages for people from targeted racial groups. The advantages created for whites are often invisible to them, or are considered "rights" available to everyone as opposed to "privileges" awarded to only some individuals and groups. Examples of institutional racism include policies and practices that: arbitrarily govern a person's credit-worthiness; determine what information, positive or negative, is presented in the media about individuals involved in newsworthy events; or place undue value on selective educational experiences or qualifications in establishing promotion criteria in jobs and schools.[3]

STRUCTURAL RACISM A structural racism analytical framework identifies aspects of our history and culture that have allowed the privilege associated with 'whiteness' and the disadvantage of 'color' to endure and adapt over time. It points out the ways in which public policies and institutional practices contribute to inequitable racial outcomes. It lays out assumptions and stereotypes that are embedded in our culture that, in effect, legitimize racial disparities, and it illuminates the ways in which progress toward racial equity is undermined.[4]

MENTAL MODELS Are the images, assumptions, and stories, which we carry in our minds of us, other people, institutions, and every aspect of the world. Like a pane of glass framing and subtly distorting our vision, mental models determine what we see. Mental models are usually tacit, existing below the level of awareness; they are often untested and unexamined. They are generally invisible to us until we look for them. The core task of the discipline is bringing the mental models to the surface, to explore and talk about them with minimal defensiveness. To help us see the pane of glass, see its impact on our lives, and find ways to re-form the glass by creating new mental modems that serve us better in the world.

PRIVILEGE A right that only some people have access or availability to because of their social group memberships (dominants). Because hierarchies of privilege exist, even within the same group, people who are part of the group in power (white/Caucasian people with respect to people of color, men with respect to

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[3] Examples are from Institute for Democratic Renewal and Project Change Anti-Racism Initiative. *A Community Builder's Tool Kit.* Claremont, CA: Claremont Graduate University, 2001.

[4] Fulbright-Anderson, K., Lawrence, K., Sutton, S., Susi, G., & Kubisch, A., (2004). *Structural Racism and Youth Development Issues, Challenges, and Implications*. New York: The Aspen Institute.

women, heterosexual with respect to homosexuals, adults with respect to children, and rich people with respect to poor people) often deny they have privilege even when evidence of differential benefit is obvious.[5]

WHITE PRIVILEGE Is the unquestioned and unearned set of advantages, entitlements benefits and choices bestowed on people solely because they are white. Generally white people who experience such privilege do so without being conscious of it. Examples of privilege might be "I can come to meeting late and not have, my lateness attributed to your race;" "Being able to drive a car in any neighborhood without being perceived as being in the wrong place or looking for trouble;" "I can take a job without having co-workers suspect that I got it because of my racial background;" "I can send my 16-year old out with his new driver's license and not having to give him a lesson how to respond if police stop him."[6]

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[5] National Conference for Community and Justice – St. Louis Region – unpublished handout used in the Dismantling Racism Institute program. (Source for 1st Part) Institute for Democratic Renewal and Project Change Anti-Racism Initiative. *A Community Builder's Tool Kit*. Claremont, CA: Claremont Graduate University. (Source for 2nd Part).

[6] McIntosh, P*.*, (1983). White privilege and male privilege: A personal account of coming to see correspondences through work in women. *Action Science and Intervention. The Journal of Applied Behavioral Science*, Vol 19, No 2, 115-135.

HANDOUT: CO-DEVELOPING CULTURALLY COMPETENT COMMON AGREEMENTS, ROLE THEORY

When individuals come together to form a group or a team

- Some members are task oriented
- Others focus on how the tasks are accomplished
- Still others are more oriented toward interpersonal group dynamics

As group development progresses, members generally settle into individual **"roles"** by intentional mutual consent, out of habit, or conscious or unconscious preference for one of the three group role orientations.

For all group members to maximize their performance, it is important that each member understands and plays the appropriate role at the right time. Building an effective group is dependent on how the relationships between the dynamics of task, process and relationship are managed. Three skill sets are necessary.

