



# The Equity, Diversity and Interdependence Framework

## A Framework for Organisational Learning and Change



EU Programme  
for Peace and Reconciliation



INTERNATIONAL FUND  
FOR IRELAND

Community Relations Council



counteract



# The Equity, Diversity and Interdependence Framework

## A Framework for Organisational Learning and Change

Developed within the Not-for-Profit and Public Sectors  
in  
Northern Ireland

by

Karin Eyben, Duncan Morrow, Derick Wilson (UU)

and

Billy Robinson (Counteract)

(with assistance from Pascal McCulla (DFP))



Community Relations Council





INTERNATIONAL FUND  
FOR IRELAND

This **publication** has been made possible with financial support from the International Fund for Ireland (Community Bridges Programme).

The Community Bridges Programme of the International Fund for Ireland aims to support groups and organisations which promote greater dialogue and understanding and tackle issues of division between people from different cultural and religious traditions within Ireland. The Programme, which is dedicated to supporting specific strategic and innovative community relations and cross border practice on the island of Ireland, is proactive in bringing forward projects which address the needs and gaps in provision not catered for by the statutory bodies.

Under the Programme priority is given to four different areas:-

- community based initiatives seeking to address issues of conflict and division, particularly in interface areas;
- intermediary groups or non governmental organisations whose main task is to develop the capacity of communities or organisations to address issues of conflict;
- networks which may combine to cover particular geographic locations or concentrate on specific social policy themes;
- and finally developing appropriate community relations dimensions and policies within institutions or across entire sectors of society.

© Karin Eyben, Duncan Morrow, Derick Wilson (Future Ways Programme, University of Ulster) and Billy Robinson (Counteract)

Cover image from original painting by Gary Devon ([www.garydevon.com](http://www.garydevon.com)) used with permission.

ISBN 1-85923-160-8





## ACKNOWLEDGEMENTS

We wish to acknowledge and thank:

The Northern Ireland Community Relations Council whose grant aid under Measures 4.5 and 4.6 of the European Special Support Programme for Peace and Reconciliation through the Learning Fund was central to this exercise. We are very grateful for the vision and support of the European Programme Committee of the Council and to Mark Adair, the Director of the European Programme.

Community Relations Council



**EU Programme  
for Peace and Reconciliation**

The International Fund for Ireland (Community Bridges Programme) in encouraging Future Ways and Counteract to apply the principles of Equity, Diversity and Interdependence (EDI) to organisational change and for their funding support to the Understanding Conflict Trust for publishing materials to assist advocacy and learning about the incorporation of the EDI principles into organisational practice. (see back cover for associated documents)



INTERNATIONAL FUND  
FOR IRELAND

The Community Relations Unit in the Office of the First Minister and Deputy First Minister for an essential research grant to underpin this Framework and the Public Service Improvement Unit, also in this Office, for their early support in advocating this work.

The Understanding Conflict Trust for their continuing support to the Future Ways Programme., based at the University of Ulster.

The Management Committee of Counteract.

The support of the Department of Finance and Personnel of the Northern Ireland Civil Service.

Pascal McCulla who was seconded from the Department of Finance and Personnel, Northern Ireland Civil Service to work on the EDI Framework (January 2000 - April 2001).

Craig Cameron, former Du Pont (UK) Personnel Director, who provided specialist advice, support and encouragement on a pro bono basis.





## ACKNOWLEDGEMENTS TO SEMINAR SPEAKERS

We thank the following people who led seminars with staff from the Not-for-Profit, Public and Private Sectors during 2000/01.

**Craig Cameron** - Former Director of Personnel, Du Pont Limited (UK)

**Jane Elliott** - The originator of the US prejudice training film "Blue Eyes - Brown Eyes"

**David Hinstridge** - Director of Inland Revenue for Northern Ireland (until 2001)

**Jean Horstman** - Chief Executive for the Society for Organisational Learning (until 2001)

**Nick Montagu** - Chair of the Inland Revenue

**Janet Smith** - Commissioner for the Diversity Programme with the Canadian Public Service

**Ranjit Sondhi** - BBC Governor and Senior Lecturer, University of Birmingham





## THANK YOU

This Framework for Organisational Learning and Change has emerged from many hours of work with many different partners.

