

Effective Training and Approaches for Command Teams' Leaders: Management of MEO, EEO, and DEI Programs



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Contents

Training for Senior Leaders on EO, EEO, and D&I.....	4
Overview.....	4
Alignment with DoD Initiatives.....	4
General Leader Expectations	6
Service-specific Leader Expectations	8
Leadership Theories.....	15
Toxic Leadership	16
Strategic Leadership.....	17
Transactional and Transformational Leadership	19
Servant Leadership.....	25
Inclusive Leadership.....	26
Motivational Strategies	29
Diversity, Equity, and Inclusion in DEI Training.....	31
Key Features of Effective DEI Training.....	31
Diversity Ideological Approaches.....	33
Implicit Bias Reduction	36
DEI Initiatives, Goals, and Best Practices	40
Leadership Development	43
Leadership Development in Academic and Industrial Settings.....	44
Justification for Military Leadership Development.....	45
Training, Education, & Instruction	46
Content Experts.....	46
Stages of Leadership.....	47
Modality: Length	48
Modality: Delivery.....	49
Adult Learning Theories and General Instructional Strategies.....	50
Conclusion	54
References.....	55
Activity Appendix.....	85
Setting Expectations for the Seminar.....	85
Transformational Leadership Case Vignette for Small Group Discussion.....	86
In-Group, Out-Group, and Affinity Bias Activities.....	88
Systemic Discrimination Awareness Activity	92
Exploration of Feelings of Inclusion versus Exclusion	95
Developing Anti-Prejudice Strategies Activity	97

Training for Senior Leaders on EO, EEO, and D&I

Overview

This document outlines strategies on training senior leaders in the DoD on equal opportunity (EO), equal employment opportunity (EEO), and diversity and inclusion (D&I). It presents how these efforts align with the DoD's overall effort to promote diversity and inclusion in order to achieve greater thought diversity among Service members. Leadership theories that can inform approaches to senior leader training are also presented. When training senior leaders, an important consideration should be to provide these experienced decision makers with highly relevant materials that are motivating and engaging. Lastly, rationales for delivery of training are provided to include pertinent information on suitable content, modalities, and adult learning principles.

Alignment with DoD Initiatives

The U.S. Secretary of Defense issued a memorandum, *Immediate Actions to Address Diversity and Inclusion and Equal Opportunity in the Military Services*, dated July 14, 2020, specifying that “addressing racial prejudice and bias within the force requires a combination of ongoing skill development, leadership, and accountability” (Esper, 2020, p. 2). The memorandum directed training for commanders to conduct relevant, candid, and effective conversations as a specific initiative against discrimination, prejudice, and bias, and as part of a broader approach to promote morale, cohesion, and readiness of the force.

Department of Defense Instruction (DoDI) 1020.05, *DoD Diversity and Inclusion Management Program*, issued on September 9, 2020, mandates a Diversity and Inclusion Management Program to accomplish the following: 1) promote a diverse workforce, 2) promote an inclusive culture, and 3) use data to evaluate the effectiveness of the program. DoDI 1020.05

further requires training to incorporate appropriate D& I messaging that emphasizes the importance of a workforce with diverse backgrounds, perspectives, and expertise to best address complex global security challenges. Training should equip leaders to create an inclusive work environment so that “the DoD can achieve greater strategic advantages against adversaries by leveraging the background and thought diversity of all personnel” (DoDI 1020.05, p. 12).

DoDI 1350.02, *DoD Military Equal Opportunity Program*, was reissued on September 24, 2020, and requires that leaders at all levels foster a climate of inclusion that supports diversity and is free from prohibited discrimination. DoDI 1350.02 specifically calls for training on toxic leadership to include an emphasis on how negative behaviors can affect command climate. DoDI 1350.02 further requires training on leadership accountability and oversight framework while charging senior leaders with the responsibility to assess and improve their command climates to ensure a diversity-supportive climate of inclusion.

DoDI 1020.03, *Harassment Prevention and Response in the Armed Forces*, dated December 29 2020, states “DoD will hold leaders at all levels appropriately accountable for fostering a climate of inclusion that supports diversity, is free from harassment, and does not tolerate retaliation against those filing harassment complaints” (p. 3).

Chairman of the Joint Chiefs of Staff Instruction (CJCSI) 1800.01F, *Officer Professional Military Instruction Policy*, issued on May 15, 2020, contains revisions to the Joint Professional Military Education Policy (JPME) that emphasize strategic thinking and ethical decision making as desired leader attributes (DLAs). Specifically, CJCSI 1800.01F further describes ethical decisions as being based on shared values of the profession of arms marked by the ability to evaluate alternative perspectives while distinguishing reliable from unreliable information to form reasoned decisions.

The Department of Defense Directive (DoDD) 1403.03, *The Career Lifecycle Management of the Senior Executive Service Leaders Within the Department of Defense*, dated October 25, 2007, notes that the DoD is responsible for senior executive service leadership development to include topics such as global assessments, leadership proficiency, recruitment, and diversity. Additionally, DoDI 1430.16, *Growing Civilian Leaders*, issued on August 23, 2022, emphasizes the DoD's need to develop, assess, and invest in civilian leadership through leadership education, training, and development.

According to Holt & Davis (2022), diversity and inclusion are essential in ensuring the Army's cognitive diversity to meet the demands of complex and ambiguous war environments. Research has shown that even with D&I training throughout an entire organization, change will only occur if adjustments are made to the organizational climate, and these changes need to start with the top levels of leadership by establishing leadership accountability (Prieto et al., 2016). Providing evidence-based leadership development can help leaders cultivate and ensure a culture of diversity and inclusion in their respective units. Research shows the importance of senior leaders possessing strong leadership skills, to include exercising good judgment and responsibility, in order to motivate and mentor other members (Hanser et al., 2008). Additionally, senior leaders need to ensure that mission alignment takes place in order to see a return on investment with regard to diversity and inclusion.

General Leader Expectations

Leadership can have a profound impact on military missions (Department of the Air Force, 2011a). Research (e.g., Lipman-Blumen 2005, 2010) has shown that career officers value leadership perception, work facilitation, intellectual stimulation, and individualized consideration in their leaders. Therefore, a balance must be maintained between short-term mission

requirements and the health and development of followers, the organization, and climate in the long-term. In essence, the U.S. military needs both people-focused leaders and task-oriented leaders (Fernandez de Bobadilla Lorenzo et al., 2017).

The concept of a good leader goes beyond mission and task-oriented requirements. For example, research shows that effective diversity management from leadership is associated with higher organizational performance (Choi & Rainey, 2010). Moreover, “effective responses [to EO complaints] from the chain of command are associated with decreased emotional distress and increased retention intentions” (Daniel et al., 2019, p. 367). Therefore, top levels of leadership need to establish leadership accountability in order to make organizational climate changes and adjustments (Prieto et al., 2016).

Senior leaders are the strategic decision makers in the DoD and have a direct impact on unit cohesion, mission effectiveness, and total force readiness. Senior leaders are expected to increase accurate decision-making, promote fair and equitable policies in commands, promote fair and equitable Uniform Code of Military Justice (UCMJ) actions, and enhance cross-cultural operational strategy. Senior leaders are further expected to acquire strategies that assist them in their commitment to fair and equitable leadership, ultimately reflected in their decision and policy making with the overall goal of maximizing cognitive diversity and, thereby, total force readiness across the DoD. Beyond these general expectations for senior leaders, policy also outlines service-specific expectations for senior leaders’ involvement in their respective Service’s efforts to create a pro-diversity climate.

Service-specific Leader Expectations

The following section provides an overview of Service-specific definitions of and expectations for leadership to include perspectives on diversity and inclusion, mentoring efforts, and ongoing leadership development.

Army (USA).

Leadership. The Army defines leadership as the activity of influencing people by providing purpose, direction, and motivation to accomplish the mission and improve the organization (ADP 6-22). APD 6-22 describes the leader core competencies as lead, develop, achieve. APD 6-22 further outlines that leading includes several associated tasks: provision of purpose, direction, and motivation, trust building, setting an example, and communication. Developing includes development of self and others, creation of a positive climate, as well as professional stewardship. Achieving includes execution, adjustments, and accomplishing tasks and missions on time and to standard. APD 6-22 identifies influence as the essential activity of leadership and views influence as relying on positive rapport and mutual trust in the relationship between leader and others. ADP 6-22 also notes that leaders need to have character, presence, and intellect (Department of the Army, 2019).

The Army provides extensive doctrine and policy on leadership as it views leadership as a combat power. Relevant policies include: ADP 6-22 Army Leadership and the Profession; FM 6-22 Leader Development; ATP 6-22.1 The Counselling Process; ATP 6-22.6 Army Team Building; ADRP 7-0. Training Units and Developing Leader; and Army Leader Development Strategy (ALDS).

The Army defines professional development and education as a deliberate, continuous cycle of “education, assessment, and feedback” (Department of the Army, 2017, p. 5). The

Army requires Soldiers and civilians to attend training and education in order to develop their careers (Department of the Army, 2017). Moreover, individuals can continue to develop and achieve professional certifications through the Army's career management, training programs, and talent management initiatives (Department of the Army, 2017).

Diversity and Inclusion. The Army endorses the ideology that “training should center on building trust, developing leaders who value differences, treating diverse individuals equitably, helping Soldiers and civilians understand their potential biases, and creating shared understanding through open, two-way communication” (United States Army, 2020, p.12). The Army provides an inclusive leader development program that “ensures all Soldiers and civilians trust their leaders and have the access and opportunities to fulfill their professional aspirations and defined ideals of success” (United States Army, 2020, p. 5).

Mentoring. The Army emphasizes that all leaders are responsible for developing and facilitating junior development through counseling, coaching, and mentoring (Department of the Army, 2017). The Army selects individuals based upon their documented talents and potential (Department of the Army, 2017).

Air Force (USAF).

Leadership. The Air Force defines leadership as “the art and science of motivating, influencing and directing Airmen to understand and accomplish joint force commander (JCF) objectives” while emphasizing that effective leadership transforms human potential into effective performance (AFDP-1, p. 14). According to Air Force Instruction (AFI) 1-1.32, successful commanders should lead by personal example, pay careful attention to the welfare and morale of their Airmen, and establish and maintain a healthy command climate that fosters good order, discipline, teamwork, cohesion, and trust (Air Force, 2014). The Air Force ensures that

education (synchronous and asynchronous) is provided to meet the needs of current Airmen (United States Air Force, 2022).

Diversity and Inclusion. Among the Air Force's core principles of mission command are team building through mutual trust and the creation of a shared understanding of the operational environment (AFDP-1). A diversity-supportive climate of inclusion supports team building through trust and enhances mutual understanding. The Air Force notes that individuals should be "able to recognize and work through their own biases" (The Inspector General Department of the Air Force, 2020, p. 106). The Air Force wants "inclusive leaders [to] build Air Force organizations, which are more capable of incorporating different ways of thinking and performing, integrating functional cultures, and combining work methodologies for more innovative, effective results" (Department of the Air Force, 2019, p. 21). Moreover, inclusive Air Force leaders can "function more effectively in cross-cultural settings to produce better operational outcomes" (Department of the Air Force, 2019, p. 21).

Mentoring. The Air Force Mentoring Program highlights that "mentoring is an essential ingredient in developing well-rounded, professional, and competent future leaders. The overall goal of mentoring is to help Airmen (civilian, enlisted, and officer) maximize their full potential" (Department of the Air Force, 2019, p. 3). Additionally, AFI 1-2 notes that mentoring is an inherent responsibility of leadership (Department of the Air Force, 2014). The Air Force enlisted Force development action plan 2022-2023 focuses on modernizing talent management systems to include feedback methods that center around coaching, mentoring, and developing Airmen from the beginning of their careers (U.S. Air Force, 2022). For example, leaders are to understand the programs and policies that support their organizations' personnel in addition to

improving the work environment to aid in the growth of Airmen (Department of the Air Force, 2019).