- **Task roles** include the <u>what</u> and the <u>why</u> of your work
- **Process roles** include <u>how</u> you do the work
- **Relationship roles** include interpersonal and inclusion group dynamics

Individual members of all groups must learn to utilize and value the expertise of all three skill sets.

Group Task Roles

1. **Information giver:** Offers authoritative information or data
1. **Information seeker:** Asks for clarification or accuracy of statements; will often ask "what's the goal we are trying to accomplish?"
2. **Opinion giver:** States beliefs or opinions relative to the discussion
3. **Standard setter:** Establishes criteria for evaluating opinions, ideas or decisions and keeps group focused on the task at hand

You may recognize yourself in a number of these task-related roles. Generally speaking you will find that you typically have a primary role that you play in the group dynamic.

- Do you feel you have expertise in one or more of these areas and most relate to task role responsibilities in groups?

- With what specific roles do you identify?

- As a member of the group, do you identify as someone who focuses on task roles?

Group Process Roles:

In comparison to task roles, process roles focus on the group's needs concerning commitment, dependence and involvement. Process roles include:

1. **Gatekeeper:** Pays close attention to how tasks are accomplished and often lead and facilitates communication
2. **Listening:** Paying close attention to what others talk about
3. **Accepting:** Respecting and promoting differences
4. **Representative:** Reports the group's process, progress or actions outside the group

- Do you feel you have expertise in one or more of these areas and most relate to process role responsibilities in groups?

- With what specific roles do you identify?

- As a member of the group, do you identify as someone who focuses on process roles?

Group Relationship Roles:

In comparison to task roles and process roles, relationship roles focus on interpersonal, social, and inclusion group dynamics. Relationship roles include:

1. **Encouraging:** Being open to others' opinions or feelings even if they are different
2. **Harmonizing:** Negotiating or relieving tensions when appropriate
3. **Supporting:** Giving group members permission to feel good about their successes
4. **Consensus seeker**: Pools the group for its readiness to make decisions or resolve conflicts

- Do you feel you have expertise in one or more of these areas and most relate to relationship role responsibilities in groups?

- With what specific roles do you identify?

- As a member of the group, do you identify as someone who focuses on relationship roles?

Ultimately the goal for each group member is to internalize awareness of the need for all the task, process and relationship roles in the group, to be able to identify when one is missing, and to develop enough expertise in a specific task, process or relationship role to take the lead when necessary.

The bottom line is that task, process and relationship roles are needed in a group. Without all three the group effort will fail. Their value is equal. The means by which you meet goals are as critical as meeting the goal, and maintaining integrity-filled relationships is as important as achieving the task and how you go about it.

HANDOUT: CO-DEVELOPING CULTURALLY COMPETENT COMMON AGREEMENTS, PART 1

Instructions:

At the completion of this activity you will be able to co-develop culturally competent common agreements that encompass your new or deepened understanding about the importance of being aware of:

1. You cultural location(s)
2. Your mental models at all times

Step 1. Each member of the small group will think of past groups they have served on that have been effective and about what made those groups successful. Take time to reflect individually and jot down specific characteristics of the past group(s) and be prepared to share with the full small working group. Discuss all ideas in your small working group and co-develop a list of recommended common agreements based upon past positive experiences from effective and successful groups on which your small group members have served.

Step 2. Review the cultural iceberg metaphor (slide # 2). Take time to reflect individually and jot down answers to the questions below and be prepared to share with the full small group. Discuss all ideas in your small group and co-develop a list of recommended culturally competent common agreements. Add the recommended culturally competent common agreements to the list you began in step 1 on the flip chart paper provided for each small group.

Questions:

1. What are some of the things that are above the surface and visible among small group members?
2. What is below the surface and may not be visible?
3. To be more culturally competent as a group, which of the things you noted in your small group that were below the surface might need to come up and be discussed to support creating a more culturally competent group?