Counteract and Future Ways took the initial **Creative Step** forward with encouragement from Peter Small, Permanent Secretary, Department of Agriculture and Rural Development and Chair of the Diversity Working Group in the Northern Ireland Civil Service.

**Advancing** and **Refining** of the approach took place through a number of pilot discussions and programmes with:

- The Chair of the Inland Revenue, Nick Montagu
- The Director and Senior Management Team of the Inland Revenue Northern Ireland
- The Rural Community Network Senior Management
- Dr Aileen McGinley, Permanent Secretary, Department of Culture, Arts and Leisure and her staff
- Mediation Network for Northern Ireland
- Newry and Mourne District Council - the REDI project
- Coleraine Borough Council - the CREDI project
- Ballymena Borough Council
- Eircom
- NIACRO
- The Chief Executives and nominated Councillors to the Western Routes Civic Leadership Programme covering Cookstown, Dungannon, Fermanagh, Omagh and Strabane
- The Young Farmers Clubs of Ulster
- The National Council of the YMCA in Ireland
- The Central Council for the Education & Training for Social Workers (NI), now the NI Social Care Council, DHSSPS and local Social Services Boards and Trusts
- Triangle Housing Association
- The Northern Ireland Museums Council
- Armagh Churches' Forum
- Belfast European Partnership Board
- Public Service Seminars arranged by Counteract / Future Ways and the Department of Finance and Personnel.

**Executing** the learning and practice into this Framework is entirely the responsibility of Future Ways and Counteract.

**Incorporating** this work into the practice of organisations is an invitation to all.

We also thank Stephen Bloomer, Tony Andrew, Teresa Moley, Harry McConnell and Niall Fitzduff for proof reading the final document and Loretto Blackwood for ensuring the document went to press.





## CURRENT REALITIES

The EDI Framework invites an organisation to work with the critical tension between the Current Realities it is dealing with and the Future Vision the organisation is working towards. This is developed through the medium of a Critical Dialogue structure.

### CURRENT REALITIES

For over thirty years, Northern Ireland has been grappling with a set of local, economic conditions dominated by conflict and lack of trust. The economic and social costs have been significant.

- People have readily become reduced to single identities with an often limited capacity of forming meaningful relationships and networks beyond immediate family, local community and friends.
- The range of contexts and possibilities for learning has become diminished which impacts on access to resources, employment, knowledge, information and ultimately, society's capacity for innovation and exploitation of new opportunities.

Many organisations in the Not-for Profit, Public and For-Profit sectors have survived for more than thirty years by avoiding the political and community context within which they operate.

This has often created workplaces that are:

- Implicitly **partisan** where one majority culture or tradition dominates.
- **Neutral** where differences are sacrificed for the sake of harmony.
- Open to those who are different as long as they remain '**pigeon-holed**' on the periphery of mainstream working practice.

## CRITICAL DIALOGUE

This critical dialogue means that:

- The process is first and foremost the protection and development of a quality of relationship that allows real dialogue and more honest and open relationships.
- The dialogue is about locating the business of the organisation within a wider framework of building a cohesive, stable and sustainable society.
- Sustainability requires that the work process is value led. This ensures an integrity of voice and practice.
- The voice of the excluded or minority perspectives are given space.





## THE VISION OF THE EDI FRAMEWORK

An organisation<sup>1</sup>

- Which strives towards fair representation of men and women and wider diversity at all levels.
- Where people feel valued and of worth, enabling them to more fully contribute to the organisation.
- Where there is an absence of fear and humiliation within and 'outwith' the organisation.
- Which strives towards ensuring a balanced work, home and community life.
- Where there is a capacity to respond to changing environments and generate new possibilities.
- Where ideas come from different people at different levels, areas of work and experiences towards actively including those voices that are currently marginal in decision making.
- Where people feel free to experiment, take risks and are open about their mistakes, achievements and results.
- Which holds a relational understanding of its place and purpose and has effective communication systems across all levels and teams.
- Which ensures empowerment and accountability at all levels, and values the different perspectives formed by gender, ethnic, racial, political, age, class and sexual orientation.
- Which is community and client centred, concerned with eliminating discrimination, treating people fairly and building a wider sustainability.