Navy (USN).

Leadership. The Navy defines leadership as “the act of accomplishing the Navy's mission through people” (Navy Credentialing Opportunities Online, 2022). Moreover, the Navy emphasizes that a fully-developed approach to leadership “must recognize the value of both compliance and creativity” (NLDF 3.0, p. 6). This approach stresses the importance of acquiring a solid knowledge base of trade-relevant skills that subsequently allows personnel to improvise safely with compliance preceding creativity (NLDF 3.0). Navy leaders are tasked with ensuring compliance while fostering creativity.

Diversity and Inclusion. The Navy “values diversity, equality, and inclusivity – striving to build a community of Service members who accurately reflect the rich makeup of [the United States]” (Navy Recruiting Command, 2022). The Navy created a task force to combat bias, which aims to enhance understanding of bias with an emphasis on larger scale outcomes (U.S. Navy, 2020). The Navy offers training and education that focuses on objective skills and performance, across the entire level, from entry level to executive levels (United States Navy, n.d.). The Navy believes that inclusive leadership is the secret weapon of the Navy’s best leaders (My Navy HR, 2019).

Mentoring. The Navy recognizes that mentoring can be both formal or informal and that anyone can serve informally as a mentor in their command or community (e.g., MyNavy HR, n.d.). Moreover, the Navy views mentoring as most effective when there is a voluntary relationship between a Sailor and an experienced superior. The Navy talent management system focuses on “increased confidence and transparency in the talent management process” (U.S.

Navy, n.d., p. 23). For example, the Navy has implemented objective-based performance evaluations as a means to eliminate bias and reduce subjectivity (U.S. Navy, n.d.).

Coaching. The Navy also emphasizes coaching as a leadership development skill consisting of active listening, empathy, and asking powerful questions. Coaching facilitates open, honest, and respectful communication among all levels of the organizational hierarchy. Coaching hereby provides bi-directional feedback and collaborative communication in order to foster individual growth and performance, ultimately enhancing warfighting capability and Navy lethality. In contrast to mentoring, which centers around a senior subject matter expert guiding a less experienced sailor, coaching is a joint learning approach geared at developing self-awareness with the strategic goal of attracting and retaining the best talent across the Navy through a culture of feedback (MyNavy HR, 2022).

Marine Corps (USMC).

Leadership. MCDP 6 (updated 2018) *Command and Control* defines leadership as “the influencing of people to work toward the accomplishment of a common objective” (pp. 2-20).

Diversity and Inclusion. The Marine Corps holds the belief that “an individual does not automatically set aside prejudices, bias, and perceptions upon joining our ranks. In order to address such bias [they] must be pro-active; [they] must establish a command climate that allows every Marine to reach his or her potential without regard to race, color, religion, sex, age, sexual orientation, or national origin” (U.S. Marine Corps, n.d., p. 4). The talent management system of the Marine Corps focuses on creating an equal opportunity for success and talent (Department of the Navy, 2021). Moreover, the talent management system requires leadership to build inclusive teams (Department of the Navy, 2021).

Mentoring. The Marine Corps requires all Marines to be mentored by a senior Marine in their chain of command. In order to be an effective mentor, *NAVMC Directive 1500.58* notes that there must be a course of action for developing a mentor partnership, and evaluations must be made on the effectiveness of said mentorship (Department of the Navy, 2013). Marine Corps commanders have the ability to “highlight and prioritize the specific professional and educational backgrounds they seek in their key leaders, detail billet descriptions and expectations, and articulate their command philosophies, family readiness priorities, and other information that might be useful to potential applicants, facilitating a much better match between Marine and commander” (Department of the Navy, 2021, p. 10).

Coaching. *Marine Corps Order 1500.61, Marine Leader Development*, stresses coaching as an ongoing process of observation and encouragement that aims to enhance Marine’s personal and professional growth via informal feedback. Coaching is viewed as a leadership skill that both encourages and demands output in order to draw greater performance from individuals and teams, thereby exceeding what they thought they were capable of (Department of the Navy, 2017).

Space Force (USSF). The U.S. Space Force was founded on December 19, 2020 and is actively developing its doctrine and policies. Nevertheless, the Space Force has committed to focus its recruitment efforts on those groups who have historically not been inclined to join the Service (Maucione, 2021). According to the Space Capstone Publication, *Spacepower* (SCP), it falls on leaders to establish the purpose and identity of the U.S. Space Force by instilling a unique vision, ethos, and values; leaders must balance mission execution and warfighter readiness which requires leaders to be “intimately familiar with the strengths, weaknesses, and organizational climate of the forces under their care” (p. 55). SCP further emphasizes that

leadership is instrumental in influencing organizational culture, while adding that a stable culture can only flourish once the Space Force's organizational purpose and identify are fully understood and accepted (United States Space Force, 2020).

Coast Guard (USCG).

Leadership. The Coast Guard (2006) defines leadership as follows: “You influencing others to achieve a goal” (p. 7). The Coast Guard provides professional development and educational experiences in critical areas (United States Coast Guard, 2022).

Diversity and Inclusion. The Coast Guard aims for the work environment to be free from discrimination and harassment of any kind (U.S. Department of Homeland Security, 2020). The Coast Guard provides a Leadership Inclusion and Diversity Advisory Council (LIDAC), which promotes key ambassadors in the achievement towards inclusivity, as described below:

The LIDACs are responsible for assisting their command cadre in cultivating a culture of inclusion by monitoring the command climate and promoting leadership development and diversity initiatives that create and help sustain an environment of equal opportunity for all members and a workplace free of discrimination. (U.S. Department of Homeland Security, 2020, pp. 3-4)

Mentoring. The Coast Guard provides professional and mentorship support through the use of mentoring programs (U.S. Department of Homeland Security, 2020). Through mentorship, Coast Guard members can have successful long-term relationships that promote employee development (United States Coast Guard, n.d.). In fact, the Coast Guard finds mentorship to be one of the 28 leadership competencies. The Coast Guard's talent management system aims to “increase member opportunity while also improving recruitment and retention of

those members with vital experience needed for mission success” (United States Coast Guard, 2022, p. 21)

Leadership Theories

The following section provides an overview of leadership theories pertinent to the training and leadership development of senior leaders across the DoD. Leadership models that can inform efforts to create an inclusive, diversity-supportive command climate are presented, beginning with a discussion of how to avoid counterproductive behaviors, such as toxic leadership. Ruiz Moreno et al. (2021) caution against adopting a single leadership style, recommending that leaders must be adaptable to meet the demands of modern military decision making in a complex and dynamic war environment. Effective leaders may embody several common leadership types (NCO Journal Staff, 2018) depending on situational, task, and mission demands.

The leadership styles presented in this section (e.g., transformational, servant, and inclusive leadership) are largely democratic in nature. Democratic leadership empowers followers and involves stakeholders in decision making (Mazurek, 2022). In contrast, autocratic leadership dictates directions, missions, and goals without input from others (NCO Journal Staff, 2018), and bureaucratic leadership focuses on rules and regulations in a top-down approach (Mazurek, 2022). It’s important to note that individuals who embody autocratic leadership or bureaucratic leadership typically have full authority as a leader (e.g., Pigeau & McCann, 2000). While military leaders at times need full authority, democratic approaches can aid in empowering minority Service members in an inclusive manner.

Toxic Leadership

Toxic leadership is a multidimensional construct (e.g., Dobbs & Do, 2019) that can be defined by three core areas: a toxic leader will display repeated negative systemic attributes and behaviors; the followers and the organization, to include the climate and goals, are negatively affected by the toxic leader; and the overall organizational environment(s) may reinforce toxic leadership (e.g., Babos & Rusu, 2020; Fernandez de Bobadilla Lorenzo et al., 2017; Lipman-Blumen, 2010). Padilla et al. (2007) further stress that leaders, environments, and followers, all play a role in toxic leadership. Overall, toxic leadership is a complex process of influence occurring in a conducive environment between susceptible followers and flawed, toxic, or ineffective leaders. As it unfolds over time, toxic leadership culminates in destructive group or organizational outcomes that compromise the quality of life for internal and external constituents and detract from their group-focused goals or purposes (Thoroughgood et al., 2018, 2021).

Incompatibility with Core Service Values. While the DoD has not published an official definition for toxic leadership, toxic leadership is incompatible with the DoD's primary ethical values as outlined in Reg. 5500.07, pp. 12-401: Honesty, Integrity, Loyalty, Accountability, Fairness, Caring, Respect, Promise-Keeping, Responsible Citizenship, and Pursuit of Excellence. For example, the Army defines leadership as the activity of influencing people by providing purpose, direction, and motivation to accomplish the mission and improve the organization (ADRP 6-22). Army Regulation 600-100 emphasizes that destructive leadership styles can not only compromise organizational effectiveness and discourage Soldiers from continuing their service, they also undermine trust and impede mission accomplishment. The Army further describes toxic leadership as a combination of self-centered attitudes, motivations, and behaviors that have adverse effects on Soldiers, the organization, and mission performance (AR 600-100).

Particularly in the military, where flexibility, creative thinking, and retention are essential, the effects of toxic leadership have a negative impact on readiness and effectiveness (Fernandez de Bobadilla Lorenzo et al., 2017). Toxic leadership behaviors have a pervasive, consistent, and highly interrelated effect on organizational success at large, hereby impacting every measurable dimension of performance (e.g., Anderson, 2019; Akca, 2017; Babos & Rusu, 2020; Padilla et al., 2007). To avoid toxic leadership patterns, leader behavior should be informed by leadership models that can guide constructive, transformative, and inclusive leader behavior. Hereby, it is important to keep in mind that senior leaders are also tasked with the design and implementation of strategic efforts to create pro-diversity-oriented command climates.

Strategic Leadership

Strategic leadership is defined as the functions performed by individuals at the top levels of an organization with the intent to have strategic consequences for the organization (Samimi et al., 2022). With regard to the DoD's inclusion and diversity goals, it falls on the DoD's senior leaders to plan strategically in order to develop and implement the appropriate policies.

Strategic Leadership Behaviors. Samimi et al. (2022) identify eight functions of strategic leadership:

- Making strategic decisions
- Engaging with external stake holders
- Performing activities related to human resources management
- Motivating and influencing others in and outside of the organization
- Providing information management
- Providing operational oversight and administration

- Managing social and ethical issues
- Managing conflicting demands
- Challenging the process

Senior leaders in the DoD have the opportunity to influence their respective organizations through the decisions they make, thereby directly impacting major allocation of resources and commitments with lasting implications for the organization (Wang et al., 2016). Strategic thinking is crucial when addressing issues around EO, EEO, and D&I in military settings.

Strategic Thinking. Senior leaders must use strategic thinking in the development and implementation of diversity- and inclusion-oriented leadership accountability frameworks. In doing so, senior leaders formulate objectives and priorities, and implement plans consistent with the long-term interests of the organization in a global environment by evaluating conditions, resources, barriers, and organizational goals and values (e.g., Corley, 2020). Senior leaders hereby capitalize on opportunities while managing risk and contingencies and while recognizing the implications for the organization (Defense Civilian Personnel Advisory Service, 2022).

