SHAPE THE
FUTURE
Summit
TOOLBOX

DAY ONE

WELCOME

Hello!

We are thrilled to welcome you to the Shape the Future: An Inclusive Leadership conference! We are excited to bring together such a diverse and talented group of leaders to have thoughtful discussions on building more inclusive workplaces!

Inclusion has always been at the core of effective leadership. When people feel respected, valued, and recognized, they are empowered to contribute fully. This leads to better ideas, innovation, engagement, and outcomes for all. However, we still have work to do before inclusion is the norm.

Over the next few days we will share research, best practices, case studies, and grassroots insights aimed at creating real change. We encourage you to ask questions, share ideas, and continue conversations outside the sessions. Collaborations that cross organizations and industries are essential to think the next great thoughts that will improve the world for all.

We hope you forge new connections at the conference and return to your workplaces energized with fresh strategies. When we shape the future together, leveraging all talent, we will find a world of possibilities.

Thank you for joining us on this journey,
Deanna Singh, Justin Ponder & the Uplifting Impact Team

Shifting Context

How to maintain integrity in changing times

What is your story leading to this summit?

What skills do you bring to this summit?

What goals do you have for this summit?

Core values

JOY

We believe that all of the solutions to the world's problems already exist. We just have to create the space for the people who have those ideas to thrive! So, when we come to this work, we come with a sense of optimism for what is possible.

We know that this work is not easy, so when we hit obstacles, we persevere through them and treat them as opportunities to learn and grow.

Even though sometimes we are called to do scary things, we stand with courage in our belief in others and in creating inclusive workplaces.

COLLABORATION

We listen for understanding.

We are always looking for opportunities to learn because we know there is always more to learn.

We seek differences by inviting different styles and opinions and encouraging people to share their ideas.

We do what we say we are going to do for each other.

GROWTH

We look for growth opportunities by always striving for continuous improvement.

We are always looking for proactive solutions. We understand that there is no one way to solve an issue, so we are open to being creative.

We focus on cooperation, solutions, and the future.

We are flexible and embrace constant change and ambiguities.

LOVE

At the core of our work is the desire to "human better." This requires us to think and act in love.

We exhibit empathy, compassion, and care for all of the individuals that we have the privilege of working alongside.

Our driving force is to create a world where everyone can flourish in the ways that work for them. To that end, our compass remains the best interests of everyone.

OUR LEARNING JOURNEY!

Building Resourcefulness:
Tricks on How to do MORE with LESS

Managing Power:
How do you Lead Across the Organization?

The Time Crisis in DEI:
How the Lack of Time Contributes to Burnout among DEI Leaders

Unifying Visions:
Optimizing DEI Strategies for Greater Impact

Shifting Context:
How to maintain integrity in changing times

Storytelling:
How To Package Your Vision to Inspire Others

OUR SCHEDULE

TIME	TUESDAY, MARCH 5	WEDNESDAY, MARCH 6
8–9:00	Breakfast Networking & Registration	Breakfast Networking & Registration
9:00–10:15	Opening/Welcome	Opening/Welcome
10:15–10:30	Break	Break
10:30–12:00	Building Resourcefulness Tricks on How to do MORE with LESS	Managing Power How do you Lead Across the Organization?
12:00–1:00	Lunch	Lunch
1:00–2:30	The Time Crisis in DEI How the Lack of Time Contributes to Burnout among DEI Leaders	Unifying Visions Optimizing DEI Strategies for Greater Impact
2:30–2:45	Break	Break
2:45–4:15	Shifting Context How to maintain integrity in changing times	Storytelling How To Package Your Vision to Inspire Others
4:15–5:00	Ask Me Anything Session	How We Move Forward!
6:00–8:00	MKE Dinner Experience	

Building Resourcefulness:
Tricks on How to do MORE with LESS

Building Resourcefulness:
Tricks on How to do MORE with LESS

Common assets

- Access to technology (computers, software, databases, etc.)
- Money and funding
- Extensive networks and connections
- Knowledge and expertise
- Data and information
- Tools and equipment
- Staff and human resources
- Mentors and advisors
- Reputation and influence
- Leadership and management skills
- Creativity and problem-solving abilities
- Office space and facilities
- Branding and marketing platforms
- Flexibility
- Passion and motivation
- Credentials and certifications
- Financial capital
- International scope and outreach
- Innovation and forward-thinking
- Trust and respect from colleagues
- Job satisfaction and engagement
- Risk-taking and entrepreneurial spirit

