Staying the course: DEI is long game for businesses

Companies must actively create workplaces that foster unity, reflect America's diversity

Portland Business Journal Publisher and President Candace Beeke recently convened a roundtable to talk about diversity, equity and inclusion. On the panel were April Allen, Allen & Unger co-founder/partner; Hanif Fazal, Center for Equity & Inclusion founding partner and author; Dr. James Mason, Care Oregon chief equity and inclusion officer; Karen O'Connor, Stoel Rives partner/DEI committee chair; and Shawna Unger, Allen & Unger co-founder/partner who brought valuable insights to the discussion.

PRESENTED BY

Allen & Unger   CareOregon celebrating 30 years   center for equity and inclusion   Stoel Rives LLP

Candace Beeke: What does your organization do in regard to DEI? What are some challenges?

Shawna Unger: One of the things that brought us together into this work was our difference. I'm a white cisgender woman born and raised on a farm. April is a Black married woman with family roots from the South. Our differences led to our strategic advantage coming together within this business. We saw things like time, organizational and work values in different ways. That difference could not only make our business better, but we are able to leverage that for our clients.

April Allen: One thing that keeps coming up is generational differences. We'll do leadership coaching or training and people say, "I don't know how to get my team motivated." We've always had those generational differences, but right now we have five different generations in the workplace, so we're seeing it at a larger scale.

Leadership is not easy. You have so many different challenges leading teams that are so different. You have racial diversity, gender diversity, sexual orientation and gender expression, neurodivergence. What worked five and 10 years ago is not working anymore. We're seeing that organizations need help with coaching and leadership curriculum.

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> April Allen
> *Allen & Unger*

Hanif Fazal: Most of our engagements are long-term, building relationships with organizations that feel like they have a trusted partner who can help them navigate and provide targeted training, consulting, strategy. We also do shorter term work with organizations that want something specific for their leadership teams or specific challenges, or they are organizations just starting and want to know how to go there. It's about helping organizations figure out not just what DEI means and building common language and frameworks, but how to apply this in the workspace.

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Dr. James Mason: At Care Oregon. We do EDI as opposed to DEI. While it sounds like semantics, we like to think that we lead with equity, which informs the D&I. We focus on culturally and linguistically appropriate services, often called cultural competence, cultural humility, cultural responsiveness. We also focus on workforce development.

Something critical to think about is policy and how do we make it real, and not a passing thing, like some of the threats to DEI that we're hearing about now. We do a strengths-based assessment of who we are as a way to develop an intervention. It becomes an iterative process over time. We've developed training around identifying, interrupting and overcoming bias.

Challenges in health care — one is just the underrepresented minority and trying to push people into STEM, developing pipeline programs to bring a workforce that mirrors a 21st century demographic. The other challenge is around health outcome disparities based around race, ethnicity. And one of the last challenges we have is around unity. Our differences are often apparent, but not that significant. Whereas our similarities are often critical, but not that apparent. As we push diversity, we try to push areas where we're similar.

Karen O'Connor: At Stoel, we see an incredible disparity in whether and how well people know each other. Our younger attorneys, because they're on social media, know each other very well. The older attorneys know each other better because they've worked together for a long time, but they don't know the younger attorneys.

Some of our older folks say, "I don't like this whole authentic self thing. Just bring your lawyer self to work and do your job." So, understanding that if we know a little about each other, you're much more likely to help and support someone. How do we build community at the firm in a way that extends into the communities we serve? That's been a real challenge.

The other thing that's hard is figuring out how to balance and know whether and to what extent the firm should take a stand on social issues. We need to focus on building community because we don't do that very well anymore. We don't have a sense of community locally, globally or nationally.

Beeke: The Society of Human Resources recently announced they were dropping equity from their focused initiatives, replacing it with just diversity and inclusion. Their rationale was equity has a polarizing effect.

Unger: Leading with equity is the framework that April and I bring to the work. But there's no denying that this work has been politicized. April and I use a study published years ago in a lot of the work we do. It proved through research, that if they took majority groups and put them in focus groups and contrived

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scenarios, the delta between the majority group and the marginalized group shrank by virtue of the focus group. That majority group had a sense of unfairness. It codified that scarcity mindset that those of us who work in these spaces see and help organizations try to work through.

But we don't necessarily see that discomfort, which is real, as the polarizing factor. When we do our development training, we sit down with groups and walk through the American With Disabilities Act, for example, where people can see equity in a different way that they can understand. Like prior to the mid-1990s, when the ADA was passed, individuals who had a physical disability were not able to access certain job sites that they were completely capable of working within. We've found that when we spend time developing in those spaces, that it isn't the polarizing issue if you can get them to see it in a relatable, understandable way.

