

THE SCIENCE OF THE EQUITY SEQUENCE™

The research behind the practice that debiases and increases equity one question and one decision at a time



TIDAL EQUALITY

courage · candour · empathy · equality



THE BIRTH OF DIVERSITY TRAINING

Ever since the end of World War II, organizations - particularly in the United States - have been implementing diversity training of some sort.

In the post-war era, the workforce began diversifying at an increased rate. Women had entered the force to fill gaps left by men who were enlisted in the war effort, and were reluctant to return to the home and hearth. A great many resisted the social efforts to shepherd them back to domesticity. Meanwhile many women of colour who had already been participating in the workforce in undervalued and undercompensated roles, were pushed to return to those roles. At the same time, men of colour - who fought shoulder-to-shoulder with their white countrymen - returned from the war eager to take advantage of the same economic opportunities as their white peers. However, the laws and systems governing workplaces did not protect against discrimination, prejudice, and unequal treatment. In response, various disadvantaged and underrepresented groups formed social movements. They organized against systemic oppression in the civil rights, gay rights, and women's liberation movements.*

As these movements made legislative headway, each in its own ways and along various timelines, equality-in-employment laws were passing. Organizations across the U.S. and beyond were increasingly at risk of litigation and, as a means toward mitigating that risk, produced early versions of the "standard" diversity and inclusion interventions that have become ubiquitous today (Sodexo 2008).

NOTES:

These movements were not without their own divisions, along lines of class and race. The women's movement, notably, was largely lacking in an intersectional approach.

Diversity trainings were not, by and large, created by equity-seeking individuals with the intent of creating more equitable organizations, but by corporate actors in need of risk-mitigation provisions.



THE BIRTH OF DIVERSITY TRAINING, CONT'D

The equity, diversity and inclusion (EDI) interventions that emerged shared several features which remain the building blocks of the vast majority of diversity trainings today:

- They focus on the individual
- They are mandatory
- They are punitive
- They rely on bridging the “intent-action gap”
- They are divorced from existing business priorities

Poor Returns on the Usual Diversity Programs

The three most popular interventions make firms less diverse, not more, because managers resist strong-arming. For instance, testing job applicants hurts women and minorities—but not because they perform poorly. Hiring managers don't always test everyone (white men often get a pass) and don't interpret results consistently.

% CHANGE OVER FIVE YEARS IN REPRESENTATION AMONG MANAGERS

Type of program	White		Black		Hispanic		Asian	
	Men	Women	Men	Women	Men	Women	Men	Women
Mandatory diversity training				-9.2			-4.5	-5.4
Job tests		-3.8	-10.2	-9.1	-6.7	-8.8		-9.3
Grievance systems		-2.7	-7.3	-4.8		-4.7	-11.3	-4.1

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SOURCE AUTHORS' STUDY OF 829 MIDSIZE AND LARGE U.S. FIRMS. THE ANALYSIS ISOLATED THE EFFECTS OF DIVERSITY PROGRAMS FROM EVERYTHING ELSE GOING ON IN THE COMPANIES AND IN THE ECONOMY.
FROM "WHY DIVERSITY PROGRAMS FAIL," BY FRANK DOBBIN AND ALEXANDRA KALEV, JULY-AUGUST 2016

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For example, a standard “unconscious bias training” session might preach the “business case” for a diverse and inclusive organization, reveal facts about generalized inequities, identify for the (mandatory) participants their own personal implicit biases - perhaps by taking an assessment such as Harvard’s Implicit Association test - then identify points in organizational processes where implicit biases might affect decision-making, and finally implore participants to now leverage their awareness of their personal biases as a means to mitigate for them.


Since researchers began investigating diversity training five decades ago, the evidence points to the fact that interventions built on these elements are largely lacking in effectiveness. In fact, there is evidence showing they often have the opposite of the intended effects (Kulik 2000, Dobbin 2006).