TIP 1: NOTE ASSETS

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TIP 2: BUILD RE-SOURCES

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Building Resourcefulness:
Tricks on How to do MORE with LESS

Common have-tos

- Communicate with colleagues (in-person, email, chat, phone calls, meetings)
- Collaborate on projects as part of a team
- Complete job-related administrative tasks (filing paperwork, submitting requests, filling out forms)
- Use computers and technology tools Manage schedules, calendars, and deadlines.
- Read and analyze information (reports, data, correspondence)
- Write documents, presentations, emails, etc.
- Conduct research to find information

- Make decisions or recommendations
- Solve problems
- Sell products or services/interact with customers
- Create deliverables (designs, products, services)
- Manage a budget
- Hire, train, manage direct reports
- Attend meetings, conferences, training sessions
- Give presentations
- Continually develop skills and knowledge for career growth
- Follow company policies and procedures
- Ensure workplace/jobsite safety
- Maintain supplies and inventory

TIP 3: NOTE HAVE-TOS

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TIP 4: MAKE FOLD-INS

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The Time Crisis in DEI
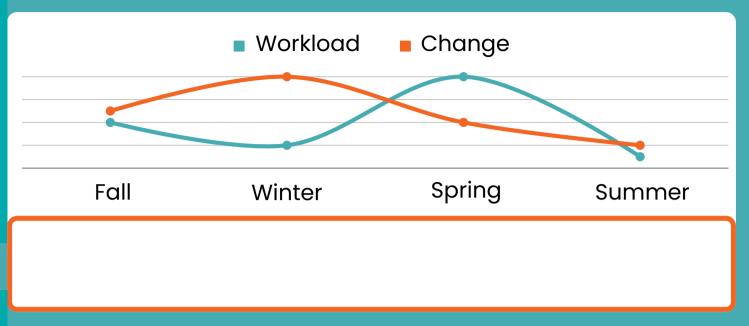
How the Lack of Time Contributes to Burnout among DEI Leaders

TIP 1: NAME YOUR SEASONS

Workload · **Change**

Fall · Winter · Spring · Summer

TIP 2: PICK YOUR TIDE

Workload · **Change**

Fall · Winter · Spring · Summer
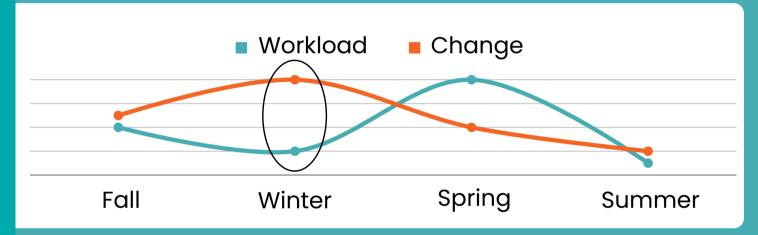
TIP 3: RIDE YOUR WAVE

RISE	Surveys, Focus Groups, Taskforce
CREST	Implement, Experiment, Collect Data
REST	Assess, Report, Celebrate, Re-Calibrate

■ Workload   ■ Change

■ Change

RISE	CREST	REST

Shifting Context
How to maintain integrity in changing times

"The arc of the moral universe is long, but it bends towards justice."
-Martin Luther King, Jr.

TIP 1: KNOW YOUR BLOCKS

BLOCKS	_____

TIP 2: TILT YOUR MIRROR

MIRROR	_____

TIP 3: PREP YOUR FAQs

FAQS	_____

RESOURCES PAGE

STATISTICS

- Diverse groups are 30% more accurate than homogeneous ones.
  - Katherine W. Phillips, "Is the Pain Worth the Gain? The Advantages and Liabilities of Agreeing with Socially Distinct Newcomers."

- 70% organizations rely on their ERGs to build a workforce that reflects their customer base.
  - Goode, Shelton. (August 25, 2016). "Are Employee Resource Groups Good for Business? Two Experts Debate the Issue." SHRM.

- Organizations with mentorship programs saw their managerial positions diversify by as much as 24%
  - Dobbin, Frank and Alexandra Kalev. (July-August 2016). "Why Diversity Programs Fail, And what Works Better." Harvard Business Review.