Allen: I don't know how you have inclusion if you don't have equity. As a black woman in the Pacific Northwest, I am not expecting utopia. But I am expecting incremental changes and transparency, at the very least. I want my pay to be on par with the white man who's doing the same job. I want to make sure as a working mother that there are not policies or practices, spoken or unspoken, in place that were developed when it was a male-dominated workforce — like an 8 a.m. meeting. Often women are still bearing the burden of getting the kids to school or making sure breakfast is there. This is a barrier that doesn't have to be there.

Mason: Something we found important around equity is to try to control the narrative. Many people talk about DEI in ways that aren't really DEI. We want to make sure our leaders understand. There are rationales for a diverse workforce and it's tied to the bottom line. It's not for the diverse people. If we think about DEI and who the beneficiaries are, it hasn't only been people of color. It's been women, seniors, LGBTQ, veterans, the poor, the neurodivergent. That's the story that hasn't been told. It's critical to get out in front of the narrative so it doesn't take on a life of its own and gets explained in a way that doesn't have any integrity anymore.

O'Connor: I feel both passionate and conflicted about (dropping equity). I feel like it's cowardly, disingenuous. On the other hand, when we have speakers coming or we're running trainings or leadership development or seminars, the title makes a huge difference in who shows up. If we include those loaded terms, it's a very different crowd. So if omitting the term equity from the title means I get people to come in and listen, I'm willing to do that if it means I've educated someone and made them buy into the work and the goals.

Fazal: When it comes to acronyms, I think we get caught up in our own language. It's disconnecting on a lot of levels, even for people who are into the work. On the other hand, I was in Salt Lake City and someone came up and said, "I really wanted to get into your workshop, and my organization receives state funds. In Utah, they passed legislation saying whoever's receiving state funds cannot engage in DEI work. So I changed the name on the application of your workshop."

I also was working on the corporate side with a CEO of a business who's scaling at a fast level across the country, and into Florida. He's not sure how to move into those spaces. Part of me says that as long as the work ends with equitable outcomes, a more inclusive culture, deep commitment to advancing equity and inclusion, then whatever you want to call it, as long as the work itself is equitable and inclusive, I'm OK.

The flip side though is shared meaning and definition of these words are part of how we move the work forward. When people engage in D&I work, they have to consider perspectives they hadn't considered before and include identities in the workspace in a way they hadn't. So at a leadership level, is there a core understanding around what equity is? Do I know how to communicate that? Good D&I work is helping leaders not just understand this work, but figure out how to bring people into this conversation.

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Beeke: What do you recommend as critical first steps for organizations early in their DEI journey?

Fazal: The work has to start with the leadership level, whether it's a large national business or a small nonprofit. Do I understand what D and I mean? Can I build a sense of personal value around this work and understand how it enhances organizational mission and bottom line? Second, can I champion this work to a diverse set of stakeholders? Do I understand what it means to be accountable and then socialize that throughout my organization? Third, am I clear about what it means to apply an equity lens onto policy, practice, procedure? About what it means to build an inclusive culture?

Finally, I see leaders' role as being willing to position themselves as learners. Have we created an environment and a culture at our leadership level where we can say we're not sure how to engage this issue, but we're open to learning? We've created cultures where learning isn't part of the cultural value or norm.

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> *Stoel Rives*

Beeke: What about companies that think this is a budgetary issue? Does an organization need one dedicated DEI leader to have an effective DEI program?

Mason: Budget matters, but shouldn't stop you from moving forward. I think you work to scale. Most of the organizations I've worked with haven't had enough money to do what I wanted to do. But it's critical to plant that seed. We're not doing it for the diverse people. My research over 30 years has confirmed that if we can convince an organization or leader that this is in their best interest, they will pursue it.

Wherever an organization is, that's where it is, so move forward from there. We don't compare organizations to other organizations, or individuals to other individuals. We compare them to themselves over time. You'll never get to the end of this journey, but the ride is worth it. And context is critical.

The idea of equity is very counterintuitive. I grew up in the Golden Rule-era where I was raised to treat people the way I want to be treated. I've inherited the Platinum Rule-era, where I need to treat people the way they want to be treated. Equity is about individualizing your approach and being sensitive to the population we're talking about. It will be a force going forward simply because of demographic shifts. Globalization is going to compel us to embrace this as a concept.

Beeke: How you are adjusting your DEI program in light of Supreme Court rulings and recent public announcements by many companies that they are scaling back or abandoning their DEI programs?

O'Connor: We were really strategic about looking at how are we going to make sure we're able to continue our DEI efforts unabated, regardless of what the Supreme Court says and doesn't say. The decision was specific to college admissions. So with respect to hiring, advancement and promotions within organizations, it literally has no impact. It might ultimately, but at least, for now, we're fine.

It has been dispiriting to see companies scaling back

their efforts, capitulating to the political noise, because I don't see how companies can deny or ignore the fact that it's just a basic principle, treat people fairly, meet them where they are. Those are core values.