Step 3. Take time to reflect individually and jot down answers to the questions below and be prepared to share with the full small group. Discuss all ideas in your small group and co-develop a list of recommended common agreements. Add the recommended culturally competent common agreements to the list you began in steps 1 and 2 on the flip chart paper provided for each small group.

Questions:

What's going on with me?

1. What cultural location(s) do I bring with me to this group?
2. What mental models based on my cultural location(s) do I hold about the criteria for when groups are effective and successful?
3. What are the power positions and dynamics that I bring to the group, based on my cultural location(s)?

What's going on in the group?

1. What cultural location(s) do I perceive other group members bring to this group?
2. What mental models might they hold about the criteria for when groups are effective and successful?
3. What are the power positions and dynamics that group members bring to the group based on their cultural location(s)?

What historical and structural issues are at play?

Describe the practices of this group as they relate to power and privilege based on the 10 social identities below:

- Race and ethnicity
- Education
- Socioeconomic status (class)
- Language
- Immigration status, national origin
- Gender; gender identity
- Sexual identity
- Physical ability and disability
- Age; generation
- Religion

1. Who has had to overcome what to be on the group?
2. Where are there likely points of privilege? Where are there likely points of internalized oppression?
3. How, as a group, can we better recognize these issues?
4. How can I (individually) address the issues in their historical context, seeing beyond who is in front of me, *and* recognizing the many shoulders on which we all stand?

Step 4. After each small group has discussed and co-developed the recommended culturally competent common agreements be sure all of them are posted on flip chart paper for steps 1-3.

Step 5. Once your small group has posted the co-developed culturally competent common agreements, please notify the instructor.

HANDOUT: CO-DEVELOPING CULTURALLY COMPETENT COMMON AGREEMENTS, PART 2

Instructions:

At the completion of this activity you will be able to co-develop culturally competent common agreements that encompass your new or deepened understanding about the importance of being aware of:

1. Your cultural location(s)
2. Your mental models
3. The application of role theory which advocates that both task and process roles are in balance at all times and
4. The application of the decision-making grid which advocates that clarity about roles in decision making is essential and
5. Building upon the recommended culturally competent common agreements developed in steps 1-3, each small group will co-develop specific culturally competent common agreements for one of the four areas of group dynamics assigned to your small group

Step 1. Review the iceberg metaphor (slide # 2) and the role theory and decision making grid handouts. Take time to reflect individually and jot down answers to the questions below and be prepared to share with the full small group. Discuss all ideas in your small group and co-develop a list of recommended common agreements. Each small group will co-develop and then write the recommended common agreements from this exercise on flip chart paper and we will review and discuss in the full group.

Step 2. Once your small group has posted on flip chart paper all the co-developed culturally competent common agreements, please notify the instructor.

Small group 1:

Group member logistics and attendance:

1. On what day(s) will the group meet? At what time, for how long and where will the meetings take place? How many members are necessary for a quorum?
2. If a meeting is canceled for any reason, will there be a makeup meeting, or will members simply wait until the next scheduled meeting? Can absent members send substitutes in their place?
3. Who will arrange for meeting rooms? Equipment, refreshments? What about mid-session breaks?
4. Who is responsible for creating the agenda? What is the deadline for placing an item of the agenda? What's the process for placing an item on the agenda?
5. Who is responsible for making sure assigned tasks are completed? What, if any, is the penalty for noncompliance of assigned tasks?
6. How will the group members handle latecomers? Is any action necessary to respond to repeated absences? Will guests be allowed at group meetings?

Small group 2:

Group member roles and behavior:

1. Will we have a facilitator of the meeting and what will be the role and responsibilities? Will there be a group leader? Is there a dedicated or assigned recorder and/or timekeeper?
2. What behavioral and performance norms for group members need to be in place for us to be effective and successful? What behaviors/actions are to be encouraged/discouraged at group meetings?
3. How will we intentionally balance the task process roles on our group?
4. Are group discussions to be held confidential to participants only? How will we offer feedback and constructive criticism between and among group members?
5. Based on the role theory handout, what role do I typically play on a group? What role do I typically avoid on a group?
6. Based on the role theory handout, what role(s) do I observe other group members typically play? What roles do I observe them typically *avoiding*?