FOLLOWING THE LEAD OF AN EQUITY POLICY TRAILBLAZER

A scholar, policy maker and doctor, Sir Michael Marmot currently holds the Chair of the Commission on Social Determinants of Health at the World Health Organization, and has been working to combat health inequalities for over 30 years.

In his work, he writes extensively on the Social Determinants of Health Equity. When confronted with claims that “lack of information” or “lack of research” were necessarily preventing action or slowing progress in regards to health equity, Marmot counters that:



There is an abundance of evidence showing the relationships between social and environmental factors and whole raft of health outcomes. There is also plenty of evidence about what to do and what works best internationally, nationally, and at local levels. We have plenty of practical evidence about short- and long-term action at a variety of administrative levels, for different populations and for countries at different levels of development in different parts of the world (Marmot 2014).

He argues that, instead of waiting for further, even more specific evidence, before taking action, that it was a moral imperative to draw on these various extensive bodies of research, and synthesize them for the diverse contexts in question.

Similarly, we have drawn on research that demonstrates what works, and what doesn't, to:

- engage individuals in equitable change,
- frame learning opportunities to maximize action potential, and
- produce systemic change.

In the following pages, we itemize and clarify the various features of our Equity Sequence™ methodology and the research that informs its design.

HOW TO WE DESCRIBE THE EQUITY SEQUENCE™?

When our leadership team - co-CEOs Anna Dewar Gully and Dr. Kristen Liesch - began shaping what would eventually become the Equity Sequence™ as it is today, we were inspired by the work of Sir Michael Marmot.

An Equity Sequence™ session brings participants together to learn how to expand equity in organizational decision-making by asking a series of powerful equity-focused and strategic questions - without judgement, and with curiosity and respect.

It focuses on a collaborative, collective effort that invites everyone to participate in the creation of greater equity.

The following pages describe, in detail, how the Equity Sequence™ methodology is a synthesis of various streams of research.



THE SCIENCE BEHIND THE EQUITY SEQUENCE™

EQUITY-FOCUSED VS. SPECIFIC DIMENSIONS OF DIVERSITY

Many EDI training programs focus on specific dimensions of diversity, like race, gender, age, ability, etc. Research exploring ‘framing’ effects show, however, that individuals react most positively to training descriptions with a broad focus spanning a large number of diversity dimensions (Holladay 2003, Kulik 2007). The Equity Sequence™ does not focus-in on a particular dimension - or set of dimensions - of diversity for a variety of reasons, including, but not limited to, the following:

- dimensions of diversity are intersectional,
- some dimensions of diversity are temporal, and
- the pursuit of a well-grounded understanding of the nuances, experiences, and particular oppressions related to single dimensions of diversity is a lifelong endeavour that can and should evolve and be enriched over time.

Instead, the Equity Sequence™ invites the individual to draw on their existing framework of understanding - and the understandings of those on their team - and invite to the analysis the consideration of various dimensions of diversity. A longer-term effect of this practice is the increasing awareness of gaps in understanding, gaining value from the perspectives of peers who engage in the dialogue, which collectively engenders a motivation for the individual to further increase their dimension-of-diversity-specific knowledge (Kulik 2007).



JOB-RELEVANT

Research demonstrates that “another strategy for exposing low skill employees to diversity issues might be to ‘yoke’ diversity training with other organizational training efforts” and objectives (Kulik 2007). Grounding EDI training inside the context of the organization and the work the individual does within the organization is shown to have beneficial effects on the employee’s perception of the training, as well as their likelihood to put the training into practice (Moore 1999). The Equity Sequence™ training situates the practice within the context of day-to-day operations and activities. In fact, the user (a) hears the Equity Sequence™ being applied in the context of a work process, (b) practices applying the Equity Sequence™ to a role-relevant case study of their choice, and (c) practices applying the Equity Sequence™ to an actual piece of work they are currently engaged in. Through this practice, the Equity Sequence™ is revealed to be relevant to day-to-day tasks and projects as well as broader organizational processes and systems.



