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Core Concepts

**Diversity**
The variety of visible and invisible ways in which people differ from each other. Diversity includes (but is not limited to) the following characteristics: race/ethnicity, gender and gender identity, age, sexual orientation, religion, socio-economic status, ability/disability, accent, national origin, and body size.

**Equity**
The fair treatment, access, and opportunity for all people.

**Inclusion**
An environment in which everyone is welcomed, respected, supported, and valued to fully participate. Verna Myers says, "if diversity is being invited to the party, inclusion is being asked to dance."

**Harassment**
Harassment is unwelcome conduct that is based on race, color, religion, sex (including pregnancy), national origin, age (40 or older), disability or genetic information.
https://www.eeoc.gov/laws/types/harassment.cfm

**Sexual Harassment**
Unwelcome sexual advances, requests for sexual favors or other verbal, non-verbal or physical conduct of a sexual nature. Sexual harassment may take the form of:
- Quid Pro Quo. Supervisor/Manager threatens to withhold or promises to give employment benefits in exchange for sexual favors
- Hostile Environment. Behavior of a sexual nature creates an intimidating, hostile, or offensive working environment and interferes with an employee’s work performance
- Indirect or Third-Party. Employees are engaging in behavior that is welcome to them, but the behavior may not be welcome to others around them
- Harassment of or by Non-Employees
  (https://www.eeoc.gov/laws/types/sexual_harassment.cfm)

**Sexual Assault**
Sexual contact or behavior that occurs without explicit consent of the victim. Some forms of sexual assault include: Attempted rape, fondling or unwanted sexual touching, forcing a victim to perform sexual acts, such as oral sex or penetrating the perpetrator’s body, or penetration of the victim’s body, also known as rape.
(https://www.rainn.org/articles/sexual-assault)
Implicit Bias/Unconscious Bias
Attitudes or stereotypes that affect our understanding, actions, and decisions in an unconscious manner without awareness, intention, or control.

Stereotype
A widely held but fixed and oversimplified image or idea of a particular type of person or thing.

Micro-Messages
Small, subtle messages we send and receive verbally and non-verbally.

Micro-affirmations
Subtle or apparently small acknowledgements of a person's value and accomplishments.

Micro-inequities
Subtle, often unconscious, messages that devalue and discourage people based on some aspect of their identity. They are conveyed through facial expressions, gestures, tone of voice, choice of words, nuance and syntax.

Allyship
the continuous process in which someone with privilege and power seeks to first learn about the experiences of a marginalized group of people, and then ultimately empathize with their challenges and build relationships with that group of people.

Sexual orientation
An inherent or immutable enduring emotional, romantic or sexual attraction to other people.

Gender identity
One's innermost concept of self as male, female, a blend of both or neither – how individuals perceive themselves and what they call themselves. One's gender identity can be the same or different from their sex assigned at birth.

Gender expression
External appearance of one's gender identity, usually expressed through behavior, clothing, haircut or voice, and which may or may not conform to socially defined behaviors and characteristics typically associated with being either masculine or feminine.

Transgender
An umbrella term for people whose gender identity and/or expression is different from cultural expectations based on the sex they were assigned at birth. Being transgender does not imply any specific sexual orientation. Therefore, transgender people may identify as straight, gay, lesbian, bisexual, etc.
Gender transition
The process by which some people strive to more closely align their internal knowledge of
gender with its outward appearance. Some people socially transition, whereby they might begin
dressing, using names and pronouns and/or be socially recognized as another gender. Others
undergo physical transitions in which they modify their bodies through medical interventions.
https://www.hrc.org/resources/sexual-orientation-and-gender-identity-terminology-and-
definitions

Background data that reinforces the reality of the scenarios
NewPoint conducted a series of interviews with individuals from across the CCAR community to
gather common experiences people have observed or experienced related to diversity and
inclusion, with a specific focus on gender equity. NewPoint also integrated themes from cases
developed by the CCAR Task Force on Women in the Rabbinate, illustrating common
experiences women leaders face. These two methods ensured that the scenarios provided are
relevant and representative of the diversity and inclusion challenges on which CCAR leadership
should focus.

In addition to this facilitator guide and the scenarios, NewPoint has developed Resources and
Research Related to Bias in Clergy and Leadership Selection, which provides in depth
resources, including articles, books, videos, and other materials related to unconscious bias that
can be helpful to facilitators as they continue this work.

