

THE SCIENCE OF THE EQUITY SEQUENCE™

The research behind the innovation practice that disrupts bias and increases equity one question and one decision at a time



TIDAL EQUALITY

curiosity · 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

NOTE GRAY INDICATES NO STATISTICAL CERTAINTY OF A PROGRAM'S EFFECT.
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 DO 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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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.
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HOW THE EQUITY SEQUENCE™ WORKS

The Equity Sequence™ is a **practice** designed to help your people and organization truly build equity - and ultimately equality - one question and decision at a time.

The Equity Sequence™ practice equips people to expand equity by asking a series of powerful equity-focused and strategic questions - without judgement, and with curiosity and respect. The innovative Equity Sequence™ focuses on a collaborative, collective effort that invites everyone to participate in the creation of greater equity and inclusion.



WHAT TO EXPECT

Our Equity Sequence™ learning platform is gamified, self-paced and focuses on experiential learning and practice as opposed to passive content consumption.

Learners connect to the compelling reasons, both social and organizational, to advance equity, diversity, and inclusion.

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

A dramatization introduces learners to how the Equity Sequence™ can be applied in practice. Then, in teams or collectively, learners practice applying the Equity Sequence™ to one or more relevant case studies of their choice before ultimately applying the Equity Sequence™ to work they're doing already, anyway.

In teams or by using the "Community" function, they can have collaborative, effective, and engaging virtual conversations about building equity, while applying and their learnings to these real-life scenarios.

By the end of the session, learners will have identified exciting near-term and real-world opportunities to apply the Equity Sequence™ to the benefit of your organization, your culture, and the people you serve. Learners come away feeling confident that building equity is possible, good for business, and uplifting.

[**CHECK IT OUT**](#)

WHAT PEOPLE ARE SAYING ABOUT THE EQUITY SEQUENCE™

The Equity Sequence™ is a **practical tool** that can be used across the entire organization. Staff from any level, any department, and any project can easily utilize the Equity Sequence™ to ensure we are being as fair and transparent as possible.

~ DANIELLE FERGUSON-SHIVRATTAN, Executive Engagement Coordinator, Imagine Canada



It really does provide a **framework** for those quick decisions that get pushed through. It can be part of a QA or audit process. Rarely do people make decisions looking at them from this lens. **Wouldn't it be great** if everything you launch had to pass the Equity Sequence?"

~ GEETHA RAHUPATHY, Leadership Development Expert & Adult Educator, HydroOne

I used the Equity Sequence™ just in the last few days when thinking through the structure of a team objective. It's **simple, immediately practical**, and based on **hard evidence**.

~ MARYANN WELKE LESAGE, Chief Enterprise Architect, Diversity & Inclusion Advocate, University of Ottawa



I'm applying the Equity Sequence to revamping my **selection and recruitment process** to ensure it's fair and **equitable**, and able to position that as a differentiator for my clients.

~ KRIS JOHNSON, Founder, Epoch Recruiters

[CHECK IT OUT](#)

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