Strategic Leaders in the Military. The Army notes that strategic leaders are to allocate resources and communicate strategy to prepare themselves and their commands for future missions. Strategic leaders must ensure their directives, policies, programs, and systems are not only effective and efficient but also ethical. Strategic leaders' decisions affect the entire Army, and it is crucial that organizational leaders endorse the Army's long-term strategic vision while ensuring this vision reaches the entire Army (ADP 6-22). The Coast Guard (2006) also views strategic planning as a vital leadership function, as discussed below.

Defining the strategy is inherently a leadership responsibility. While action planning can be jointly accomplished by organizational leaders and front-line teams, Coast Guard leaders

cannot delegate strategy development. Developing strategy encompasses defining outcomes from the stakeholders' perspective, identifying critical success factors, and developing goals for an 18- to 36-month time horizon. These strategic plan elements lay the groundwork for all strategic activities within the command (p. 21). Strategic leadership is emphasized across the DoD, and its principles need to be applied to diversity and inclusion efforts.

Transactional and Transformational Leadership

Transactional versus Transformational Leadership. Transactional leadership focuses on exchanges between leaders and followers (Northouse, 2016). Transactional leadership is based on structure, results, rewards, and penalties, whereas transformational leadership relies on leading by example and focuses on pushing followers into a growth mindset (e.g., Mazurek, 2022; NCO Journal Staff, 2018). While most leadership models have an inherent transactional component (Northouse, 2016), transformational leadership adds a motivational dimension as it emphasizes leading by inspiring followers' and fostering followers' intrinsic motivation and growth. Senior leaders should combine both transactional and transformational leadership approaches when promoting diversity and inclusion in their organizations.

Transformational and transactional leadership have been shown to increase follower sense of self-efficacy (Liu & Gumah, 2020), and may both be useful strategies in the creation of constructive feedback. Lowe et al. (1996) conducted a meta-analysis of 39 transformational leadership studies finding that leaders who exhibited transformational leadership were viewed as more effective and having better work outcomes as opposed to those engaging in transactional leadership alone.

Transformational Leadership. Experts have defined transformational leadership as follows:

Transformational leadership is the process whereby a person engages with others and creates a connection that raises the level of motivation and morality in both the leader and the follower. This type of leader is attentive to the needs and motives of followers and tries to help followers reach their fullest potential. (Northouse, 2016, p. 162)

Bass and Riggio (2005) also provide a description of transformational leaders:

“Transformational leaders help followers grow and develop into leaders by responding to individual followers’ needs by empowering them and by aligning the objectives and goals of the individual followers, the leader, the group, and the larger organization” (p. 3).

Key Features of Transformational Leadership. According to Bass (1985), transformational leadership motivates followers go beyond what is expected by doing the following:

- Raising followers’ level of consciousness about the value and importance of specified goals
- Getting followers to transcend their own self-interest for the sake of the unit or organization
- Moving followers to address higher level needs

Transformational leadership focuses on how leaders can inspire followers to accomplish great things while emphasizing that leaders must understand and adapt to the needs and motives of followers. A transformational leader is a role model and change agent who is able to create a clear vision for an organization and who inspires others to meet higher standards by giving meaning to organizational life (Northouse, 2019). The transformational leadership approach has received extensive research attention (Hodos Institute, 2013; Northouse, 2019).

Transformational Leadership Behaviors. Bass and Avolio (1990) outline four transformational leadership behaviors:

- **Idealized influence:** Leaders' idealized influence depends on an attributional component, the attributions followers make about leaders, and a behavioral component, followers' observations of leader behavior. Riggio describes this behavior as leaders' ability to be a positive role model; the leader walks the talk (Hodos Institute, 2013).
- **Inspirational motivation:** Leaders communicate high expectations and inspire followers through motivation to become committed to shared visions in the organization.
- **Intellectual stimulation:** Leaders stimulate followers to be creative and develop innovative ways of dealing with organizational issues while engaging in careful problem solving.
- **Individualized consideration:** Leaders provide a supportive climate by carefully listening to the needs of the follower. Leaders assist followers in actualizing their full potential and may use delegation to provide followers with personal growth opportunities. Individualized consideration describes leaders' ability to connect with each follower, be in tune with followers' needs, and draw out followers' strength (Hodos Institute, 2013).

Kouzes and Posner (1987; 2002) propose a similar model that lists five practices that enable leaders to accomplish extraordinary things. The model focuses on behavioral strategies for the practice of exemplary leadership, and each of the five practices has two associated commitments that provide behavioral guidelines. Effective leadership is thought of as the result of practice, not innate leader personality characteristics.

- **Model the way:** Leaders set an example by their own behaviors. They follow through on commitments and uphold the common values shared with others.

- Inspire a shared vision: Leaders create compelling visions of positive outcomes and communicate them to others. They listen to others' dreams and show them how these dreams can be realized.
- Challenge the process: Leaders are like pioneers, willing to innovate, grow, and improve. Leaders take calculated risks and learn from mistakes as they go.
- Enable others to act: Leaders build trust and promote collaboration. Leaders listen closely to diverse view points and treat others with dignity and respect. They create environments that allow others to feel positive about their contribution towards greater goals.
- Encourage the heart: Leaders reward others by providing support and recognition for their accomplishments. Leaders use authentic celebrations and rituals to show appreciation and encouragement, thereby supporting a greater collective identity and community spirit.

Impact of Transformational Leadership. Transformational leadership has been shown to be beneficial in organizational as well as military settings, as discussed below.

Organizational Impact. Organizational transformational culture is characterized by a shared sense of purpose, long-term commitment, and interdependence. Leaders who act as role models and mentors socialize members into the culture while emphasizing organizational purposes, visions, and missions. A wide range of behavior is covered by shared norms. Challenges are viewed as opportunities, not threats. Leaders and followers transcend their own self-interest or expected rewards for the good of the team and ultimately the organization. Transformational organizational cultures are associated with quality improvement (Bass & Riggio, 2005). A transformational leadership style that conveys both a sense of trust and meaningfulness, while

challenging and developing employees, has a positive effect on employee wellbeing (Jacobs et al., 2013). Employees from a large, multinational firm undergoing a merger showed increased acquisition acceptance, job satisfaction, and performance in response to transformational leadership behaviors such as idealized influence, inspirational motivation, individualized consideration, and intellectual stimulation (Nemanich & Keller, 2007).

Military Impact. Transformational leadership has been studied extensively within various military populations. For example, transformational leadership has been shown to foster organizational citizenship behavior and achievement motivation while protecting recruits from stress, both cross-sectionally as well as longitudinally (Sefidan et al., 2021). Transformational leadership can create a positive impact on squads' group potency (García-Guiu et al., 2016). Additionally, transformational leadership has been shown to mediate the relationship between dissatisfaction with compensation and intention to leave an employer, suggesting that transformational leadership could improve retention (Shabane et al., 2017). Moreover, transformational leadership can transcend disciplines and result in higher achievement outcomes (e.g., Kovach, 2019). For example, in a study investigating Air Force's officers' leadership styles and associated ways of coping, transformational leaders utilized more problem-focused and less emotion-focused coping strategies (Alarcon et al., 2012) suggesting transformational leadership may be more beneficial to problem solving.

Research indicates that transformational leadership behaviors (fostering acceptance of group goals, inspirational motivation, being appropriate role models, individual consideration, and providing contingent rewards) can engage recruits to complete training (Hardy et al., 2010). Additionally, provision of a transformational leadership intervention demonstrated that transformational leadership behaviors were significantly enhanced by the intervention (Hardy et

al., 2010), suggesting that transformational leader behavior can be learned and practiced. Transformational leadership behavior among senior Norwegian military officers predicted indicators of operational readiness such as situational awareness and interpersonal influence (Eid et al., 2004). Among Latvian soldiers, commanders' transformational leadership predicted soldiers' social identification with their unit, with emotional intelligence mediating this relationship (Rozčenkova & Dimdiņš, 2011). In a longitudinal, randomized field experiment, infantry cadets in the Israel Defense Forces (IDF) who received transformational leadership training had a more positive impact on followers' development and performance than those who received eclectic leadership training (Dvir et al., 2002). Ivey and Kline (2010) recommend the use of transformational leadership across military leader levels due to transformational leaderships' positive impact on job satisfaction and attitudes towards supervisors.

With the contemporary security environment increasing in complexity, there is a need for transformational military leadership with leaders operating from a post-conventional level of developmental action logic (Smiljanic, 2016). Leaders who are able to initiate and lead transformational change throughout their organization are better prepared to respond adaptively to complex security challenges (Smiljanic, 2016). Research from the past four decades suggests that transformational leadership is the most effective leadership style when it comes to influencing both the development and performance of followers in cooperate, military, educational, and religious settings (Bass, 2008; Sosik & Jung, 2018). Sosik et al. (2018) argue that transformational leadership is essential to fully develop military members in ethical ways. Military leaders should engage in transformational leadership behaviors such as inspiring others, modeling ethical behaviors, sparking innovation, and developing the strengths and talents of followers (Sosik et al., 2018).

Servant Leadership

Greenleaf (1970) defines servant leadership as follows:

The servant-leader is servant first... It begins with the natural feeling that one wants to serve, to serve first. Then conscious choice brings one to aspire to lead. That person is sharply different from one who is leader first, perhaps because of the need to assuage an unusual power drive or to acquire material possessions... The leader-first and the servant-first are two extreme types. Between them there are shadings and blends that are part of the infinite variety of human nature. (p. 15)

Servant leadership focuses on meeting the needs of squads or teams (NCO Journal Staff, 2018), while emphasizing mentoring direct reports through model behaviors (Hurwitz & Hurwitz, 2015).

Key Features of Servant Leadership. The following are hallmark characteristics of servant leadership:

- Servant leaders place the wellbeing and needs of followers over their own self-interests while emphasizing follower development (Hale & Fields, 2007).
- Servant leaders demonstrate strong moral character and behavior towards followers (Graham, 1991; Walumbwa et al., 2010).
- Servant leaders share power and empower others to perform to their full potential (Greenleaf Center for Servant Leadership, 2021).
- Servant leadership is a set of behaviors that can be acquired (Northouse, 2016; Spears, 2010).

Servant Leadership Behaviors. Servant leadership behaviors include empowering and developing others by expressing interpersonal acceptance, authenticity, and humility (Van

Dierendonck, 2011). Servant leadership focuses on meeting the needs of squads or teams (NCO Journal Staff, 2018), which similarly models followership, which emphasizes mentoring direct reports through model behaviors (Hurwitz & Hurwitz, 2015). Servant leaders prioritize the needs of others over their own self-interests (Hale & Fields, 2007). Servant leaders demonstrate strong moral behavior towards followers and stakeholders within and outside of the organization (Ehrhart, 2004).

Servant Leadership in the Military. Servant leadership has a positive impact on followers' behavior in military settings (Ruiz Moreno et al., 2021). Although servant leadership could seem contrary to a traditional hierarchical structure, the military setting is already moving away from a focus on control to a focus on greater support function, which is highly compatible with servant leadership (Bjørnstad and Lichacz, 2013). Yardley and Neal (2007) emphasize that military contexts require that individuals strongly identify with their team and subjugate their own needs to the greater good, which requires servant leadership. Ruiz Moreno et al. (2021) recommend that military leaders be trained in servant leadership.

Inclusive Leadership

A framework that can inform leadership accountability as it relates to D&I is inclusive leadership. Inclusive leadership means fully adopting the lens and practice of inclusion (Ferdman & Deane, 2014a) in a manner that transforms mindsets, behaviors, and collective practices to fully benefit from our many differences (Ferdman et al., 2020). In the human resource literature, the term inclusive leadership is defined by Shore et al. (2011) as “the degree to which an employee perceives that he or she is an esteemed member of the work group through experiencing treatment that satisfies his or her needs for belongingness and uniqueness” (p. 1265).