Facilitating the Dialogue Process

Dialogue vs. Debate vs. Discussion

The way we approach our interactions with others will dictate the outcomes.

In discussion, the goal is to present ideas, share information, and/or persuade others. Typically
in discussion one tries to avoid silence. In discussion, acknowledgement of feelings is often
avoided. One listens with intent to identify disagreement.

In debate, the goal is to win, to defend our opinion or idea, to point out the flaws in others’ logic,
and to argue for what we believe is right and wrong. Typically in debate silence is only used to
gain advantage. In debate, feelings are either discounted or invalidated. One listens to refute.

In dialogue, the goal is to broaden perspectives, share views, build trust, and explore common
ground. Typically in dialogue silence is honored as part of the interaction. Feelings are validated
and explored. In dialogue, one listens to understand and empathize.

Psychological Safety
Harvard Business School professor Amy Edmondson coined the term psychological safety, which is a "shared belief held by members of a team that the team is safe for interpersonal risk-taking."

Psychological safety is "a sense of confidence that the team will not embarrass, reject or punish someone for speaking up."

Groups that have psychological safety build interpersonal trust and mutual respect, where everyone feels equally able and comfortable to be and express themselves.

Facilitators can help build psychological safety by doing the following:

- Set the stage - make sure everyone is clear and committed to the mission/goals/purpose
- Invite engagement - encourage everyone to share their ideas, concerns, thoughts, even if they're not sure they will be 100% right.
- Respond productively - listen with intent to contributions, allowing people to make mistakes or have half-baked ideas without punishment or judgment, offering constructive feedback.
- Shared air time - encourage every individual member to contribute on average an equal amount to conversations.
- Observe and check in on emotional states - notice verbal and non-verbal cues that clue you in to how someone might be feeling. For example, if someone is looking down and not speaking, check in to see what they are thinking. If someone has a furrowed brow, or crossed arms, notice that and check in. "I am wondering what your perspective is on this?"
- Show your vulnerability - Be willing to divulge information about yourself to build connection and trust. Acknowledge when you don’t have the answers or when you have made mistakes or had your own blind spots.

Preparing to facilitate dialogue

1. Logistics - Time/place/size of group

Consider the time and location that will be most convenient and comfortable for participants. For example, if you hold the dialogue session on a weekday evening, for whom is that easy or difficult to attend? Working parents, or people who work in the evenings, may not be able to participate.

Consider the duration of the dialogue session. We recommend 1½ to 3 hours, and if necessary, use 2 shorter sessions to accommodate tight schedules. You want to include time to set norms and get people comfortable with one another, to engage in focused conversation, and to wrap up the dialogue, resolve any issues or concerns, and commit to next steps.
We generally recommend a group of between 6-12 participants to provide adequate time for each person to talk. You could make the group larger if needed but then consider breaking participants up into smaller groups of 4-5 to provide adequate air time for all. These dialogues can also be conducted in a virtual setting using a platform such as Zoom. If you decide to go with a virtual dialogue, make sure everyone has good Internet access and set norms up front about video and audio and how people will be expected to participate.

2. **Prepare participants (pre-work, objectives, expectations)**

Decide how you will invite people to participate. Is it an open invitation or are you asking select people to attend? What is the best way to invite/advertise the dialogue session?

Consider providing an article or other resource to provide a baseline of awareness of the topics to be covered and why the conversation is important. You may wish to select from the “Resources and Research Related to Bias in Clergy and Leadership Selection.” (link here). Other suggestions are:

- "Is This How Discrimination Ends?" *The Atlantic, 2017*
- Invite people to take a couple versions of the [Harvard Implicit Association Test](https://www.projectimplicit.org/implicit Tester/)

3. **Prepare yourself (get mentally and emotionally centered)**

Facilitating dialogues on diversity and inclusion requires an enormous amount of mental and emotional energy. These dialogues are a rich opportunity for connection but you are also asking people to make themselves vulnerable, to explore the potential gap between their deeply held values and their implicit attitudes, and to be open to contradictory perspectives and views. These expectations naturally raise the level of cognitive dissonance and discomfort for people.

Take time in the days, hours, and minutes before the dialogue to adjust your mindset. Engage in deep breathing exercises, take a mindful moment before people arrive to harness your positive energy and strength.