## CRITICAL DIALOGUE

The role of the **external partners** in the critical dialogue process is:

- To share their experience and knowledge developed over the years whilst acknowledging the depth of experience held by the organisation.
- To act as citizens concerned with growing communities and a society rooted in common mutuality, fairness and pluralism.
- To be always willing to raise critical questions for the organisation, not become part of it.
- To move between different roles as citizens, professionals and members of the wider community.

---

<sup>1</sup> This vision has been adapted from Rao A., et al ,Gender at Work - Organisational Change for Equality, Kumarian Press, pp.xii-xiii.,1999.









## CONTENTS

HEADINGS	PAGE NO
DEFINITION OF A LEARNING ORGANISATION	10
<b>SECTION A UNDERSTANDING THE EDI FRAMEWORK</b>	<b>11</b>
1 PREAMBLE	12
2 BACKGROUND TO THE EDI FRAMEWORK	13
2.1 From the Periphery to the Mainstream	15
2.2 The Costs and Benefits of Organisational Learning	17
3 THE EDI FRAMEWORK	20
3.1 Principles of 'Equity, Diversity and Interdependence'	21
3.2 Concepts of Organisational Change	23
3.3 Introducing the EDI Framework	34
4 DISTINCTIVE CHARACTERISTICS OF THE EDI FRAMEWORK	38
<b>SECTION B USING THE EDI FRAMEWORK</b>	<b>40</b>
5 BUILDING BLOCKS OF THE EDI FRAMEWORK	42
5.1 Measures for Changing	43
5.2 Areas for Changing	44
5.3 Steps for Changing	46
6 STRUCTURING NEW DIALOGUE	50
7 CRITICAL QUESTIONS	56
8 AUDITING THE PROCESS	100
<b>DIAGRAMS</b>	<b>104</b>
<b>APPENDICES</b>	<b>105</b>
A ABOUT THE PARTNERS	106
B GLOSSARY OF ABBREVIATED TERMS	107
C UNICEF LADDER OF PARTICIPATION	108
D DEVELOPMENT GROUP MODEL	109





## Definition of a Learning Organisation

A learning organisation is:

“A group of people who are continually enhancing their capacity to create the results they want. If you think about this statement, it has two parts to it: one, you have to know what you want to create, so you’re continually reflecting on your sense of purpose and vision, and secondly, you have to be continually developing the capability to move in that direction.”

Peter Senge





# SECTION A

## Understanding the EDI Framework

- 1 PREAMBLE**
- 2 BACKGROUND TO THE EDI FRAMEWORK**
  - 2.1 From the Periphery to the Mainstream
  - 2.2 The Costs and Benefits of Organisational Learning
- 3 THE EDI FRAMEWORK**
  - 3.1 Principles of 'Equity, Diversity and Interdependence'
  - 3.2 Concepts of Organisational Learning and Change
  - 3.3 Introducing the EDI Framework
- 4 DISTINCTIVE CHARACTERISTICS OF THE EDI FRAMEWORK**





## 1 PREAMBLE

The genesis for the Equity, Diversity and Interdependence Framework (EDIF) emerged from the different practices and experiences of Counteract and Future Ways.

As an organisation committed to challenging sectarianism in the workplace, Counteract wished to acknowledge, in some manner, those organisations that were consistently challenging intimidation.

This early vision was driven by workplace experiences of resolving often dangerous and threatening disputes fuelled by:

- The failure to acknowledge difference and fairness in workplace relationships.
- An avoidance of the reality that an organisation is made up of people who are shaped by the fears and tensions present in wider society.

In 1991 Counteract and the 'Understanding Conflict' Project (University of Ulster), which evolved into the Future Ways Programme, began working together on seminars and training events to support Counteract's workplace initiatives. In 1997, Future Ways published a report entitled '**A Worthwhile Venture? Practically Investing in Equity, Diversity and Interdependence**' which reframed community relations work in terms of the three principles of Equity, Diversity and Interdependence. Pascal McCulla joined the project in 2000, on secondment from the Department of Finance and Personnel, to test this Framework with a number of different partner organisations.

In an increasingly divided society, it was obvious that unless workplaces found ways of dealing with these fears and divisions, the long-term future of both workplaces and the region was at risk. It is now clear that as one of the few places where people meet across lines of division, the workplace carries a potential for change absent in many other areas in society.