Inclusive military leadership develops and implements a strategic accountability framework that is based on the needs of the DoD. Senior leaders who embody inclusive leadership can identify the needed conditions for systemic change, along with associated challenges and opportunities, and put those changes into practice. Inclusive leadership transcends cultural competence and management of diversity. Senior leaders are to create and foster conditions that make everyone feel psychologically safe, fairly treated, and appreciated so each unique team member can be and do their best (Ferdman et al., 2020).

Inclusive leadership in a diverse work environment is associated with a variety of positive outcomes such as empowerment (Hollander, 2009), psychologically safe work environments (Edmondson, 1999), and improved learning and performance (Hirak et al., 2012). Catalyst's (2021) report on inclusive leadership across 352 large corporations in the United States found that while inclusive experiences are beneficial for both employees and employers, fewer than half of employees reported experiences of inclusion. Among those who had positive experiences of inclusion at work, 52% attributed these experiences to their managers' inclusive leadership behavior. Leaders have the opportunity to provide inclusion experiences by engaging in inclusive leadership behavior.

Traditional leadership approaches often reinforce systemic, institutionalized beliefs that can be a barrier to truly inclusive environments. When working toward creating accountability around inclusion and diversity efforts, the associated accountability frameworks must be inclusive in nature and remain responsive to the needs of all stakeholders in the organization. Accountability systems should aim at creating a climate of psychological safety and trust that fosters a sense of diversity across the organization (Corley, 2020).

Key Features of Inclusive Leadership. Person et al. (2015) defines inclusion as having the following eight dimensions: purpose, trust, appreciation of individual attributes, sense of belonging, access to opportunity, equitable reward and recognition, cultural competence, and respect. Inclusive leadership addresses these dimensions as follows:

- Inclusive leadership is relationship-based with the leaders focusing on meeting the needs of employees and being available to employees (Hollander, 2009).
- Inclusive leaders are open, available, and accessible in their interactions with followers (Carmeli et al., 2010).
- Inclusive leadership promotes experiences of inclusion (Nishii & Leroy, 2022).
- Inclusive leadership ensures individuals can bring their full self to work and feel like they belong and are valued for their contributions (Ferdman, 2014).

Inclusive Leadership Behaviors. Ferdman (2020, pp. 19-20) recommends the following leadership behaviors while emphasizing that the overarching goals of inclusive leadership are to foster fairness and equity across multiple identities:

1. Hold yourself and others accountable for creating an inclusive culture.
2. Invite engagement and dialogue.
3. Model bringing one's whole self to work and give permission for and encourage others to do so.
4. Foster transparent decision-making.
5. Understand and engage with resistance.
6. Understand and talk about how inclusion connects to the mission and vision.

Inclusive Leadership in the Military. Although each branch of Service has their own definition of leadership, which involves influencing others to accomplish a mission (Malik,

2016), in order to be considered effective, individuals must be able to adapt their leadership style to meet mission, personnel, and environmental demands. Inclusion in military leadership might include such things as being sensitive to US citizenship status, finding blind spots, listening and engaging in dialogue, building the team, encouraging team collaboration, and providing recognition to team members when deserved (Gosby Smith, 2020). Inclusive leadership also involves a cross-cultural component, especially in missions overseas (Hajjar, 2010; Masakowski, 2017). Cross-cultural competency as a component of inclusive leadership is required for an effective military force to 1) ensure a cohesive force made up of diverse individuals from the United States and 2) develop military plans with an understanding of other cultures (Hajjar, 2010).

Motivational Strategies

One challenge to effecting change with regard to EO, EEO, and D&I efforts across the DoD lies in motivating individuals at all levels of the organizational hierarchy to become personally invested in change efforts. This section outlines motivational strategies that can be utilized to motivate senior leaders to engage more deeply when provided with relevant D&I training seminars. Senior leaders can also subsequently utilize these motivational approaches with their subordinates.

Alignment with Core Service Values and Mission Needs. With future war environments becoming increasingly ambiguous and complex, fostering diversity has become mission essential, as discussed below.

Future threats will blur the lines between competition and conflict, and physical and cognitive warfare. The volatile, uncertain, complex, and ambiguous environments of the future will require the Army to harness its collective cognitive diversity to achieve situational

awareness and create narratives of purpose. All will require flatter, highly innovative, and inclusive teams to integrate team capabilities and talents (Holt & Davis, p. 1).

Not only does the DoD's overall mission dictate the crucial importance of fully embracing EO, EEO, and D&I efforts, prejudice and discriminatory behavior are also fundamentally at odds with the DoD's primary ethical values: Honesty, Integrity, Loyalty, Accountability, Fairness, Caring, Respect, Promise-Keeping, Responsible Citizenship, and Pursuit of Excellence (Reg. 5500.07, pp. 12-401). These values are also reflected in the individual Service branches: E.g., one of the Army's seven core values is respect for self and others, which entails an appreciation of people and their cultural differences (Kusch, 2011). The Air Force identifies a culture that embraces diversity as essential: "We will vigorously develop and reinforce these attributes, emphasizing our Core values, the importance of dignity and respect in the workplace, and a true appreciation of the contributions of all Airmen to our mission" (United States Air Force, 2014, p. 12). These values dictate the fair and respectful treatment of each Service member and DoD civilian in order to ensure each individual can pursue excellence, individually, across units, and, ultimately, at the organizational level and beyond. Importantly, DEI initiatives and leadership that embrace an ethical and moral imperative for trainings and for diverse and inclusive leadership development inextricably aligns with the DoD's core ethical values, and such trainings and teams may be more effective than those with mere economic and performance justifications (Jones et al., 2013).

Perspective Taking. Results of a large body of research show that perspective taking – imagining the world / situations from another's point of view – reduces stereotyping and prejudice (Broockman & Kalla, 2016; Todd & Galinsky, 2014). Those who are trained to carefully imagine a situation from an outgroup member's perspective tend to show more

empathy, display to more positive attitudes about the outgroup overall (Vescio et al., 2003), are more likely to recognize the effects of discrimination (Todd et al., 2012), temporarily exhibit less implicit bias (Todd et al., 2016), and perform more positive behaviors for others (Shih, et al., 2009).

Diversity, Equity, and Inclusion in DEI Training

While there are no, as of yet, widely agreed upon standards for DEI training, there are a few promising signs pointing toward more and less effective practices. Effective practices may vary according to training objectives. Diversity trainings vary widely within and across settings, making it difficult to draw firm conclusions about their effectiveness. For example, a recent meta-analysis found that, overall, diversity training has a small, but positive association ($r = 0.19$) with organizations' desired outcomes (Berzrukova et al., 2016).

Key Features of Effective DEI Training

A number of factors are known to be associated with positive outcomes and some with negative unintended outcomes. These factors are reviewed below.

Mandatory versus Volunteer Participation. On the one hand, requiring training signals strong institutional and leadership support for diversity initiatives, and such norming and value placement on DEI is a key component in motivating change. On the other hand, one cannot motivate people to change through force and, thus, participation in mandatory trainings does not always improve attitudes toward diversity (Dobbin & Kalev, 2016). Voluntary training also has pitfalls. For example, if training is optional, the result can be that attendance is more likely for people who already support diversity initiatives – a “preaching to the choir” effect. In their meta-analysis, Bezrukova and colleagues (2016) found no overall difference between these two options. However, differences did emerge when the goals of the trainings were taken into

account. When the training focused on skill building, such as increasing self-awareness and monitoring one's thoughts and behaviors, mandatory trainings were more effective. When the training focused more on reactions to the trainer or program itself, volunteer attendance was more effective. In a recent LinkedIn [poll](#) with over 1,000 respondents, 84% were in favor of mandatory DEI trainings.

Organizational versus Educational Settings. DEI trainings tend to focus on different goals across workplace versus educational settings. Organizational diversity programs are often geared toward hiring, promotion, and mentoring in the workforce, whereas educational settings tend to emphasize awareness of biases and how those may affect those from underrepresented groups (Bowman, 2011). Regardless of these general goal differences, the effectiveness of trainings is similar between the two settings (Bezrukova, et al., 2016).

Diversity Literacy Training. Diversity trainings are effective, in part, by increasing participants' awareness of and ability to detect their own and others' prejudices (Monteith et al., 2019). Participants can then be trained to confront bias effectively. For example, role-playing can provide the opportunity to practice confronting someone's prejudicial statements. Monteith and colleagues (2019) suggest using questioning, direct challenges, or expressing surprise. These researchers also note one should avoid hostility, aggressiveness, threat, and extremity (H.A.T.E.) when confronting prejudicial responses. Research supports this advice by showing that when exposed to a calm confronter relative to a hostile one, people are more positive toward the calm confronter and report greater willingness to themselves respond to future prejudice (Martinez et al., 2017). Monteith and colleagues (2019) also suggest training participants to avoid using labels (e.g., "that's racist") and instead focus on specific behaviors (e.g., "that statement isn't fair to people who are gay or lesbian"). Finally, Monteith et al. (2019) suggest

being assertive – politely but firmly speaking up instead of relying on subtle nonverbal cues such as frowning or eye gaze. In summary, effective DEI trainings should, therefore, educate trainees on how to effectively respond to the prejudices they see and hear around them.

Other Factors. As noted previously, training that advances the recognition of and response to cues to prejudicial thoughts and responses, as well as those that practice and encourage perspective taking, may be particularly effective DEI training practices. Likewise, several other factors have been associated with positive outcomes in DEI training. For example, a recent meta-analysis (Bezrukova et al., 2016) showed that 1) training that focuses on one specific group appears as effective as training that focuses on multiple groups; 2) longer training programs produce more positive outcomes; and 3) trainings infused into the setting rather than standalone programs produce more positive outcomes. Trainings that are presented as remedial, that appear to be politically biased, or that does not take people’s needs, experiences, and skills into account are less effective (Chrobot-Mason et al., 2008; Mobley & Payne, 2008).

Diversity Ideological Approaches

There are a number of approaches that may be taken on the road toward non-prejudice, and these approaches can undergird DEI trainings and initiatives – serving as guiding principles or over-arching philosophies. Three well-researched approaches include colorblindness, assimilation, and multiculturalism.

Colorblindness. This perspective holds that social group membership should have no influence on how people treat one another and so people should ignore group membership altogether (Guimond et al., 2014), instead focusing on outgroup members as individuals. However, some researchers view this perspective as a form of prejudice itself because it discourages the recognition of pervasive inequalities and injustices (Rosenthal & Levy, 2010).

To that end, meta-analyses have shown that the endorsement of colorblindness or that approach to DEI training has almost no correlation with prejudice or discrimination (Leslie et al., 2020). In fact, the colorblind approach is associated with a host of negative outcomes (e.g., increased microaggressions, inability to recognize racial biases, legitimizing myths of racial hierarchies, etc.), not to mention its underlying premise is false – that people can ignore group membership. This is invariably inconsistent with how people actually think (e.g., basic social categorization processes are automatic). Thus, this philosophy or approach should be avoided in DEI initiatives.

Assimilation. This approach toward intergroup relations holds that minority group members should give up their own culture and replace them with the language, values, behaviors, and other aspects of the majority culture. This approach has shown no positive effects in terms of prejudice reduction; rather, it is firmly associated with much higher scores on measures of prejudice (Leslie et al., 2020). It, therefore, should be avoided in DEI initiatives.