- Mentees are 5 times more likely to be promoted.
  - Quast, Lisa. (October 31, 2011). "How Becoming a Mentor Can Boost Your Career." forbes.com

- With anonymization, the hiring of women rises to 60%.
  - www.diversitybestpractices.com

- People are more than 5 times as likely to remain at a company that is inclusive.
  - Bush, Matt. (April 13, 2021). "Why Is Diversity & Inclusion in the Workplace Important?" Great Place to Work.

- If an employee leaves, an organization loses 6-9 months of full production.
  - USI. "Cost of Employee Turnover." mnwi.usi.com

- In the U.S., organizations lose $1 trillion every year on employee turnover.
  - McFeely, Shane & Wigert, Ben. (March 13, 2019). "This Fixable Problem Costs U.S. Businesses $1 Trillion." gallup.com

- Inclusive companies see 45% more innovation revenue.
  - BCG. (2021). "Diversity, Equity, and Inclusion." www.bcg.com

- 43% of 75 million millennials identify as ethnically diverse
  - Johnson, Stefanie K. (2020). *Inclusify.*

- 86% expect brands to support social change.
  - "2021 Edelman Trust Barometer." www.edelman.com

- Inclusive organizations are 70% more likely to reach new markets.
  - Jacimovic. (2/25/21). "The Importance of Diversity in the Workplace." What to Bec

RESOURCES PAGE

STATISTICS

- Organizations are 25% more likely to invest successfully if diverse.
  - Johnson, Stefanie K. (2020). Inclusify.

- 67% of prospective employees consider a company's DEI strategy.
  - Glassdoor Team. (November 17, 2014). "What Job Seekers Really Think About Your Diversity and Inclusion Stats." Glassdoor for Employers.

- Organizations with gender diversity at the highest levels are 25% more likely to achieve above average profitability. Those with ethnic diversity are 36% more likely to achieve the same.
  - McKinsey & Company (May 2020) "Diversity Wins: How Inclusion Matters."

- By 2060, the number of non-Hispanic White Americans will decrease from 61% to 44.3%. Black populations will increase to 15%, Asian populations to 9.1% and Hispanic Americans to 27.5%.
  - census.gov

- Diverse teams are more likely to avoid mistakes and create innovation.
  - Rock, D., et al. (November 2016). "Why Diverse Teams Are Smarter." *HBR*.

- Inclusive teams make better decisions 87% of the time
  - Korn Ferry. (2021). "The Importance of Inclusion in the Workplace."

- Resumes of "White-named" applicants receive callbacks 9.7%. Résumés of "Black-named" applicants with the exact same qualifications receive callbacks 6.5%
  - Bertrand, Marianne & Mullainathan, Sendhil. (September 2004). "Are Emily and Greg More Employable Than Lakisha and Jamal?"

- Reviewers note errors by White reviewees 49% of the time but notice errors by Black reviewees 70% of the time.
  - Reeves, A. (2014). "Written in Black & White: Exploring Confirmation Bias in Racialized Perceptions of Writing Skills." nextions.com

- 28,000 people from underrepresented groups were 10-15% more likely to more likely to quit not because of enduring negative work experiences but because of "missing out on positive work experiences" that their counterparts in majority groups take for granted.
  - "Deprivation at Work: Positive Workplace Experiences and the Racial Gap in Quit Intentions" by Peter Norlander

- Metrics of inclusion are fair treatment, integrating differences, decision-making, psychological safety, trust, belonging, and diversity, ERG membership, participation rates in mentoring programs and training
  - "How to Measure Inclusion in the Workplace" by L. Romansky. hbr.org
  - "Meaningful Metrics for Diversity and Inclusion" by Felicity Menzies cultureplusconsulting.com