**Practices for facilitation**

1. **Co-create Norms.** You can propose norms for the dialogue (see sample norms below) or if time permits, invite the group to create its own norms. At the very least, ask participants if there are any norms they wish to add to the list and then get commitment from all.
2. **Stay neutral and calm.** As a facilitator, it’s possible you may have an emotional reaction to something that is said. The moment you begin to debate or offer your personal opinions, you compromise your status as a facilitator. Be sure to manage your emotional reactions and create space for everyone to share their perspectives.

3. **Powerful Questions.** Ask open-ended, simple questions to invite dialogue. Avoid “yes/no” questions or long, complicated questions. Some common powerful questions may include:
   a. “Can you expand on that a bit?” or “Please say a bit more.”
   b. “How does that impact you?”
   c. “What are your thoughts/feelings/perspectives on this?”
   d. “What has been your experience?”
   e. “Who here has a different experience or perspective to share?”
   f. “How do you define [respect, common sense, etc] and how might others define it differently?”

4. **Active Listening.** Listening is one of the most important components of effective facilitation. Active listening requires you to listen not with the intent to respond or rebut, but to understand and empathize with the other person. This requires a great deal of mental effort, to minimize distractions and be fully curious about another person’s ideas. Active listening means suspending your own judgments or assumptions and opening your mind to other views. You can demonstrate active listening by using neutral facial expressions, open body posture, and open-ended questions.

5. **Encourage equal participation.** In dialogue, it is important to ensure everyone has an opportunity to be heard. Often, there are one or two individuals who may feel more comfortable sharing their opinions and stories, and they can not only hijack the time but also create a chilling effect for others who may not feel as comfortable sharing their ideas in front of a group. Consider either a “round robin” approach where each person gets a chance to speak. You can also just manage the talkers by saying, “Thank you. I really want to make sure we hear from everyone so if we can please give the floor to someone else now.”

6. **Encourage respectful dissent.** Dialogue is not about everyone agreeing. When discussing these scenarios, it is probable that people will have different experiences and perspectives and that is a good thing. However, manage conversations so people disagree in service of the group learning, not to win an argument or prove the other party wrong.

7. **Allow for silence.** We are often driven to fill any spaces in a conversation with words. Silence can be a powerful tool in dialogue. Sometimes people need a few moments to reflect on a question, or get up the courage to share their opinion. Silently count to 5, or
maybe even 10, before you move on. You will be surprised what new insights or voices come forth when you give some space for silence.

8. **Know when to bring closure.** Because there is no one clear answer to many of these issues of identity, it can be difficult to know when to close the dialogue. Yet it is imperative to take a few minutes before everyone departs to bring some closure and resolve any hanging issues. Take a few minutes as the dialogue is winding down. You can do so by asking:
   a. “What has not been said that needs to be before we close out this dialogue?”
   b. “Now that we have explored this topic and heard from one another, what commitments do we want to make to move forward?”
   c. [take notes on a chart or in a notebook of key themes/perspectives] “Let’s look at the themes I have captured as you all talked. What resonates with you? Did I miss anything?”
   d. “What do we need to continue to explore after today as a group?”

**Norms for Effective Dialogue**

It’s always a good practice to invite the group to establish their own communication norms, but if time is of the essence you may want to introduce a set of norms and ask for agreement from all participants.

Common norms:

- **Listen to understand others**
  - Quite often when we listen to someone else speak, we are planning our own response. Listening to understand the other person requires interrupting this tendency to focus on your own thoughts, and instead being truly present with what the speaker is communicating.

- **Honor confidentiality**
  - In this session, we encourage everyone to share from their own experience, and sometimes that involves discussing sensitive issues. Please do not share other people’s experiences outside of the session. It is ok and encouraged to share what you’ve learned, but not ok to share specifics that would violate confidentiality.

- **Interrupt your assumptions or judgments**
  - While we often automatically jump to conclusions without having complete information, we ask that you notice when you are making assumptions or judgments, and then put those assumptions aside. Listen deeply and if you don’t understand something, lean into curiosity instead of judgment.

- **Use “Yes, and” thinking**
○ We often use the word “but” when responding to someone else’s comment. This negates people’s perspectives and creates a defensive stance. Instead, try acknowledging the other person’s perspective and then adding to it by saying, “yes, and…”

● Participate fully
  ○ The more you engage in this session, the more you will learn. Your participation can enrich the learning experience of everyone involved.

● Share air time
  ○ While you may have a lot of energy around the topics we’re discussing in this session, please be mindful to allow space for everyone to share their perspective. When a small number of people dominate the discussion, others may very well feel unheard and check out.