Multicultural Perspective. This perspective holds that “race and ethnicity [and other social categories] should be given attention because prejudice develops in part from a lack of knowledge of and respect for other groups (Rosenthal & Levy, 2010, p. 220). Thus, multiculturalism aims to preserve the integrity of different ethnic identities, “while encouraging ethnic groups to interact and coexist harmoniously” (Hornsey & Hogg, 2000, p. 145). Studies show that taking this approach is associated with lower scores on both explicit and implicit measures of prejudice (Whitley & Webster, 2019). However, this approach is also associated with several shortcomings, including associations with stronger perception of group differences, greater stereotyping, and increased belief in race essentialism (Wilton et al., 2019). The multicultural approach can also be used as a “moral credential” that serves to legitimize the

existence of intergroup disparities. That is, majority group members in organizations with diversity policies sometimes are less sensitive to the presence of bias and discrimination than organizations without such policies. In essence, majority group members use the presence of diversity policies and trainings as a “proof” or moral credential that buffers them from holding prejudices or that suggests that discrimination does not exist in their organizations (Kaiser et al. 2013).

A Combined Approach. Given the shortcomings of each approach, trainings that emphasize a combination of equality and multiculturalism may hold the most promise. Clearly, assimilation does not work, as it is positively associated with prejudice. Different aspects of colorblindness have different relationships to prejudice. Color evasion -- the denial of differences -- is positively associated with prejudice, and, thus, should be avoided, whereas an equality orientation is related to lower prejudice. Using multiculturalism as a starting point has benefits. It has the strength of fostering knowledge of and appreciation for other culture groups and for gender and sexual-identities and their contributions to society. Using the equality orientation may offset the increased stereotyping of multiculturalism by highlighting the ways in which groups are similar as well as different and emphasizing that individual group members, although culturally similar, have their own unique personalities and worldviews. Stated differently, trainings should emphasize a combination of a personalization approach – wherein people are encouraged to see outgroup members as personally similar to and different from themselves (Ensarai et al., 2012), a salient categorization approach, wherein those outgroup members are also viewed as typical – not an exception to the stereotyped rule (Brown & Hewstone 2005), and a common ingroup identity wherein group members recategorize

themselves as part of the same, common group, sharing common goals and values (Gaertner et al., 2016). It takes a careful balance of all three approaches to nurture prejudice reduction.

Implicit Bias Reduction

If an organization's goal is to reduce implicit bias among leadership or the workforce, unfortunately, the extant literature does not adequately support any known intervention (Greenwald et al., 2022). Whether in single- or multiple-session experimental interventions, contact between ingroup- and outgroup-based interventions, large-scale field studies, or group-based trainings, such few studies have identified methods for lasting, effective, implicit bias reduction to warrant drawing reasonable conclusions for practice (see Greenwald, et al, 2022 for a review). Group trainings may promote discrimination-reduction policy efforts (Kalev et al., 2006), but appear to have little impact on workforce diversity (Greenwald et al., 2022).

A Systems Approach. While an individual-based approach toward DEI initiatives – one that for example helps participants recognize and aptly respond to their own biases – is necessary, arguably, training that focuses exclusively on individual-level factors is unlikely to foster longer-term positive intergroup relations. A spate of new research has begun to convincingly make the case that treating prejudice and biases as a contextual variable – that is, one of systems or places, is vital to a complete understanding of prejudice and, therefore, to its ultimate reduction. There are a number of reasons for this newer approach, but the most direct is found in the apparent decline of individual-level prejudice over the past several decades juxtaposed against the stable or increasing evidence of systematic or structural prejudices and biases. On the one hand, ample scholarship has shown that individual-level prejudice apparently has declined over the past several decades. For instance, between 1990 and 2017 the percentage

of White respondents saying that Black people work less hard than White people declined from 65% to 31% (Moberg, et al., 2019). Many other examples emerge in nationally representative research, but overall, such trends are interpreted as progress. On the other hand, scholarship on systematic racism and other –isms supports a less optimistic view. Segregation in housing and education declined in the 1960s and 1970s, but has remained stable since then (Reardon & Owens, 2014). Large racial gaps in chronic diseases and life expectancy have remained stable since at least the 1980s. Misperceptions that Black adults and children are less sensitive to pain than their White patient counterparts is not uncommon in healthcare settings and beyond (Hoffman & Trawalter, 2016; Pitts et al., in press). Disparities in income and wealth have grown since 1979, and people of color and women are vastly underrepresented at the highest levels of the corporate hierarchy, with, for example, only four Black CEOs in the Fortune 500 (Wilson & Rodgers, 2016).

Even implicit bias, which is often treated as a highly individual attitude, seems to show its effects not only at an individual-level, but system-wide. That is, implicit biases operate, in part, as the byproduct of a mind that draws inferences from perceived (stereotyped) statistical regularities when that mind is embedded in an environment of systemic biases (Payne et al., 2017). For example, the greater the implicit bias against Blacks in a geographic region, the greater the lethal use of force by police; the greater the Black American deaths from circulatory diseases, the lower spending on Medicaid disability programs; the greater the Black–White gap in infant low birth weight and preterm births, the greater the Black–White gap in school disciplining (suspension, law enforcement referrals, expulsions, in-school arrests); the greater the Black–White gap in standardized testing scores (3rd–8th grade for math and English), the lower the opportunity for upward mobility (Charlesworth & Banaji, 2021).

In terms of DEI training, the key point to derive from these models is that once biases are reconceptualized as properties of contexts (and not merely from individuals), it amends the nature of the phenomenon we are trying to explain and therefore amends how we think about solutions. Systemic sources of bias demand systemic solutions, which therefore, demand education and training about systemic bias, especially at the leadership level of an organization. For example, in terms of systems, pose to trainees (and ourselves) questions such as, “What are the root causes of biases? What historical forces, policy choices, or cultural features make some contexts more biased than others? How can institutions or organizations be designed to reduce bias? What policies or procedures are important for making a place less biased? Recognizing the privileges that *systems* bestow on majority group members relative to minority group members is an important lesson to be learned and one that may be more palatable, and, thus, more cognitively and affectively penetrable to many, than blanket assertions of privilege at the individual-level (though often such is the manifestation). Ultimately, systems changes and education are likely to have more widespread and positive impact than attempts to change individual attitudes (Payne et al., 2017).

None of the above is to suggest DEI trainings should not focus on individual-level psychology. Rather, the best practice may be to interlace various information and training situations related to both individuals and systems.

A Public Health Approach. Recently, top experts in the field of racism and other biases have recommended viewing these issues as a matter of public health (Greenwald et al., 2022; Paine et al., 2021). Two key aspects of this approach are to engage in 1) disparity finding and 2) employ preventative measures. A key suggestion for leadership is to make disparity finding a consistent, embedded part of one’s organization. One must first identify disparities before they

can be addressed, and many discriminatory practices are not easily perceived and are often under-reported, but may be readily identified within existing organizational data and practices.

In terms of prevention, leadership can employ a number of empirically supported strategies including decision blinding, wherein social categories about the person or people being evaluated are unknown to the decision makers. Another category helpful in ameliorating the negative impact of prejudice and discrimination in an organization are those of discretion-elimination strategies. Discretion in organizational setting in terms of evaluation and personnel is well known to open the door widely to discriminatory practices (Heilman & Haynes, 2008).

Examples of discretion-mitigating strategies include using highly structured interviews, objective testing of skills and abilities, objective scoring of written material, and even using artificial intelligence (AI). In their recent analysis of remedies for reducing bias, Greenwald and colleagues (2022, p. 33) offer a list of six questions organization should use to determine their preparation to handle DEI concerns. These include the following:

1. Does your organization have data that allow determination of whether its employees are receiving equal treatment?
2. Does your organization have data that allow determination of whether those to whom it provides services are receiving equal treatment?
3. Does your organization have someone with sufficient data-analysis skills to identify existing disparities and determine whether they are discriminatory?
4. Does your organization have an officer who has oversight for all DEI activities—someone who would know enough about your organization to answer the three preceding questions?

5. Has your organization ever identified a previously unrecognized discriminatory disparity?
6. Has your organization ever followed up on evidence for a discriminatory disparity by (a) implementing fixes expected to eliminate that disparity and (b) determining the extent to which the disparity was eliminated?

DEI Initiatives, Goals, and Best Practices

Leslie (2019) has identified three major goals of diversity initiatives, or “practices aimed at improving the...experiences and outcomes of groups that face disadvantages in society” (p. 35). One goal is to increase support and opportunities for underrepresented group members and to remove barriers toward advancement. A second goal is to increase responsibility and accountability for monitoring DEI objectives. A third goal is to decrease bias and discrimination. Another goal implied by Leslie (2019), yet not explicitly reviewed, is that effective DEI initiatives should be concerned with how their initiatives make those from marginalized groups feel, and to the extent they foster more feelings of belonging, inclusion, and equity, they are well worth the effort.

Increasing Opportunities. Organizational practices that perpetuate inequalities undermine an organization’s mission to recruit, hire, and advance the most talented people as well as jeopardize the ethicality of its decision-making. Thus, the first step toward effective DEI trainings is for leadership to look for and rectify policies, which even unintentionally, have adverse effects on certain social groups. For example, many job performance evaluation instruments emphasize characteristics generally associated with men (e.g., agentic, etc.), leading to lower performance evaluations for women (Bowen et al., 2000). Similarly, in terms of recruitment and advancement, replacing word-of-mouth opportunities – often-used by Fortune

500 companies and other organizations – with more objective measures and procedures helps diversify the workforce (e.g., Dobbin & Kalev, 2016).

Monitoring Diversity Goals. Diversity initiatives are most effective in organizational climates where diversity and inclusion are normative and valued (Cox, 2001). Intergroup contact is more successful in advancing team objectives and lowering prejudice when organizational leaders signal strong support for diversity initiatives (Bezrukova, et al., 2012). Likewise, establishing accountability is an important component of any successful diversity initiative. Leaders may, for example, establish diversity task forces that track and make public the organization’s progress toward meeting its DEI goals, including identifying where the problems are. Connecting success in meeting diversity goals to salary increases and promotions is an effective way to demonstrate leadership commitment to diversity, equity, and inclusion (Dobbins & Kalev, 2016).

DEI Training in Corporate Settings. Diversity and inclusion “should be a core ingredient in the design and execution of business strategy and embedded in the activities of the organization day in, day out” (Cox & Lancefield, 2021, p. 4). However, the training of D&I should not be short-term, or “one-shot” (e.g., Jordan, 1998), as these style of trainings “do not typically result in sustained behavior change” (Cox & Lancefield, 2021, p. 7). Instead, D&I training should be “part of an enterprise-wide strategic approach, [that] includes both awareness and skills development, and is conducted over time” (Cox & Lancefield, 2021, p. 7). Various industries may approach inclusive practices differently, but agree that diversity and inclusion training, education, and delivery is necessary for future development.

For example, Edison International utilizes education and training to empower their employees with D&I skills that can be applied in their day-to-day interactions and decisions

(Edison International, n.d.). Delta Air Lines focuses on providing inclusion training at every level of the company (Staff Writer, 2022); CVS also promotes a commitment to training that highlights and fosters a culture of inclusion (CVS Health, n.d.). D&I education and training can also take place across organizational levels, to include the leadership level. For example, Edison International provides a “one-year leadership training and mentoring program that equips new leaders with tools and resources to lead with values, inclusion and empathy on a daily basis” (Edison International, n.d., p. 12).

For leaders who frequently find themselves in charge of trainings and educational spaces, it is worth considering valuing connection over correctness (Sandoval, 2021). That is to say, viewing the role as a leader as one to connect with others, as opposed to correcting actions, thoughts, or behaviors (Sandoval, 2021). An educational environment that provides space for everyone, including the instructor, to learn and relate is an important way to value the diverse experiences of others (Sandoval, 2021).