Whether they are 'For-Profit', Public or 'Not-for-Profit' organisations drawing on public resources or sentiment they carry a governance or citizenship role in contributing to building an inclusive society.

This framework emerges out of these understandings. It is underpinned by our conviction that a sustainable and prosperous society is underpinned by fairness (**Equity**), an acknowledgement of our differences (**Diversity**) and a relational understanding of the ways in which we live and work together (**Interdependence**).

The framework has been developed on the basis of an internal-external dialogue between an organisation and an external critical partner. The role of the external partner is to be the 'grit in the oyster', raising issues critical for the organisation. This role may also be played by an internal group of staff mandated by the formal leadership of the organisation.

The framework can be used by small groups, teams and organisations committed to nurturing 'good relations' whether through legislative demands such as Section 75 of the Northern Ireland Act (1998), internal developments or community changes. New initiatives often start off small with discrete groups of people. This framework is about supporting fragile experiments as well as wider organisational change programmes.





## 2 BACKGROUND TO THE EDI FRAMEWORK

For the last thirty two years, Northern Ireland has been grappling with a set of local social and economic conditions dominated by conflict and lack of trust. The economic and social costs have been significant. People have readily become reduced to single identities with an often limited capacity of forming meaningful relationships and networks beyond immediate family, local community and friends. The range of contexts and possibilities for learning has become diminished which has impacted on access to resources, employment, knowledge, information and, ultimately, society's capacity for innovation and exploitation of new opportunities.

The political agreement on 10 April 1998 represents the culmination of years of effort by individuals at a political, civic and business level.<sup>2</sup> Through the Belfast Agreement and the subsequent Programme for Government, the development of an equality culture and the building of trust are recognised as central strands in building a more stable and prosperous economy.

Our vision - as set out in the Agreement - is of a **peaceful, cohesive, inclusive, prosperous, stable and fair society**, firmly founded on the achievement of reconciliation, tolerance and mutual trust, and the protection and vindication of the human rights for all. (Programme for Government, Northern Ireland Executive, 2001)

Northern Ireland has, at least nominally, recognised that sustainable relationships are at the same time the basis and the goal of any democratic society. The challenge is that Northern Ireland is beginning on this journey with its core institutions having to openly embrace a breadth of identities and political aspirations previously unacknowledged or excluded.

Counteract and the Future Ways Programme (University of Ulster) are two non-governmental organisations in Northern Ireland. Coming from very different histories, we have worked in partnership to share and enhance our work in moving trust building from the periphery to the mainstream of organisational life.

Counteract developed from an adult education ethos within the trade union movement in Northern Ireland with a political analysis shaped by direct experience of the destruction caused by institutional and community sectarianism in Northern Ireland. This knowledge created a sense of urgency and distinctiveness to their work, initially in dealing with crises in the workplace to broadening out to wider community change processes.

The Future Ways Programme, based at the University of Ulster, grew out of practical reconciliation work from the early 1960s. This early work was shaped by the post-war ecumenical movement with the central themes of social justice and relationship building. More recent work has incorporated the themes of growing sustainable relationships and rural regeneration.

Over the years, Future Ways has developed a body of knowledge and practice through supporting groups develop new ways of meeting and learning together. It is only more recently that Future Ways has been attempting to translate these models of learning into an institutional and organisational context.

<sup>2</sup> See for example the G7 Group (now the G8 group) an umbrella group formed between seven business groupings and the trade union movement in 1996, coordinated by CBI (NI) and ICTU.





As a result of its history and knowledge base, Counteract seeks to quickly crystallise problems in order to rapidly move from a sectarian to an anti-sectarian environment supported by appropriate policies and programmes. Future Ways works from a different history and seeks 'ways out' by giving people the space to discover greater complexities about themselves and the often hidden difficulties within organisational structures and relationships. These represent two different, yet complementary, processes of learning and change.

Both groups share a common belief that the freedom to engage in new relationships can only exist in secure and inclusive institutions and structures. For this to happen, the task of building trust needs to be located at the centre of public policy and organisational life.