● Disagree respectfully
  ○ We will not agree about everything, and that is ok. We only ask that you disagree in a way that honors the other person and is in service of this learning community.

● Use “I” statements
  ○ It’s tempting to say “we” and attempt to speak for an entire group. Please speak from your own experience by using “I” statements.

● Speak from the heart as well as the head
  ○ Talking about implicit bias and our own identities is not just an intellectual exercise. We need to tap into the emotions we have around these issues and speak from the heart.

● Ask questions with the intent to learn
  ○ When you don’t understand something or need more clarity, please speak up and ask questions. When questions are asked with the intent to learn (and not accuse or judge), the entire group can benefit.

**Tips for Responding to Sensitive Issues**

1. **If someone cries.**
   Discussing diversity, equity, and inclusion (DEI) issues can bring up painful emotions that manifest in the form of tears. That is ok. If someone in the group tears up, you may want to pause the discussion and offer them a tissue. Then acknowledge that what the person is sharing is difficult to talk about. Ask the person if they’d like to share what feelings are coming up for them in the moment. If the person needs to leave the room, by all means give them the opportunity to do so. Also check in with the rest of the group to see how they were impacted by the person who cried. What feelings does that person’s experience bring up for others? Acknowledge to the entire group that discussing DEI issues can be challenging, and that engaging in open and healthy dialogue can help us move through those challenges to learn and grow.
2. **If someone gets angry.**
   Sometimes the emotions that come up in a session are expressed with anger (raised voice, reddening of the face, etc.). If someone becomes visibly angry in the group, pause the discussion and acknowledge the emotion around whatever is being discussed. Invite everyone in the room to take a few deep breaths. Remind the group about the norm of disagreeing respectfully. Then ask the person where the strong feelings are coming from. Ask others in the group how they were impacted by this person’s expression of emotion. Acknowledge to the entire group that discussing DEI issues can be challenging, and that engaging in open and healthy dialogue can help us move through those challenges to learn and grow.

3. **If someone leaves the room.**
   If someone leaves the room unexpectedly, you may want to find an appropriate time soon thereafter to pause for a short break and go check on the person to see how they’re doing. If they’re not able to return the group, ask them what they’d like you to tell the group about their absence.

4. **If someone hijacks the conversation.**
   Politely interrupt the person by expressing appreciation for their energy and emphasizing the norm of sharing airtime. Say that you want to make sure that everyone in the group has an opportunity to share their perspective.

5. **If someone doesn’t talk or participate.**
   Create opportunities for pair and small group discussion which can be more comfortable for some than large group discussions. Observe to see if the person is engaging in the pair and small group activity. If they are not engaging in that context, you may want to check in with them individually during a break to see how they are experiencing the session. In large group discussions, rather than singling out someone who has not said anything, ask if there is anyone who has not yet shared their perspective that would like to do so. That creates space for the person to voluntarily participate in the discussion rather than being put on the spot.

6. **If someone attacks another person’s character.**
   Remind the group of the norms of interrupting assumptions and judgments, disagreeing respectfully and using “I” statements. It is not ok to attack another member of the group. Ask the person to rephrase their concern by talking about how the other person’s behavior may have impacted them. “When you said _______, I felt _______.

7. **If someone makes a culturally insensitive or inappropriate comment.**
   It is very important to respond in the moment if someone makes an insensitive or inappropriate comment. Ignoring such comments can have a very negative impact on the group by implying the comment is ok and dismissing the impact on some members.
of the group. To respond, you can say something like “Ouch, I don't think you intended to be offensive, but what you just said did not land right. Let me explain why.”

8. **If the group goes down a tangent/loses focus.**
   Take a pause in the discussion to acknowledge that while this tangent is very interesting, we want to focus on _______ with the limited time we have. Summarize the discussion thus far and focus back on the main topic.

9. **If you as facilitator get emotionally triggered.**
   It’s possible that some of the discussion will touch on issues that personally affect you, and you may get emotionally triggered. Pay attention to the physical manifestation of your emotions - do you clench your fists, feel a tightness in your throat, get red in the face, feel a knot in your stomach, tear up? When you notice any of those signs, take a few deep breaths. You may even need to acknowledge to the group that the discussion is bringing up difficult emotions for you and explain where they are coming from. As a facilitator, you don’t want to be the center of attention. However, you are human and acknowledging your own vulnerability helps to create psychological safety for others to share their vulnerability.

**Resources on Dialogue and Facilitation**

https://coachingforleaders.com/facilitate-great-conversations/