GOAL-SETTING

Goal-setting has shown to have positive effects on enhancing the effectiveness of diversity-training programs (Madera 2013). The Equity Sequence™ weaves goal-setting into the final phase of the training. Once individuals have had an opportunity to become familiar with the five Equity Sequence™ questions, observe them in action, and practice using them, the individual is asked to consider whether they would like to apply the Sequence to their work, then look ahead into their near term and identify at least one opportunity to do so. At this point, the individual can imagine how the Sequence might play out in their day-to-day activities, whether they think the Sequence can be practically applied or not, and whether they predict the Sequence will add value to their work. The online version of the Equity Sequence™ has the capacity for our team to follow up with individuals and follow up on this goal-setting, as well as support them in deepening and qualifying their goals.

PERSPECTIVE-TAKING

Perspective-taking has a lasting positive effect on diversity-related outcomes (Lindsey 2015, Mor Barak 1998). These effects are partly due to the evidence that perspective-taking increases empathy (Rios 2003). During the Equity Sequence™ training, not only are individuals shepherded through a process of asking about “who” a “thing” (aka. process, product, event, piece of content, program, policy, communication, etc.) is designed by, for, with, and without - in order to consider the various individual and groups who are stakeholders - they are invited to listen to and learn from their colleagues and peers throughout the process of practicing the Sequence. As such, the Equity Sequence™ invites individuals to draw on and reflect on their own lived experiences, as well as those of other colleagues, within the organization during the process of identifying existing biases and opportunities for increasing equity.

PROBLEM-SOLVING

Research suggests that when individuals experience a sense of self-efficacy in a situation, they are more likely to develop an interest in the activity than are those who fail to develop such efficacy (Bandura 1981). Every time the Equity Sequence™ is applied, it is applied with the objective of reducing bias and increasing equity. The problem to be solved is the bias and inequality that is presumed to exist within any system, process, product, etc. The Equity Sequence™ is the tool the individual applies to uncover the bias and inequity, and then de-bias and build greater equity. De-biasing is effective when it includes: (a) the awareness of the possibility of bias (Equity Sequence question #1) and, (b) an understanding of the direction of the bias (Equity Sequence question #3) (Kahneman 1982). Because the Equity Sequence™ necessarily invites the contributions of other stakeholders (often, individuals discover this imperative when they apply question #2), participants benefit from “cooperative learning” (Aronson 1978), the outcomes of which include “interpersonal attraction, perspective taking, social support, and constructive management of conflict” (Paluck 2009). In short, the Equity Sequence presupposes an equity or bias “problem” and equips the practitioner to begin solving that problem as it often exposes a great number of ways to add to the solution. To date, the Equity Sequence™ has never been applied to a process, product, system, policy, etc. where opportunities for beginning to “solve” the bias / inequity problem weren't revealed.



ENGAGING "SYSTEM 2" THINKING

Daniel Kahneman writes of two systems of thinking, System 1 (reactive, intuitive, pattern-recognizing thought) and System 2 (deliberative, analytical “slow” thought). When we make biased decisions we are typically defaulting to System 1 thinking, which Kahneman describes as the Associative Machine (Kahneman 2011). Biases, both conscious and unconscious, are, in effect, shortcuts our brain takes when we think we recognize a pattern. Although biases cannot always be avoided, especially in oneself, we can identify them in systems and processes around us if we slow our thinking down and engage in deliberate thinking. Additionally, it is easier to spot biases in processes designed by others as opposed to by ourselves, so working the Equity Sequence™ collectively allows individuals to learn from peers in a non-confrontational way. In a live Equity Sequence™ training, all of the participants around the table are engaging in a deliberative/analytical thought process that kicks their System 2 thinking into gear. Even if practicing the Sequence alone, participants are often able to spot gaps in their thinking that are the result of a variety of cognitive biases, and then correct them.