RESOURCES PAGE

HELPFUL SOURCES ABOUT CULTURE CHANGE

- *Actions Speak Louder* by Deanna Singh
- *DEI Deconstructed* by Lily Zheng
- *DEI Reconstructed* by Lily Zheng
- *Inclusify* by Stefanie K. Johnson
- *Subtle Acts of Exclusion* by Tiffany Jana and Michael Baran
- *Erasing Institutional Bias* by Tiffany Jana and Matthew Freeman
- *The Leader's Guide to Unconscious Bias* by Pamela Fuller, Mark Murphy, and Anne Chow
- *Demanding More* by Sheree Atcheson
- *You Can't Talk About That at Work* by Mary-Frances Winters
- *The Memo* by Minda Harts
- *Listen Like You Mean It* by Ximena Vengoechea
- *Listening, Helping, Learning: Core Competencies of Process Consulting* by Mark L. Vincent
- *Doing Agile Right* by Darrell Rigby, Sarah Elk, and Steve Berez
- *How to Change* by Katy Milkman
- *The Art of Gathering* by Priya Parker
- *Pre-Suasion: A Revolutionary Way to Influence and Persuade* by Robert Cialdini
- *Belonging: The Science of Creating Connection and Bridging Divides* by Geoffrey L. Cohen
- *Start at the End: How to Build Products that Create Change* by Matt Wallaert
- *The 4 Disciplines of Execution* by Chris McChesney
- *Change (the) Management: Why We as Leaders Must Change for the Change to Last* by Al Comeaux
- *You Need a Manifesto: How to Craft Your Convictions and Put Them to Work* by Charlotte Burgess-Auburn
- *Transcend: The New Science of Self-Actualization* by Scott Barry Kaufman
- *The Fearless Organization: Creating Psychological Safety in the Workplace for Learning, Innovation, and Growth* by Amy C. Edmonson

REEWRITE: What questions do you have for us?

SHAPE THE FUTURE *Summit* TOOLBOX

DAY TWO

FREEWRITE: What takeaways stood out? What questions came up?

Managing Power
How do you Lead Across the Organization?

MANAGING POWER

LAUNCH A LISTENING TOUR

Data, rigor, regularity
Members, customers, competitors
Broaden context

CO-CREATE WITH DECIDERS

Don't seek approval
(too formal & late)
Seek advice
Seek assistance

MAKE IT EASY

Pilot
Fold-in
Micronorm

Common Inclusion Initiatives

Inclusive Meetings
Cross training
Socializing
Peer review
Coaching

Performance review
Hiring
Creating Employee Resource Groups
Mentorships
Messaging
Others?

Pre-Suade

Program Choice:

- Who's on your listening tour?

- What would you say to invite deciders to co-create?

- What would you do to make it easy for deciders?

Unifying Visions Optimizing DEI Strategies for Greater Impact

CASE STUDY

GENERIC INDUSTRIES
In 2005, Generic Industries launched its widget membership. At its peak, the company had captured 62% of that market. 73% of its customers are college-educated, salaried, 35-45-year-old, white, English-speaking U.S. Americans.

CHANGES
But growth slowed as the number of new customers shrank, stalling at an annual increase of .04%. The company's market share has shrunk as competitors expanded and began taking Generic customers.

COMPETITION
In 2022, Generic Industries market share fell by 12% as competitors expanded into previously unreached demographics for first-time memberships. With revenue from new customers, competitors are poised to launch new products that will further threaten Generic Industries. With no other revenue-generating strategy except increasing membership fees, Generic is set to lose even more ground as members leave for more economical services.

OPPORTUNITIES
To remain competitive and relevant, the company is looking to expand into Brazil. That market is large, interested in similar services, and ignored. Despite this opportunity, Generic Industries has a lot of work to do. They have never engaged the Brazilian market, know little about it, and have much trust to earn from it.

CHALLENGES
94% of employees at Generic Industries have worked for the company for more than 5 years. 86% have worked for the company since it began. A recent company climate survey shows 77% favor "the way we've always done things" and resist procedural and strategy change of any kind.

RESISTANCE
That same survey showed that 44% were highly suspicious of inclusion initiatives, convinced operations that consider social identity like race, gender, and nationality have nothing to do with business and undermine productivity. 56% said they believed greater inclusivity was essential to organizational success. 72% said they had no idea how to increase inclusion and felt overwhelmed by it.

ACTIVITY
Write an inclusion plan that will help Generic Industries resonate with this new market. Develop a unifying vision that will convince, inspire, and motivate team members to make the changes that will help the company resonate with the Brazilian market.

To complete this task, take some tips for unifying vision.

TIP 1: Start at the end: inspire support by clarifying the end goal
Vision statement: What is the broad "In a world" movie trailer moment that, when achieved, will prove the inclusion initiative has been successful and can be discontinued?

Quantitative: What are the objective numbers the company will achieve to prove success? (EX: hiring, promotion, retention, productivity, market growth, accounts, revenue, innovation, mentorship rates, training)

What are survey response percentages that could prove success? (EX: feelings of fairness, integrating differences, decision-making, psychological safety, trust, belonging, inclusion competence, inclusion confidence, etc.)

Qualitative: What are the kinds of testimonials that could prove success? (EX: from customers, team members, business partners, websites, awards, press, etc.)