Small group 3:

Group decision making:

1. How will decisions be made? Who will be involved in what decisions and in what roles (see responsibility charting handout # 3)?
2. What will be the process to review, challenge and change decisions?
3. How will decisions be communicated to others?
4. How do we handle dissenting opinions among group members when communicating a decision to others? Do those opinions stay within the group in order to communicate solidarity of the decision or are group members free to communicate their individual opinions outside the group?

Small group 4:

Group rewards and recognition:

1. How will group members be rewarded for work? Individually or collectively? How will group rewards and recognition be communicated to others?
2. What types of rewards and recognition are meaningful to group members? What can the organization afford?
3. What roles will group leaders have in recommending group rewards and recognition?
4. What roles will group leaders have in recommending group rewards and recognition?

HANDOUT: DECISION MAKING GRID

Instructions:

Step 1. Meet as a group and determine the types of decisions that the group will be making based on the purpose and scope of the group scope of work/mission/purpose. Co-develop a list of all the types of decisions that will be made by the group and circulate it to each group member.

Step 2. Create a blank Decision Grid for each member of the group. Ask each member to enter the group member names across the top of the Decision Grid horizontally, along with the co-created and agreed- to list of the types of decisions the group will make down the left-hand side of the grid.

Step 3. Ask each group member to individually complete the Decision Grid of "who is involved in what decision" according to the coding system provided and set a time to reconvene the group.

Step 4. The first step in completing the Decision Grid is determine who gets the "R" – the "R" represents who's responsible for getting the decision made. If you assess that you get the "R," then complete the coding for the decision for all other members of the group. If you don't think you have the responsibility for getting the decision made, complete only the column with your name in it for the decision. So for all decisions you'll have a coding in the column for your own name. For decisions for which you are responsible, you'll code everyone else for the decision. There can be only one "R" for each decision!

Step 5. After each group member has completed their Decision Grid, a Master Decision Grid should be created including all the unedited coding from all group members. At each intersection, simply write in the coding that has been turned in. Do not identify the owner. And, don't worry about duplication. Do no editing, as any duplications or holes will be discussed when the full group comes back together.

Step 6. Reconvene the group members at the agreed-upon date and time. Distribute copies of the master Decision Grid and restate the definitions of the codes and remind them of the assignment they've completed.

Step 7. Facilitate a discussion of each decision. Remember each decision must have one and only one R – one person must be responsible for each decision. The parties involved must agree on the relationships to each decision.

Coding Key:

Here's how the coding works. For any decision, there are three phases in decision making: 1) *before a* decision is made; 2) decision making; and 3) decision implementation.

Before a decision is actually made, usually the person responsible for getting a decision made ("R") wants to collect information from others impacted, involved or responsible for implementing the decision. This data collection can be a courtesy or a necessity.

Before the decision - If the information collection from another is a courtesy, that person gets a "T" at the intersection between that decision and their name on the grid. If you absolutely have to get information from another, that individual gets a "C" because a consultation is necessary.

During the decision making phase - As we've already stated, if you are the person described above, you get an "R" for "Responsible." And you're not alone. Others may support the decision making. They may be responsible for a piece of the decision or they may provide essential support in making the decision.

During the decision-making phase - if someone is responsible for a part of the decision or will provide essential support implementing the decision, they get a lower case "r," as they are "responsible" along with the "Rl."

During the decision-making phase - some group members need to be informed – they get an "I," while some one or more may have to approve the final decision at the group level. "IN" must be included in the decision making process. Those who must approve a group level decision get an "A."