SYSTEMIC VS. INDIVIDUAL FOCUS

The majority of EDI interventions are aimed at the individual - their individual biases and their personal behaviour. While we encourage individuals to explore and examine their own biases (both conscious and unconscious) and any associated prejudices or discriminatory/favourable behaviour, we understand that the intent-action gap is incredibly difficult to bridge (Pfeffer 2000). In other words, supporting an individual in the discovery and identification of their personal unconscious biases, then expecting them to act according to that knowledge, is a flawed model. Furthermore, the focus on the individual in regards to EDI has proven ineffective (Thomas 1997). Instead, when the focus is turned to the organization and the biases that may be inherent in its systems and processes, individuals no longer feel that they are what’s wrong with the system, but can approach that system with a critical lens toward identifying where bias may be inadvertently affecting the outcomes of the organization’s systems and processes (Moore 1999).

ENGAGE NATURAL CHANGE CHAMPIONS / VOLUNTARY PARTICIPATION

While there is some research to suggest that EDI training can have positive effects on “trainee knowledge about diversity and trainee diversity skills,” these positive effects can only be realized in voluntary diversity training initiatives, and if the training attracts the people most in need of the training” (Kulik 2007). In contrast, most organizational EDI trainings are mandatory and tend to target individuals who are at increased risk of exhibiting biased or discriminatory behaviours. As such, we advise organizations to provide Equity Sequence™ training first on a voluntary basis among natural change champions.

Because early anecdotal findings confirm that training in the Equity Sequence™ is an uplifting, engaging, and highly work-relevant experience, we believe that exposing it first to people who engage on a voluntary basis will increase the likelihood that others who are exposed to it in practice will become interested in taking the training at future opportunities.

ORGANIZATIONAL/BEHAVIOURAL DESIGN

Research on organizational and behavioural design reveal that “these designs can change behavior even though beliefs remain unchanged. Indeed, this is the very promise of behavioral design; it can change behavior by changing environments rather than mindsets” (Bohnet 2016). The working environment is constrained not only by physical space, but also by the processes, policies, programs, and various operations that shape the way people work and make decisions. The Equity Sequence™ is designed to be applied to organizational and behavioural design.

Additionally, it takes advantage of the positive effects of transparency and accountability as a strong driver of behaviour (Castilla 2015). When team members know and understand that the Equity Sequence™ is likely to be applied to any given work product, process or decision, it is more likely that the producer, process-designer or decision-maker will use the Equity Sequence™ in the first place (Kruglanski 1983).

PRACTICING EQUITABLE DECISION-MAKING

Research shows that the most successful workplace diversity programs are those with higher levels of continued engagement and accountability, such as task forces, for example. As such, we encourage organizations to engage Equity Sequence™ trainees as those individuals tasked with practicing and applying the Equity Sequence™, and we create “team” training and practice spaces available online for those individuals to support and encourage one another as well as to engage in shared problem-solving and goal-setting. The Equity Sequence™, while providing the individual with a new, more strategic set of skills, is truly designed to be a practice. It has been designed in a way that it can be repeated, again and again, while maintaining its relevance to the individual and to their organization over time.

Diversity Programs That Get Results

Companies do a better job of increasing diversity when they forgo the control tactics and frame their efforts more positively. The most effective programs spark engagement, increase contact among different groups, or draw on people’s strong desire to look good to others.

% CHANGE OVER FIVE YEARS IN REPRESENTATION AMONG MANAGERS

Type of program	White		Black		Hispanic		Asian	
	Men	Women	Men	Women	Men	Women	Men	Women
Voluntary training			+13.3		+9.1		+9.3	+12.6
Self-managed teams	-2.8	+5.6	+3.4	+3.9				+3.6
Cross-training	-1.4	+3.0	+2.7	+3.0	-3.9		+6.5	+4.1
College recruitment: women*	-2.0	+10.2	+7.9	+8.7		+10.0	+18.3	+8.6
College recruitment: minorities**			+7.7	+8.9				
Mentoring				+18.0	+9.1	+23.7	+18.0	+24.0
Diversity task forces	-3.3	+11.6	+8.7	+22.7	+12.0	+16.2	+30.2	+24.2
Diversity managers		+7.5	+17.0	+11.1		+18.2	+10.9	+13.6

*College recruitment targeting women turns recruiting managers into diversity champions, so it also helps boost the numbers for black and Asian-American men.