TIP 2: Simplify goals: inspire support by making those goals few and simple
- Out of all the goals you've brainstormed above, which are demonstrable, doable, repeatable, sustainable, and influenceable?
- Which can be eliminated?
- Which can be revised?
- Which are most important?

TIP 3: Create a scoreboard: inspire support by making goals easily understandable
Track winning: show fun, cooperative, gamified progress

Inspire confidence and cooperation: structure in ways that encourages the supportive to continue and the reluctant to join

Take it to them: instead of passively expecting others to come to the scoreboard, create a plan for proactively, quickly, and frequently taking the scoreboard to them

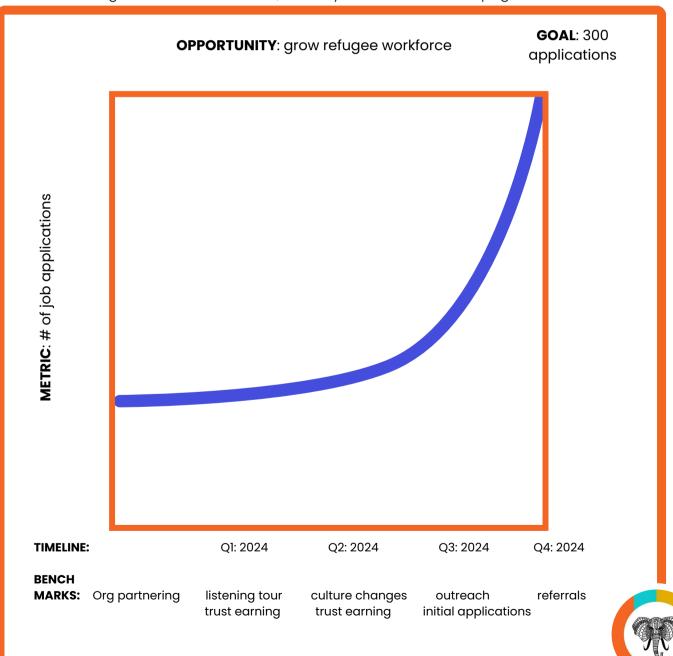Capture this info in a scoreboard that answers the following.
- What is the **opportunity**?
- What is the **goal**?
- What is the **metric**?
- What is the **timeline**? (lengths of time)
- What are the **benchmarks**? (events happening at each length of time)
- What is the **ideal** line of progress?

To help answer these questions, review the next page's model scoreboard.

MODEL SCOREBOARD

- What is the **opportunity**? Engage workforce of refugees
- What is the **goal**? Increase applications from this population from 50 to 300 by EOY
- What is the **metric**? # of job applications
- What is the **timeline**? (lengths of time) one year
- What are the **benchmarks**? (events happening at each length of time)
  - Partner with other orgs, start a listening and trust-building tour, make cultural changes based on learning, continue to earn trust, move beyond community partners to start outreach with community, accept initial applications from people recruited by company, generate applications from community referrals
- What is the ideal line of progress?
  - Start at 50 with a slow increase before exponential growth toward of EOY with referrals
- After reviewing the model scoreboard, create your own on the next page.

OPPORTUNITY: grow refugee workforce   **GOAL**: 300 applications

METRIC: # of job applications

TIMELINE:	Q1: 2024	Q2: 2024	Q3: 2024	Q4: 2024
BENCH MARKS: Org partnering	listening tour trust earning	culture changes trust earning	outreach initial applications	referrals

GOAL

OPPORTUNITY

METRIC

TIMELINE

BENCHMARKS

METRIC

Storytelling:
How To Package Your Vision to Inspire Others

STORYTELLING

TIP 1: REGROUP
- Build "good" to "gooder"
- Construct a collective (us, our, we, family, team)
- Discuss org as its own society

TIP 2: REFRAME
- Overcome novelty bias
- Highlight the commonplace
- Move from add-on AND fold-in to transform
  - "This thing we're already doing is also inclusion"

TIP 3: PERSONALIZE
- Diversify medium
- Emphasize process (move from "I am" to "We can")
- Model vulnerability ("I struggle")

Who are you?

What are your professional strengths?

When it comes to being inclusive, what do you struggle with?

How are you working on it?

What do you hope?

FORWARD

How will you move forward?

SHAPE THE FUTURE

CLASS OF 2024

reach for the stars!

Good Times

24