Multiple strategies can be taken to integrate D&I across an organization (e.g., Derven, 2014). For example, Anderson (2022) notes that businesses can implement the following to promote inclusion practices:

- Drive: determine why diversity and inclusion matters to the organization.
- Knowledge: analyze the current state of affairs and identify how people feel about the current inclusion climate.
- Strategy: determine how people can be involved in creating change, the timeline for doing so, and the initiatives.
- Action: implement training and coaching, as well as assessment of efforts.

Other strategies that can be utilized to integrate D&I training include the following:

- Creating diverse project teams
- Increasing volunteer opportunities for employees
- Strengthening the benefits package to meet the needs of more folks
- Reviewing performance standards to ensure they are fair and equitable (Caswell & Perkins, 2019)
- Recruiting or promoting and retaining diverse senior leaders
- Adapting efforts regionally to ensure local impact (Derven, 2014)
- Creating affinity groups or employee resource groups (e.g., Derven, 2014), which can include a variety of foci, such as mentoring, community building, etc. (e.g., Dutton, 2018)

Research supports the beneficial effect of D&I training on employee relations. For example, a recent study conducted on diversity and inclusion trainings in a hospital setting determined that diversity workshops led to increased employee engagement (Henao et al., 2021). By promoting D&I, industries can successfully foster a group of individuals who are “more likely to create products and services that work for a diverse clientele, avoid biased assumptions, generalizations, or shortcuts” (Cox & Lancefield, 2021, p. 5). With regard to D&I, leadership development training and coaching should be put into place in order to create more effective managers, as these individuals can drive employee engagement (Cox & Lancefield, 2021).

Leadership Development

This section provides examples of general leadership development efforts in academic and industrial settings while providing justification for the necessity of military leadership development. The guiding principles of these efforts can be applied to the development of leaders with regard to their D&I, EO, and EEO relevant skills.

Leadership Development in Academic and Industrial Settings

The creation of leadership education can fluctuate across industries. For example, academia typically utilizes leadership development via curriculum, whether that be through separate modules, overall coursework, or degrees (Naude, 2017); corporate universities tend to focus on delivering training and development to organizations by partnering with the organization's senior leadership (Kolo et al., 2017). Corporations are also known to provide their own version of leadership development.

For example, Coca-Cola and Gillette International both utilized job assignments as a form of leadership development. Both companies sent managers from the United States to various countries overseas in order to broaden the experience and exposure of those managers with the goal to create more effective leaders (Laabs, 1991). Another example of leadership development comes from Citibank (Dotlich & Noel, 1998). Specifically, Citibank selected internal talent from a global pool of candidates to participate in a training that reinforced a broad systems perspective. From there, candidates were grouped into teams to participate in team building and orientation, followed by data collection, analysis, and developing recommendations for the company via a presentation to the CEO and business heads (Dotlich & Noel, 1998). By taking the time to engage with lower-level management and develop them as leaders, senior management was also able to create a more effective environment and climate for the entire organization.

It is important to note that difference experiences in leadership can impact how each lesson is received (McCall, 2010). Regardless of where leadership development takes place, leaders must walk away from training with context comprehension and understanding of how organizations work systematically (e.g., Keeshan & Chetty, 2017).

Justification for Military Leadership Development

Various leadership styles can inform military leadership. For example, servant leadership and transformational leadership have both been shown to influence proactivity and organizational relationships in subordinates (e.g., Madjan & Jayasingam, 2019; Moreno et al., 2021). Ihme & Sundstrom (2020) found that military leaders trained in mindfulness self-reported better transformational leadership behaviors, resilience, and perceived effectiveness. Military leaders can also influence the development and empowerment of their subordinates (e.g., Dvir et al., 2002). Although each branch of Service has their own definition of leadership (e.g., Department of the Air Force, 1985; Department of the Army, 2012; TECOM, 2008; United States Coast Guard, 1997; United States Marine Corps, 2015), which includes influencing others to accomplish a mission (Malik, 2016) and commitment to building competent leaders (Kirchner & Akdere, 2017), in order to be considered effective, individuals must be able to adapt their leadership style to meet mission, personnel, and environmental demands (e.g., Wiedmer, 2015). As noted in the literature, "Military training and procedures are keenly focused on maintaining or improving force readiness" (Kirchner & Susan, 2022, p. 24). Additionally, effective leaders require advanced decision-making skills, informed by experience and self-awareness, as well as organizational and mission-critical knowledge (e.g., Hanser et al., 2008). As such, military leaders must be able to balance the welfare of their subordinates with the focus on mission orientation (e.g., Morath et al., 2011). Moreover, military leaders must be adaptable and people-oriented (e.g., Huertas-Valdivia et al., 2019). When it comes to training effective military leaders, Retired ninth Sgt. Maj. of the Army Richard A. Kidd notes in the Army Leadership Field Manual that "soldiers learn to be good leaders from good leaders" (as cited in NCO Journal Staff, 2018, p. 1). Therefore, providing training over leadership may help to improve leadership ability (e.g., Dobbs & Do, 2019).

Training, Education, & Instruction

Although training and education overlap in many areas, their function can vary. For example, training typically refers to the goal of modifying behaviors where no behaviors existed, whereas education can be thought of as a broad approach to filling in gaps of understanding (e.g., Garavan, 1997). However, education and training converge when it comes to leadership development and delivery. According to Day (2000), leadership development focuses on “higher levels of both leadership integration and differentiations” (p. 586). Additionally, leadership development occurs when members of an organization are able to expand on their leadership roles and processes (McCauley et al., 1998). Therefore, leadership development can enable Service members to improve and build upon their experiences, “in order to turn proficient fighters into effective leaders” (Constantinescu et al., 2021, p. 64).

Content Experts

According to the Army, a Subject Matter Expert (SME) is a content knowledgeable individual who can perform tasks and skills of a specific job or position (TRADOC, 2007). Bandura’s social learning theory suggests that learning is enhanced if an expert is perceived as credible and similar to the audience (Bandura, 1986). Therefore, to ensure the creation of effective education and training development, subject matter experts, facilitators, or guest speakers must be available; these individuals can include academics, advocates, or other senior military leaders.

Guest speakers provide an opportunity to access a subject matter expert while applying and processing knowledge acquired, which can in turn enrich experiences and link theory with practice (e.g., Alebaikan, 2016). A guest speaker could be an individual who has personally experienced a relevant story that can serve as a case study or learning point for senior leaders;

individuals are then able to learn from those experiences (e.g., Kamoun & Selim, 2007).

Additionally, “senior officers, especially those who have had been in command, bring with them an extraordinary level of leadership training that has been honed and developed throughout a long career” (Clevenger, 2014, p. 4). As such, senior officer SMEs can foster leaders’ ability to understand content and give meaning to said content as it relates to their own mission readiness (e.g., Abell, 2003).

In order to be effective, these experts should have either an education in a related field or equivalent professional experience (e.g., Bransford et al., 2004) in addition to a minimum of 5 years of experience in a leadership role. It is also recommended that qualified individuals should have educational and practical expertise in the delivery of engaging and interactive training modules (e.g., Hahne et al., 1986), technological experience (e.g., Saundra, 2001; Varini et al., 2004), and an understanding of how to apply adult learning theories (e.g., Lechner et al., 2017; Saundra, 2001), especially as it relates to virtual and in-person classrooms.

Stages of Leadership

Different levels of leaders’ professional development will require different types of education and training strategies to facilitate ongoing learning and mastery of competencies (Fick et al., 2018). For example, there are differences between a frontline leader and a senior leader. A frontline leader typically has direct contact with employees (Schwatka et al., 2019) and ensures that innovation takes place with employees (Mohamed, 2021). Senior leaders are typically considered upper management and are often responsible for tasks such as planning, budgeting, or organization (e.g., Reimer et al., 2018). To be effective, senior leaders must employ the right leadership style for their goals, exercise good judgment, and motivate their subordinates (e.g., Hanser et al., 2008; Mohamed, 2021). Additionally, high performing leaders

view formal leadership development and continuing leadership training to be an important factor in their own development as successful leaders (Longenecker & Insch, 2019). In essence, when material is tailored for situations that personnel might encounter in their responsibilities at their current rank, it can better serve them as leaders, which can enable them to better serve their organization.

Modality: Length

In general, “learning takes place over time and is dynamic” (McCall, 2010, p. 5). As such, training is most effective when spaced out over time. Referred to as the “spacing effect,” presenting information over a period of time allows for information to be acquired in diverse contexts, which is more conducive to learning outcomes than presenting information at a single training event (Ely & Roberts, 2008; Glenberg, 1979; Kornell, 2009). The spacing effect can also be explained via cognitive memory load theory, which suggests that working memory capacity is limited (e.g., van Merriënboer & Sweller, 2005). In summary, effective learning can only take place if spacing takes place as it can reduce cognitive memory load, thereby freeing up cognitive resources, which facilitates learning (e.g., Janiszewski et al., 2003)

According to Odierno (2015), “leader development is achieved through the career-long synthesis of training, education, and experience. It is fostered in the institutional (schools and courses), operational (duty assignments), and self-development (selected activities) domains, supported by peer and developmental relationships”; leaders must not only continually engage in training and education, but also continuously self-develop. Therefore, continuous training and education should take place throughout an officer’s career, as it serves to reinforce core Service values outside of established professional military education channels to create a healthier culture (Fernandez de Bobadilla Lorenzo et al., 2017).

Annual training must also occur to reinforce leadership development. According to Fernandez de Bobadilla Lorenzo, et al. (2017), annual training must emphasize collective ownership, leverage the peer influence of opinion leaders, and create an open forum for feedback that initiates change when needed. Moreover, senior military leaders must stress reoccurring assessment systems at every annual training session (Fernandez de Bobadilla Lorenzo et al., 2017).

Modality: Delivery

Leadership development can vary across modality and platform, as different platforms may match different goals and collaboration efforts (Williamson & Blackburn, 2020). Training can be provided in either an asynchronous (e-learning) classroom or synchronous classroom (e.g., live virtual or in-person), as all modalities allow for group discussions and small group activities. For example, e-learning leadership development can offer leaders “more autonomy to complete classes on their own time and contribute toward an increased understanding of essential leadership principles (Kirchner & Akdere, 2017, p. 360). Virtual delivery can also accommodate leaders who cannot be absent from their posts for extended periods of time. Virtual workshops are conducive to discussions and review of both peer and individual progress (Saghafi et al., 2014). In-person seminars support hands-on skills training, peer engagement, and spontaneous feedback (Saghafi et al., 2014). Some research indicates that there are no differences in learning and outcomes when it comes to delivery (e.g., face to face or online; Reyes et al., 2019). For example, scenario-based learning, which promotes authentic learning through real-world examples, is equally effective regardless if delivered in-person or via e-learning (Mehall, 2022). In summary, different methods of delivery can be utilized to provide learners with opportunities to develop their leadership.

Adult Learning Theories and General Instructional Strategies

Theories of adult learning can aid in the development of leadership training and education (Day et al., 2009). Moreover, each type of adult learning theory can better establish a connection to the assessment that is utilized:

- The cognitivist approach prompts individuals to draw on knowledge to inform behavior (Allen et al., 2022). The best instructional strategies that overlap with this adult learning theory are online learning, reading, watching videos, or listening to podcasts (e.g., Allen & Hartman, 2009). However, one pitfall to utilizing this learning theory is that there may be a lack of application; individuals can build a cognitive foundation, but may not be able to enact the specific behaviors learned.
- The behaviorist approach focuses on creating an environment where behaviors and skills are reinforced to meet learning objectives (Allen et al., 2022). Some instructional strategies can include simulations or scenarios where individuals are required to work through a problem (Allen et al., 2022). It is important to note that a single staged scenario or simulation may not be enough to enhance a particular behavior.
- The humanistic approach has individuals increase their self-awareness to unfold self-knowledge (Allen et al., 2022). Instructional strategies that overlap with this adult learning theory include 360-degree feedback, coaching, or service-learning opportunities (Allen et al., 2022). Unfortunately, humanistic assessments can lack a common level of assessment means as it relates to effectiveness; essentially, because there is such an individualized approach, it can be difficult to assess if the task is truly effective.