**College recruitment targeting minorities often focuses on historically black schools, which lifts the numbers of African-American men and women.

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HOW THE EQUITY SEQUENCE™ WORKS

The Equity Sequence™ draws on the above research and, in practice, is applied - generally - in the following way:

CONSULTATION & DESIGN STEP

We consult with organization stakeholders to better understand the types of challenges they're facing at the intersection of equity, and organizational success. We translate our learnings to the design of case studies that are uniquely relevant to the organization and its people.

THE EQUITY SEQUENCE™ PART ONE - The Digital Conversation

We invite participants to a pre-session digital discussion and survey space to pre-engage them in thought-provoking conversation and ignite their interest in the topics of bias, equity, and the organization's effectiveness and prosperity, and their peers' perspectives.

THE EQUITY SEQUENCE™ PART TWO - Live (or Digital) Training & Practice

Participants connect to the compelling reasons, both human and organizational, to advance equality, diversity, and inclusion in the organization's context.

Participants learn the Equity Sequence™, a series of focused questions they can apply individually and collectively when making key decisions - designing products, processes, policies, programs, services - that they can keep in their back pocket, literally!

Participants practice applying the Equity Sequence™, collectively, to the relevant and customized case studies we have designed for them. They have collaborative, effective, and engaging conversations about building equity, while applying their learnings to these real-life scenarios.

By the end of the session, participants have set goals and identified exciting near-term and real-world opportunities to apply the Sequence to the benefit of the organization, its culture, and the people it serves, and leave the room confident that building equity is possible, good for business, and uplifting. It is a collective effort that everyone participates in, equally.

FOLLOW-UP STEP

We provide key stakeholders with an aggregated list of the near-term opportunities participants identified to apply the Equity Sequence™ to the betterment of the business, its culture, and the people it serves, equipping you to follow up on and leverage those opportunities. We check in with participants 2 - 3 weeks post session to crystalize impact and action and remind them of the near-term opportunities they identified to apply the Equity Sequence™.



THE LOGISTICS

Our team can facilitate the live session in as little as 2 hours, with anywhere from 10 to 150 people. The online training is available for individuals or groups in a gamified, go-at-your-own-pace format. Our degree of post-training support varies.




WHERE DO WE GO FROM HERE?

The Tidal Equality team is currently in the process of engaging researchers in the design of a double-blind study to examine the short-medium- and long-term effects of the Equity Sequence™ practice.


Anecdotal evidence is encouraging. As a leadership team, we are committed to continuously improving our work, which includes the design and delivery - in its various forms - of the Equity Sequence™.




WHAT PEOPLE ARE SAYING

 "What I learned [is] that I take an equity analysis/process for granted in my own process...that I often teach, coach, educate others on it, but I have made assumptions about myself that have resulted in me overlooking some important equity pieces. The Equity Sequence™ provides a framework for thinking things through and naming what is and is not being considered and how to address the gaps."


~ Natasha Goudar, Strategic Equity Design Consultant

 Using the Equity Sequence™ not only supports our personal and professional values, but also makes for simply better business and stronger ideas for our clients.

- Kelsey Beniasch, Partner, Wagstaff International

 With the Equity Sequence™, we can translate intention into real change by applying the questions in a thoughtful way. The impact of this will be long-term and widespread.

- Bruce MacDonald, CEO, Imagine Canada

 It is a simple, straightforward and yet impactful process change that can help make the invisible visible. The Equity Sequence™ can help you discover your blind spots and ensure you are making better, more equitable decisions.

