

Inclusive Leadership Shadow Assessment

PURPOSE

Support leaders in assessing and understanding the degree to which others are experiencing their actions, skills and mindsets as inclusive.

DIRECTIONS:

1. Read the introduction and preview the tools available in this toolkit.
2. Complete the leadership self-assessment.
3. Distribute the inclusive leadership to others, including a diverse representation of the people with whom you interact daily.
4. Complete the reflection guide using what you learned from both your self-assessment and the stakeholder survey.

Introduction

Leaders today understand that diversity positively influences team performance and increases organizational success. “Why? Because research shows that diversity of thinking is a wellspring of creativity, enhancing innovation by about 20 percent. It also enables groups to spot risks, reducing these by up to 30 percent. And it smooths the implementation of decisions by creating buy-in and trust” (Bourke, 2018).

However, leaders must understand that for this to be true, diversity needs to be paired with inclusion. When diversity is paired with inclusive culture, organizations are two times more likely to meet or exceed financial targets, three times more likely to be high-performing, six times more likely to be innovate and agile, and eight times more likely to achieve better business outcomes (Bourke, 2018).

Specifically, it is the behaviors of inclusive leaders that really drive this effect. In a study of 105 leaders assessed by 600 raters, it was found that individuals working with the mostly highly rated inclusive leaders reported a 70% increase in experience of fairness, respect, value, belonging, psychological safety and inspiration compared to those working with the lowest-rated inclusive leaders. In addition, the teams working for the most inclusive leaders also reported increased team performance, decision-making quality and team collaboration (Bourke, 2018).

While leaders may wish to become more inclusive, many simply do not know whether others experience them as inclusive. Leaders may also struggle to understand which behaviors might impact the degree to which others view or experience them as inclusive. To gain those insights, leaders will need to both self-reflect and seek input and feedback from others. Think of this as getting to “know your inclusive leadership shadow” (Bourke & Titus, 2019).

Tool Preview

In this toolkit, leaders will find three tools designed to support them in getting to know their inclusive leadership shadow. It is recommended you use these tools together as part of a three step-process.



Inclusive Leadership Self-Assessment

Self-Assess

Use the following set of questions to assess how inclusive you believe your actions, skills and mindsets are. Please note, this self-assessment is intended to be a starting place for reflection and does not capture all possible inclusive leadership actions, skills and mindsets. There is blank space at the bottom to capture any additional thoughts prompted by this self-assessment.

Directions

Below, you will read a series of statements. On a scale from 1–5 (1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree), please rate whether you agree or disagree with the statements. If you would like to capture specific examples or more detailed thoughts, please use the notes space.

Question	Rating (1-5)	Notes
1. I see the value of including others and seeking out diverse perspectives. Meaning I ...		
... include diverse perspectives on my teams and in my working groups		
... put myself in proximity to those who are closest to the work		
... make visible my personal commitment to diversity and inclusion		
... seek to understand others, especially across lines of difference		
2. I influence our organization to be more inclusive and seek out diverse perspectives. Meaning I ...		
... model inclusive moves I want others to make and teach others how		
... articulate reasons why being inclusive is important to the work we do		
... challenge the status quo, especially any exclusionary systems or practices		
... hold others accountable through feedback about diversity and inclusion		
3. I create psychologically and identity safe environments for others. Meaning I ...		
... make it safe to speak up or make mistakes without fear of retaliation		
... admit mistakes and apologize when needed		
... demonstrate attentiveness to others' identities and cultures		
... make others feel like they can be their unique, authentic selves at work		