- Social cognitive theory promotes the idea that experienced individuals can aid in the facilitation of learning (Allen et al., 2022); methods of assessment include the use of guest speakers, networking with executives, and mentoring (Allen et al., 2022). Just as with humanistic theory assessment strategies, social cognitive theory strategies are difficult to measure because “learners may not focus [on their learning] and therefore may miss valuable lessons through a lack of close attention” (Allen et al., 2022, pp. 267-268).
- Constructivist theory focuses on providing learners with experiences (Allen et al., 2022). Some instructional strategies include experiential learning, project-based learning, or service-learning (Allen et al., 2022). Constructivist theory suffers the same limitations as the social cognitive theory and humanistic theory, in that it is difficult to measure growth and return on investment.

Experts note that “The most robust environments for comprehensive adult development...must sustain a clear message of expectations across multiple years, and support...development to achieve those expectations through consistent and integrated teaching and evaluation in multiple modalities” (Allen et al., 2022, p. 276). In summary, no one adult learning theory approach or instructional strategy is superior to the other. In fact, multiple forms of adult learning theory and assessments should be applied in order to build the best training.

Examples of Leadership Assessment

Ramirez et al. (2021) emphasizes that leadership competencies are developed when leaders are given multiple opportunities to apply their knowledge. As it currently stands, most leadership development is 10% classroom/formal training, 20% coaching, and 70% experiential activities and assignments (Loew & Garr, 2011, as cited in Odendaal, 2017). Therefore, the

activities and assignments selected for leadership education and development should be reflective and applicable to the individual leader. Common strategies for assessing leadership trainings include the following:

- Introduction assignments (e.g., Hurtwitz, 2017)
- In-baskets: standard emails/memos that need to be prioritized (e.g., Taylor & Vorster, 2017)
- Case studies: responding to particular situations or dilemmas (e.g., Taylor & Vorster, 2017)
- Self-reflections or journals (e.g., Hurtwiz & Hurtwitz, 2020)
- Role play activities: interacting with person posing as client or colleague (e.g., Taylor & Vorster, 2017)
- Presentations: presenting to panel on job-specific topic (e.g., Taylor & Vorster, 2017)
- Various group activities: leaderless group discussions (e.g., Hurtwiz & Hurtwitz, 2020; Taylor & Vorster, 2017)
- 360-degree assessments (e.g., Allen et al., 2022; Day, 2000)

For example, Hurtwitz (2017) showcased an introduction assignment where individuals were paired up to discuss a unique strength, under the guise of introducing one another. After the discussion, the partners were given revised sets of instructions, whereby the partner had to share whether or not the individual was a better leader or better follower. After introductions, students would then move to separate sides of the room (leader versus follower) to discuss the choices; this served as an opportunity to dialogue about challenges or biases regarding leadership versus followership. After a debrief, individuals were then asked to move once more to where

they felt they were best represented in their personal strength, which opened up the discussion more about labels and biases as it relates to leadership once more. Breakout groups can also focus on a more leadership-oriented discussion, focusing on questions such as the following:

- “What would it look like to take initiative and accountability for your own professional development and performance development?” (Hurtwiz & Hurtwiz, 2020)
- “In what ways might you develop organizational agility and be in the best position to represent your leader, and to be their true thinking partner?” (Hurtwiz & Hurtwiz, 2020)

Leadership Evaluations

As previously mentioned, leaders should continue to develop their learning through education and training (Allen et al., 2022), as leadership development is a lifelong endeavor (Department of the Army, 2012). However, it is ultimately up to the individual to build their skillsets within their own surroundings after the delivery of education and training (e.g., Allen et al., 2022). One method to check leadership development is through evaluations. Establishing clearly defined competencies for evaluations, based on the organization’s ideal leadership qualities, can guide leader identification and development. One type of performance review that exists is 360-degree feedback.

360-degree feedback is a comprehensive (i.e., employees, employers, self-evaluation, peers, etc.) assessment of performance (e.g., Indeed, 2020; Warech et al, 1998 as cited in Day, 2000). Providing 360-degree feedback throughout an officer’s career can stress the need for emotional intelligence when developing leaders (Dagless, 2018; Fernandez de Bobadilla Lorenzo, et al., 2017) as well as help leaders understand which areas of their performance need

improvements (e.g., Komaki et al., 1980). In order for 360-degree feedback to be effective, the individual must be open to change and willing to accept the feedback (Day, 2000). Research suggests that “360-degree feedback data collected with a psychometrically valid and well-constructed assessment is predictive of who will ultimately be the most effective leaders” (Zenger & Folkman, 2022).

Conclusion

As noted in ADP 6-22 (Department of the Army, 2019),

Leadership as an element of combat power, coupled with information, unifies the warfighting functions (movement and maneuver, intelligence, fires, sustainment, protection and command and control). Leadership focuses and synchronizes organizations. Leaders inspire people to become energized and motivated to achieve desired outcomes. (pp. 1-13)

Additionally, “unit cohesion and unit leadership mitigate the negative effect of perceived stress on personal growth” (Bekesiene & Smaliukine, 2022, p. 13). When leaders display effective leadership (e.g., balance mission success, internal integration, member well-being, and external adaptability), there appears to be a reduction in follower stress (e.g., more clear roles, a clear organizational structure, challenging yet meaningful work) (e.g., Squires & Peach, 2020). Therefore, leadership education, training, and development can further enhance the performance and wellbeing of all Service members, which in turn can enhance climate and force readiness.

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Activity Appendix

PRIOR TO ANY AND ALL USE OF THE ACTIVITIES IN THIS APPENDIX, PLEASE VERIFY THAT AUTHOR/OWNER PERMISSION IS OBTAINED WHERE NEEDED AND THAT USE OF THE MATERIALS DOES NOT RESULT IN COPYRIGHT INFRINGEMENT.

The following activities are provided as guidance and suggestions for ways to bring the research presented to life. They are designed to be interactive and engaging, with the intent of creating experiences for participants that result in changed perspectives and critical thinking about the topics at hand.

Setting Expectations for the Seminar

This activity can serve as an icebreaker and can also be utilized for reflection at the end of the seminar.

Setting the Tone

Many people are hesitant to discuss their views about prejudice and discrimination for a variety of reasons. One way to address this is to have workshop participants anonymously record on index cards one fear, one concern, one expectation, and one hope they have about the session or training or workshop. Attendees are then put into groups (three to five may be optimal). The cards are shuffled and handed out evenly to groups. The group members then come up with rules for discussion that take the responses into account. The major topics that attendees list can then be summarized (e.g., fear of conflict; hope of learning something important) and subsequently presented to and discussed with the audience (for further see Venables, 2011).

Listening Skills/Calling People In

Another strategy for setting the tone for effective discussion is to review listening skills with the audience at the beginning of or prior to the seminar. In order to fully engage with each other, it is necessary that participants feel safe and welcome to voice their perspective. Loretta Ross has suggested that calling people “in” to learn is more effective than calling them “out.”

Participants can either read a *New York Times* article about the approach or watch Ross’ TED Talk prior to the class discussion.

Bennett, J. (2020). *What if instead of calling people out, we called them in?* *New York Times*.
www.nytimes.com/2020/11/19/style/loretta-ross-smith-college-cancel-culture.html.

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https://www.youtube.com/watch?v=xw_720iQDss.

Transformational Leadership Case Vignette for Small Group Discussion

Northouse (2016) provides the following case study to be utilized for small group discussion on transformational leadership behavior:

The Vision Failed

High Tech Engineering (HTE) is a 50-year-old family-owned manufacturing company with 250 employees that produces small parts for the aircraft industry. The president of HTE is Harold Barelli, who came to the company from a smaller business with strong credentials as a leader in advanced aircraft technology. Before Harold, the only other president of HTE was the founder and owner of the company. The organizational structure at HTE was very traditional, and it was supported by a very rich organizational culture. As the new president, Harold

sincerely wanted to transform HTE. - He wanted to prove that new technologies and advanced management techniques could make HTE one of the best manufacturing companies in the country. To that end, Harold created a vision statement that was displayed throughout the company. The two-page statement, which had a strong democratic tone, described the overall purposes, directions, and values of the company.

During the first three years of Harold's tenure as president, several major reorganizations took place at the company. These were designed by Harold and a select few of his senior managers. The intention of each reorganization was to implement advanced organizational structures to bolster the declared HTE vision. Yet the major outcome of each of the changes was to dilute the leadership and create a feeling of instability among the employees. Most of the changes were made from the top down, with little input from lower or middle management. Some of the changes gave employees more control in circumstances where they needed less, whereas other changes limited employee input in contexts where employees should have been given more input. There were some situations in which individual workers reported to three different bosses, and other situations in which one manager had far too many workers to oversee. Rather than feeling comfortable in their various roles at HTE, employees began to feel uncertain about their responsibilities and how they contributed to stated goals of the company. The overall effect of the reorganizations was a precipitous drop in worker morale and production.

In the midst of all the changes, the vision that Harold had for the company was lost. The instability that employees felt made it difficult for them to support the company's vision. People at HTE complained that although mission statements were displayed throughout the company, no one understood in which direction they were going. To the employees at HTE, Harold was an enigma. HTE was an American company that produced U.S. products, but Harold drove a

foreign car. Harold claimed to be democratic in his style of leadership, but he was arbitrary in how he treated people. He acted in a nondirective style toward some people, and he showed arbitrary control toward others. He wanted to be seen as a hands-on manager, but he delegated operational control of the company to others while he focused on external customer relations and matters of the board of directors. At times Harold appeared to be insensitive to employees' concerns. He wanted HTE to be an environment in which everyone could feel empowered, but he often failed to listen closely to what employees were saying. He seldom engaged in open, two-way communication. HTE had a long, rich history with many unique stories, but the employees felt that Harold either misunderstood or did not care about that history. Four years after arriving at HTE, Harold stepped down as president after his operations officer ran the company into a large debt and cash-flow crisis. His dream of building HTE into a world-class manufacturing company was never realized.

Questions.

1. If you were consulting with the HTE board of directors soon after Harold started making changes, what would you advise them regarding Harold's leadership from a transformational perspective?
2. Did Harold have a clear vision for HTE? Was he able to implement it?
3. How effective was Harold as a change agent and social architect for HTE?
4. What would you advise Harold to do differently if he had the chance to return as president of HTE?

In-Group, Out-Group, and Affinity Bias Activities

Fowler (2005, p. 407) proposes the following learning activity to facilitate subsequent group discussion about in-groups, out-groups and affinity bias:

The Tag Game

“The Tag Game is quite simple and can be used for both intercultural and diversity training. To begin, trainees paper clip a badge made of construction paper somewhere between waist and neck. The badges are circles, squares, or triangles and differ in size and color. They are instructed to form groups without talking. Then again without talking, they are instructed to form new groups. This is repeated at least two more times. Several variations can add more rounds, such as asking them to put on new badges, each of these being oddly shaped, no two very much alike, then repeating the instructions to form groups without talking. Participants bring this fresh experience of the human affinity for likeness to the discussion following the activity. People usually form groups with people who have badges the same color or shape. When pushed, some will begin to look beyond the badges, but very rarely will they begin looking for difference, forming groups in which many shapes and colors are represented. The debriefing can be guided into a discussion of group-based differences in the real world and how to develop ways of introducing, valuing, and supporting difference in work groups. When the Tag Game is part of a diversity program, ingroup/outgroup distinctions are an intercultural concept that can be raised during the debriefing. Trainees relate their experience in the game to real-world experiences, often with new insight into the interpersonal dynamics of their workplace.”