- Siri Chilazi, Research Fellow, Harvard Kennedy School, Women and Public Policy Program

ABOUT US

Tidal Equality is a growing strategy firm at the intersection of social change and diversity & inclusion.

From transformative conversations to transformational change, we equip people, organizations, and communities to build strategy and equality differently.

OUR APPROACH

Our services are bespoke, customized, and never one-size-fits-all. Off-the-shelf trainings, which are available to everyone (including your competition!), just don't create the kind of competitive edge we like to give our clients.

Our engagements are designed to uncover your unique challenges, to unlock the best ideas of your people, and to provide you with relevant and resonant, strategically-aligned next steps.

We work collaboratively with our clients to ensure a uniquely relevant approach.

CLIENT SNAPSHOT



Our Vision – an equal world in which all people reach their full potential

"We engaged Tidal Equality on a global Diversity & Inclusion initiative, leveraging their unique methodologies and concepts. Throughout each stage and milestone they provided insightful advice and impactful assessments that enabled us to dig deeper and finally arrive at a point where some clear strategic paths were created. If you want to get to the heart-of-the-matter, the team at Tidal is the one to call."

ALI NAJAFI, Director, Global Diversity & Inclusion,
Royal Bank of Canada

"The Tidal Equality team were truly powerful partners who were true to their core values of equality, empathy, candour and courage. They provided independent leadership to Wilson College of Textiles in revising and honing our entire strategy. What differentiates them from other consultants is that they rapidly built trust and helped guide our thinking in a focused way that enabled the entire college community to develop a deep understanding of our cultural challenges and opportunities. Through their innovative approach, they were essential partners in helping us build a roadmap for establishing a progressive, equitable culture and a strategy for success in achieving our renewed mission."

DAVID HINKS, PhD, Dean,
Wilson College of Textiles, NC State University

OUR FOUNDERS



ANNA DEWAR GULLY
Co-CEO
Tidal Equality

Anna Dewar Gully is co-CEO and co-founder of Tidal Equality.

Anna is an organizational strategist with 15+ years of experience designing enterprise-wide strategy, advising boards and leading on governance, leading transformation initiatives, and building greater equality in large systems and organizations in Canada, the U.S., Europe and the UK.

Throughout her career, Anna has guided numerous Boards of Directors, CEOs, and senior leaders through complex organizational culture, policy, governance, and strategic change initiatives. She has also coached frontline, management, and senior staff in a variety of contexts on how to successfully navigate and advance progressive change.

Anna has a BA from McGill University and a Masters Degree in Public Policy and Management from the University of London (UK).



DR. KRISTEN LIESCH
Co-CEO
Tidal Equality

Dr. Kristen Liesch is co-CEO and co-founder of Tidal Equality.

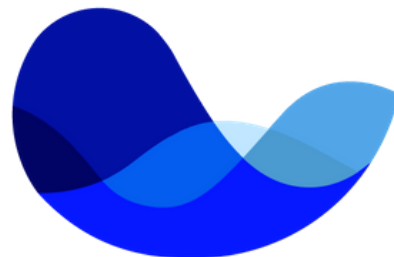
Named a Forbes Diversity & Inclusion Trailblazer, Kristen is a strategist and educator with 15+ years of experience designing transformative curricula, implementing equitable process changes, and capacity-building programs to support the design of more equitable organizations in Canada, the U.S., Europe, and New Zealand.

Her unique academic background in education and the multidisciplinary humanities informs her methodology as a strategist and consultant working to advance equity. Combining practices and theories from the social sciences, education, and interdisciplinary humanities, Kristen supports leaders as they work toward cultivating more equitable, effective, and prosperous organizations.

Kristen has a BEd from the University of Alberta and a PhD from the University of Auckland (NZ).

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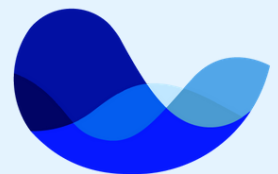
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