Finally customarily someone else is sponsoring the group, usually from a higher level in the organization. In relations to this decision, he/she is the "big boss" whether he/she is a boss by title or not or whether or not this person sits on the group. That's the "R!" It is the responsibility of the "R" at the group level to keep the sponsor informed and updated on all group level decisions.

During the decision implementation phase - if you are primarily responsible for making the decision actionable you get an "IR". If you have partial or a supporting role in implementing the decision, then you get a lower case "ir." It is the responsibility of "IR" to keep the "R" updated and informed during the decision implementation phase.

Not all intersecting points between decision and group members must have a code. Nor must all group members give an assessment of "who does what" for each decision. Leaving a blank is appropriate, if the listed individual has no part in the decision.

Notes on Interpreting the Master Decision Grid:

No "R." If no "R" is marked for a decision, a gap exists. Often when no "R" is marked, several have admitted supporting roles ("rs"). Focus the discussion on those having partial responsibility and suggest that the individual with the most significant partial responsibility step forward to accept full responsibility for getting the decision made.

Multiple "Rs." Multiple "Rs" indicates an overlap. At best, this overlap can be negotiated between the involved parties. If necessary, the overlap may need to be deferred to the "R!" for resolution – the person with the ultimate responsibility for all decisions, goals for the group/organization. This is usually the CEO or Executive Director. Too many "R!s" – too many bosses. Too many "bosses" frequently occurs in complex organizations. Too many "R!s" only causes confusion to the person responsible – the "R."

Too many "As" – too many bosses. A rule of thumb is to have no more than three A's for any one decision. If a group member is responsible for a decision, getting more than three approvals is a daunting decision.

One person gets all the "Rs." Occasionally, the planet Krypton sends a Superwoman to assist us mortals, but more often we have to struggle along without help. Watch for the pseudo-Superwoman who tries to take on too many responsibilities.

"Puffing." Consider the difference between "touching base with" and "must be consulted." What can occur is "puffing." With chest puffed out, a group member may assert that his/her relation to the decision is that he/she must be consulted – not in consideration of the decision, but only to garner some authority or power within the group. This can also occur after decision implementation. For sake of ego, a group member may assert that he/she must approve, rather than just be informed after the decision is completed.

In both cases, the ultimate criterion for determining the difference should be the decision itself. Does the group member possess essential information for decision making or implementation? If so, he/she gets a "C" rather than a "T." Does the group member's approval make or break the success of the decision? If so, she/he gets an "A" rather than an "I."

Sample Decision Making Grid

Decisions	Beth	Trish	Neal	Lisa			...
1. Set the date for the fundraiser	"R,A,IR"	"C,IN,ir"	"C,IN,ir"	"T,I"			
2. Approve the budget for the fundraiser	"C,IN,ir"	"R,A,IR"	"C, IN"	"I"			
3. Select the venue for the fundraiser	C, IN,ir"	C, IN, ir"	"R,A,IR"	"I"			
4. Approve the vendors for the fundraiser	"C,IN,ir"	C,IN.ir"	C,I,ir"	R,A,IR"			
5.							
6.							

Step 1: List the type of group decisions vertically down the left-hand side

Step 2: List each group member's name across the top horizontally

Step 3: If you are the "R" for a specific decision complete the grid for all group members

Step 4: If you are not the "R" for a decision complete only your relationship to the decision. You will have a coding for all decisions in your name column. Sometimes "Rs", "As" and "IRs" are the same person(s).

Coding Key:

BEFORE the DECISION is MADE: "R" = Primarily responsible for getting a decision made for the group; "R!" = Overall/sponsoring responsibility' ***"T"* =** Touch base with; "C" **=** Must be consulted
MAKING the Decision: "A"= Must approve the decision; "IN" = Must be included in the decision making process; "I" = Must be informed about the decision
IMPLEMENATION of the DECISION: "IR"= Primary decision implementation responsibility; "ir" = Contributing, partial, supporting decision implementation responsibility