4. I use my influence to create opportunities for others. Meaning I ...		
... invite others to be at the table, especially when decisions are being made		
... create space for equity of voice during conversations		
... pay attention to diversity of thinking in group settings and share noticings		
... provide opportunities for growth and participation without favoritism		
5. I facilitate connection with others personally and among others on teams. Meaning I ...		
... schedule regular check-ins with others to see how they are doing		
... make others feel like they belong in the organization, on a team, etc.		
... facilitate connectivity and collaboration among individuals on teams		
... facilitate connectivity and collaboration across teams		
6. I am aware of my impact on others. Meaning others would say I ...		
... treat them fairly and respectfully		
... make them feel valued, seen and heard		
... ask them for feedback on my leadership		
... am aware of my biases and blind spots and work to counteract them		
7. Other thoughts/ideas you want to add here:		

Inclusive Leadership Stakeholder Survey

Investigate

Distribute the following survey to a variety of collaborators and stakeholders. Aim to have at least 3-5 individuals complete this survey, including those who are different from you (*in role, identity, etc.*). To create an anonymous survey, you can print copies and instruct participants to return it without names or you can create an anonymous Google form using these questions.

Enter Leader's Name (*I am completing this survey for...*)

Directions

Below, you will read a series of statements about the leader who gave you this survey. On a scale of 1–5 (1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree), please rate whether you agree or disagree with the statements. If you would like to capture specific examples or more detailed thoughts, please use the notes space.

Question	Rating (1-5)	Notes
1. This leader sees the value of including others and seeking out diverse perspectives. Meaning this leader ...		
... includes diverse perspectives on their teams and in their working groups		
... puts themselves in proximity to those who are closest to the work		
... makes visible their personal commitment to diversity and inclusion		
... seeks to understand others, especially across lines of difference		
2. This leader influences our organization to be more inclusive and to seek out diverse perspectives. Meaning this leader ...		
... models inclusive moves they want others to make and teaches others how		
... articulates reasons why being inclusive is important to the work we do		
... challenges the status quo, especially any exclusionary systems or practices		
... holds others accountable through feedback about diversity and inclusion		
3. This leader creates psychologically and identity safe environments for others. Meaning this leader ...		
... makes it safe to speak up or make mistakes without fear of retaliation		
... admits mistakes and apologizes, when needed		
... demonstrates attentiveness to others' identities and cultures		
... makes others feel like they can be their unique, authentic selves at work		

4. This leader uses their influence to create opportunities for others. Meaning this leader ...		
... invites others to be at the table, especially when decisions are being made		
... creates space for equity of voice during conversations		
... pays attention to diversity of thinking in groups and shares noticings		
... provides opportunities for growth and participation without favoritism		
5. This leader facilitates connection with others personally and among others on teams. Meaning this leader ...		
... schedules regular check-ins with others to see how they are doing		
... makes others feel like they belong in the organization, on a team, etc.		
... facilitates connectivity and collaboration among individuals on teams		
... facilitates connectivity and collaboration across teams		
6. Overall, I would say this leader ...		
... treats me and others fairly and respectfully		
... makes me and others feel valued, seen and heard		
... asks me and others for feedback on their leadership		
... is aware of their biases and blind spots and works to counteract them		
7. Other thoughts/ideas you want to add here:		

Inclusive Leadership Reflection Guide

Reflect

Answer the following questions using the results of both your self-assessment and the stakeholder surveys. In your reflections, resist the urge to average any of the ratings. It is more important in this reflection to notice where others agree or disagree. “To be an inclusive leader, one must ensure that everyone agrees or strongly agrees that they are being treated fairly and respectfully, are valued, and have a sense of belonging and are psychologically safe” (Bourke & Titus, 2019).

1. What do you notice about **areas of strength** in your inclusive leadership actions, skills and mindsets?

2. What do you notice about **areas for growth** in your inclusive leadership actions, skills and mindsets?

3. What sorts of **similarities or differences** did you notice when comparing your self-assessment and your stakeholder surveys? Why do you think those similarities or differences exist?

4. How do you think the trends you are noticing are **impacting others/you/the organization/the work**?

5. What is one thing you want to **act on prompted by these reflections**? What, specifically, will you do to get started? How will you hold yourself accountable to the action you identified? What will success look like?

References

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