People often use budget as an excuse; I have two responses. First, you can't afford not to. The biggest cost in most organizations is attrition. To bring someone on, train them and get them up to speed is an enormous investment in resources. If they're not happy and don't feel included, they walk out the door. On a more direct and immediate level, these efforts don't cost a lot of money, like a brown bag lunch. These can be very simple things to bring people together.

Allen: One thing I always encourage clients to do is just get the data, because that's going to be your biggest asset and ally against frivolous lawsuits that people say they're worried about. The second thing is EEOC claims are on the rise. So you're not helping yourself by not having programming in place around DEI because you are mitigating some of that legal risk and putting your organization in a better position to defend against that risk.

Fazal: D&I is messy, and organizations don't like to get messy. At times, D&I as an industry hasn't always been great. A lot of organizations said,

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> Shawna Unger
> *Allen & Unger*

"We've invested a lot of money, yet claims are still on the rise." But the practice is still growing, getting better. It's not something you abandon because one particular effort didn't work. There's been a bit of impatience. I look at D&I like I look at tech. About 20-30 years ago, it was nowhere as efficient as it is now. But we didn't give up on tech because it's wasn't as efficient or effective as we wanted it to be. We keep investing in it because it's going to make us a better business and allows us to do things we were never able to do before.

Beeke: Any myths or misperceptions about DEI that you would like to counter?

O'Connor: This idea that D&I work disadvantages the majority. The world is not a pie. If my piece is bigger, it doesn't make your piece smaller. It's very frustrating when people think that if you're giving opportunities, dedicating resources to make your organization more inclusive, that that is excluding others. There is room for everyone.

Mason: The myth that DEI is for marginalized groups, when it's in all of our best interests. I don't think that is asserted enough. The other myth is that you need a ton of money to get started. Not necessarily, depending on how you approach it. And then who can do it. It doesn't have to be the marginalized individuals and experts. Anyone can do this. We have to make everyone understand this is in our collective best interest as an organization, as a profession, as a country.

Fazal: There's a myth, almost a fear, that engaging in D&I work means there's one right way to do things, and I can't make mistakes. And if I do, I'm going to be called out, I'm racist. To me, D&I is all about making mistakes, and the value is actually learning, not necessarily getting it right.

Unger: One of the fair criticisms of DEI is that it has approached this work with shame, with a sense of blame that has had a chilling effect. Diversity is a fact, not a goal. The world is full of difference. So empower leaders to lead in a way that attracts people to your organization, that keeps them and gives you strategic advantage in the marketplace.

MEET THE PANELISTS

Karen O'Connor,
Partner
Stoel Rives LLP

Karen O'Connor is a partner at Stoel Rives LLP with 25+ years of experience advising employers in all aspects of labor and employment law. She counsels clients and litigates cases on a range of complex issues and finds innovative and practical business solutions. A respected employment law authority, Karen speaks and publishes extensively, is a specialist on Oregon's new paid leave law, and has taught in the human resources program at Portland State University. She also leads the firm's Diversity, Inclusion and Equity Committee, which works closely with the Move the Needle Fund to improve diversity in law firms.

Hanif Fazal
Founding Partner
Center for Equity & Inclusion;
Author
An Other World

Hanif Fazal brings an extensive track record spanning two decades in guiding equity and inclusion processes within corporate, governmental, philanthropic, and non-profit sectors. As Co-founder and Managing Partner of the Center for Equity and Inclusion, he has been instrumental in driving transformative change. Known for his compelling authenticity and deep knowledge of diversity, equity, and inclusion, he is a sought after keynote speaker and facilitator. His inaugural publication, "An Other World," stands as a testament to his unwavering commitment to advancing discourse on crucial societal matters.
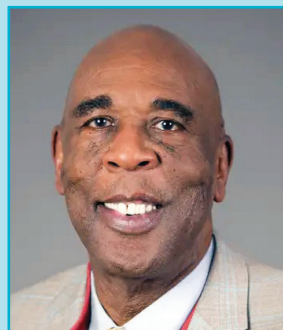
Dr. James Mason
Chief Equity and Inclusion Officer
Care Oregon

James is the former chief diversity officer for Providence Health and Services in the Oregon region, and directed the Office of Multicultural Health for the State of Oregon. He was one of the inaugural founders of the National Association of State Offices of Minority Health. He was also a senior consultant and original member of the National Center on Cultural Competence at Georgetown University. He has consulted with health systems, professional schools and programs, and related health and human service organizations in the United States, Latin America, and Canada.

April Allen and Shawna Unger
Co-founders and Principal Consultants, Allen and Unger Consulting

April Allen and Shawna Unger are co-founders and principal consultants of Allen and Unger Consulting, a DEI consulting firm. April has led DEI in healthcare, technology, and non-profits, holding a JD from UC Hastings and an MPA from the University of Washington. Shawna, an HR executive with over 20 years of experience in talent development and leadership across sectors like healthcare and aerospace, holds a Master's from Trinity Western University and is a certified SHRM Equity & Inclusion Workplace practitioner.