The Circle of Trust

The below exercise is commonly used in DEI trainings to explore affinity bias (Cultureplusconsulting, 2018).

“The Circle of Trust is a powerful exercise for demonstrating the effect of affinity bias. In this exercise, participants are instructed to write down in a column on the left-hand side of a blank piece of paper the initials of six to ten people whom they trust the most who are not family members. The facilitator then reads out some diversity dimensions including gender, nationality, native language, accent, age, race/ ethnicity, professional background, religion, etc., and participants are instructed to place a tick beside those members of their trusted circle who are similar in that dimension to them. For example, male participants will place a tick beside all men in their trusted six, white participants will place a tick beside all white individuals in their trusted six, etc. Participants discover that their trusted six often displays minimal diversity – for most participants, their inner circles include people with backgrounds similar to their own. The facilitator explains that this tendency or preference for people like ourselves is called affinity or ingroup bias and is well-researched. Studies show that, in general, people extend not only greater trust, but also greater positive regard, cooperation, and empathy to ingroup members compared with outgroup members. This preference for people like ourselves is largely instinctive and unconscious. Affinity bias manifests not only as a preference for ingroup members — but it may also manifest as an aversive tendency towards outgroup members. For example, we are more likely to withhold praise or rewards from outgroup members. Participants are then prompted to consider the implications of this for the workplace. For example, as leaders, when they assign responsibility for a high-profile piece of work, to whom do they entrust that responsibility? The facilitator suggests that participants will likely offer opportunities to those individuals whom they trust the most. Those people, it turns out, are people who are similar to themselves. Now, because success on high-profile assignments is critical for emerging as a leader, a tendency to favor people like ourselves when assigning stretch

assignments leads to self-cloning and promotes homogeneity in leadership. Though not intentional, people who are not like us get overlooked and left behind.

Although we believe we are making objective assessments of merit and treating people fairly, hidden preferences for people like ourselves can cause us to support the development and career progression of some people over others without us even knowing we are doing so. Regarding employment, affinity bias can compel people to favor those who are most similar to themselves, thereby leading to a tendency for leaders, people managers, or recruiting managers to hire, promote, or otherwise esteem those who mirror attributes or qualities that align with their own.

Moreover, we are also very good at justifying our biases. Studies show that we exhibit a systematic tendency to claim that the strengths of ingroup candidates are more important selection criteria than are the strengths of candidates with backgrounds different from our own.

Affinity bias can also lead us to actively solicit, pay greater attention to, and to favor the contributions of ingroup members over outgroup members. We are also more likely to mentor or sponsor ingroup members compared with outgroup members.

In some groups, there may be certain individuals with a diverse inner circle. The facilitator encourages participants to think about how an individual's experiences could disrupt affinity bias with the ensuing discussion drawing on intergroup research supporting intergroup friendship as a prejudice reduction technique.”

Suggested discussion prompts/questions:

1. Have you observed affinity bias in your organization?
2. How could affinity bias impact marginalized individuals in your organization/the organization at large?
3. What are some strategies to disrupt affinity bias in your organization?

Systemic Discrimination Awareness Activity

This activity encourages critical reflection on dominant American narratives and how these narratives can contribute to systemic discrimination against marginalized groups. Racial disparities are presented and discussed. Research indicates that most Americans view racism, sexism, and other “-isms” as an individual, not an institutional problem (Pew Research Center, 2016). This belief, in turn, makes it easier to blame problems on “the general other” rather than to (a) look at oneself or (b) more importantly, to look at broader systemic factors such as policy and the like. Leaders should, therefore, engage in activities that promote an understanding of systemic discrimination.

An Unlevel Playing Field

The facilitator introduces and opens up for discussion two quintessential American values: egalitarianism and the “Protestant work ethic.” In combination, these two values suggest that as long as one works hard (“pulls themselves up by their bootstraps”), then everyone has an equal opportunity to succeed, to earn their “American dream.” In essence, the uncritical acceptance and following of these two values leads to the belief in the myth that we live in a meritocracy: that the industrious rise through sheer force of their own effort while the have-nots flounder on the rock of failure because they lack the fundamental characteristics required for success. This is a dominant American narrative.

The facilitator then challenges the audience to see how un-level the playing field really is by showing them how, despite individuals’ best intentions, there is subtle, widespread systematic discrimination against marginalized groups and unearned privilege for others.

The facilitator outlines how social systems are distinct from individuals by utilizing the example of the game of Monopoly (see Johnson, 2016). The audience could also read the Johnson (2016) article *Aren’t systems just people?*. After the notion of “system” has been

introduced, the facilitator presents facts on racial disparities that can serve as a starting point for small group discussions.

The facilitator presents graphs showing modern-day group-based disparities in health care, education, earnings, racial, and gender differences among the highest earners (e.g., Fortune 500 CEOs) and powerful (U.S. Congress), and many more, including in the military (see below):

- Seventy-five years post-integration, there remains large racial and gender disparities within the militaries' upper echelon. For example, while some 43% of the 1.3 million men and women on active duty in the United States military are people of color, those in the most influential positions are almost entirely white and male. Cooper (2021) notes that, "Of the 41 most senior commanders in the military – those with four-star rank in the Army, Navy, Air Force, Marines, and Coast Guard – only two are black" and both are male.
- We see very similar disparities at the highest level of business and government. Nearly 90% of Fortune 500 CEOs are white men and only 31% of board members of these corporations are female, with only 7% of board members females of color (Mogul, 2021). A recent LeanIn.org study showed that among 333 organizations that employ more than 12 million people, only 26% of C-suite leaders are women, with only 5% being women of color. Similarly, only 24% of United States senators are female and 28% are in the House of Representatives. While the US senate and house are more racially diverse than ever, close to 80% of congress identifies as white. The numbers for sexual diversity in these realms are similarly dismal.
- Ask attendees two questions: "For every \$1 earned by an average white family, how much do you think is earned by an average black family?" For every \$1 in net wealth

accumulated by an average white family, how much wealth has the average black family accumulated?” The stark difference between what your attendees think and the reality will be staggering. Research shows that participants tend to think the average Black family earns about .60 to every \$1.00 for White families. The reality is a penny to the dollar. One sees similar disparities in thoughts and reality in terms of net wealth, where reality is .46 cents for Black families to every \$1.00 for White families. Put differently, at \$171,000, the median net worth today of a typical White family is nearly 10 times that of the typical Black family (\$17,150), and this gap has grown dramatically since the civil rights era to today, not shrank. Even when we compare White and Black families who earn the same income, have the same saving rates, work the same hours with the same experiences, have the same family structure, and have the same education, we see that the media net wealth of White families remains nearly seven times that of the comparable Black family (see Percheski & Gibson-Davis, 2020).

- Health Disparities. There are widespread and persistence racial gaps in health brought about by social determinants of health such as education, income, access, and discrimination, among others. For example, the CDC (<https://www.cdc.gov/minorityhealth/racism-disparities/index.html>) and many others report that, “ethnic minority groups in America experience higher rates of illness and death due to a range of health conditions such as diabetes, hypertension, obesity, asthma, and heart disease compared to their White counterparts.” Similar stark disparities exist in mental health care (see <https://www.americanprogress.org/article/health-disparities-race-ethnicity/>). Similarly, there exist well-known large disparities in how Black and White

adults (e.g., Trawalter & Hoffman, 2015) and children (Pitts et al., in press) are (incorrectly) thought to experience pain and are subsequently treated for pain.

The facilitator then initiates a group discussion on leadership strategies to mitigate systemic bias with question prompts such as the following:

1. What are the systemic barriers in your organization that contribute to an unlevel playing field?
2. How do you think these barriers impact individuals, especially those from marginalized groups? What do you think it is like to be a marginalized individual in your organization?
3. How can you lead in a manner that levels the playing field and transforms the organizational climate towards increased diversity, equity, and inclusion in your organization?

Exploration of Feelings of Inclusion versus Exclusion

Mary Kite's website Breakingprejudice.org provides the below activity, authored by Donna Stinger. The site also offers a wide variety of other activities geared to explore concepts such as prejudice, microaggressions, cross-cultural social attitudes, and gender socialization, to name a few.

NOTE: These materials were developed for free use in a non-profit setting. We invite individuals in those settings to reproduce multiple copies of the material on this website at no cost for their personal use, including use in their classes and/or sharing with individual colleagues. If you are using these materials in a for-profit setting, please contact Mary E. Kite, Ball State University (mkite@bsu.edu) for information about payment for use. See [Breaking Prejudice - Copyright & Permissions](#)

Insider/Outsider Activity

During this activity, participants identify aspects of inclusion and exclusion, also commonly known as insider and outsider groupings. One objective of this activity is to ensure that people realize that everyone has experienced being both an "insider" and an "outsider." Another objective is to encourage people to take the perspective of those who are excluded and to consider how those negative feelings affect others' behavior in social situations. This activity can be completed in small or large groups and can be used as an icebreaker or as a way to generate discussion about belonging.

Objective. During this activity, participants identify aspects of inclusion and exclusion, also commonly known as insider and outsider groupings. Estimated time 10-20 minutes, adjustable to any group size.

Step One – Collect Outsider Emotions.

- Explain that this exercise will help people experience what it feels like to be both an outsider and an insider.
- Ask participants to think of a time when they were in a team or a group and they were different from others in the group or felt excluded.
- Participants then think of one or two words that describes how they felt at that time.
- After participants have had time to think of the words, they walk around the room, introducing themselves to as many people as possible, using those words. Provide an example (e.g., Hi! I'm awkward and confused.) For larger groups, they can turn to the two or three others standing next to them and introduce themselves using those words. Another option for large groups is to have people text their emotions using the online

software Poll Everywhere (polleverywhere.com) or use clickers. The facilitator can then project the results to the group.

Step Two – Collect Outsider Feelings.

- Have people call out what feeling words they heard. Record them under the "Different Feelings" column.

Step Three – Collect Insider Feelings.

- Without going through the step of introductions, have people think of a time when they were in a team or group and felt included.
- Have them call out words that describe how they felt in that situation.

Step Four – Collect Insider and Outsider Behaviors.

- Ask participants to list their behaviors when they felt they were excluded by the group. Provide an example (e.g., I would not participate in the discussion if I felt excluded).
- Repeat this procedure for the times they felt included. Provide an example (e.g., I might talk to the person next to me if I felt included).
- Watch that participants actually use behavioral words; people have a tendency to use feeling words again. For example, if someone says "I would act angry," ask them how they would act when they felt angry.

Developing Anti-Prejudice Strategies Activity

This activity provides leaders with an opportunity to explore strategies to combat prejudice in their respective organizations.

- Ask participants (anonymously) to create a list of things they can *personally* do to combat prejudice. Collect these items and tape them up around the room and have everyone go

around to read them. What themes do participants notice? Which items on the list are easier to do than others? Which are likely to have the greatest impact? Why? For an excellent resource, see *Close the Book on Hate: 101 Ways to Combat Prejudice*, available at www.adl.org/prejudice/default.asp.

- Ask participants to make a list of the five most important things (a) the general public and (b) military personnel should know about prejudice and discrimination and the reasons why each is important. Tally how often various points are made and have participants discuss why some are mentioned more frequently than others.