## 2.1 FROM THE PERIPHERY TO THE MAINSTREAM

Historically, the task of building trust has depended on the most vulnerable sections of society: community groups in economically deprived areas, young people, committed individuals and a few politicians. Huge areas of society including the business sector, the public sector and large voluntary agencies were not making any real contribution to peace-building; burying their heads in the sand and hoping it would all just go away<sup>3</sup>. In part this was due to:

1. **The deep insecurity about the outcome of talking about division in a divided society where relationships are so fragile.** There continues to be a tendency for those in leadership positions in business, politics and the churches to focus on commonalities rather than differences. It is a natural response in the midst of chaos and uncertainty to focus on what we hold in common; however, silence cannot transform divisions and differences.
2. **The cultural common sense that supports separation, avoidance and politeness.** In a society where separation, avoidance and politeness are the norms, the space for real meetings between people where there is respect and mutual regard is always narrowed and hostage to wider communal fears. Cultural common sense becomes one of learning to be polite while avoiding reference to issues such as religion and politics in the presence of the 'other'. Cultural common sense teaches that separation is safer.

Within this context, a void grows between people from different histories. In a context of suspicion, lack of knowledge breeds speculation and speculation breeds fear. These fears merely reinforce separate identity, stereotypes and the demonising of the 'other'.

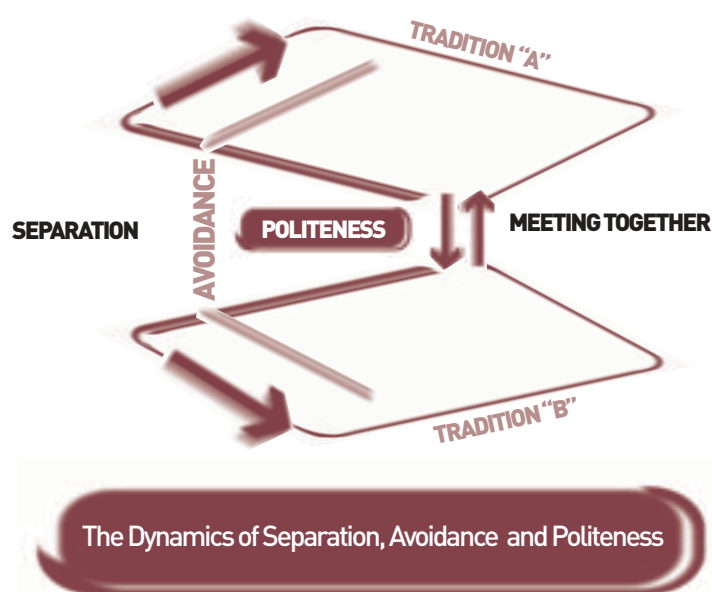


DIAGRAM 1

<sup>3</sup> Eyben, K., Morrow, D. J., Wilson, D.A., A Worthwhile Venture? Practically Investing in Equity, Diversity and Interdependence in Northern Ireland, University of Ulster, Coleraine, 1997.





3. **The consequence of a highly fragmented society which allows questions of relations with the 'other' community to be treated as peripheral to what are considered to be more central concerns.** As a result separation becomes the norm. This is evidenced, for example, by the training and education opportunities in most professional courses failing to focus on the issue of 'working and delivering services in a politically contested society'<sup>4</sup>.
4. **An understanding of community relations policy based on 'centre-periphery' thinking.** Violence on the margins of society is presumed to be rooted in problems in those areas alone, while areas and organisations at the core of Northern Ireland's society and economy are deemed to be healthy on the basis of a lack of visible violence. By presuming that violence is a problem of relationships in the areas where it actually happens, the policy response becomes overwhelmingly event-driven rather than institutionally focused.
5. **The absence of any practical models of change or incentives makes any change from the norm a unique experiment.** This in turn reinforces people's fears of undertaking a journey which no one else seems to have undertaken.
6. **The distinct experiences, histories and relationships associated with living in this society, whether as a school child, a public official, a business person or community worker.** Recognising the feelings and emotions generated by the histories is part of moving towards a more pluralist society. Often there are very deep resistances to any processes that evoke or touch on these very personal emotions.
7. **Most peace-building efforts at an institutional or organisational level being primarily focused on either meeting legislative demands or responding to crises.** As a holding position, it seems safer and easier to avoid dealing with the effects of the divisions on relationships. This silence allows Northern Ireland and its institutions to function in ways that often looks normal, covering up the deep fears and tensions that were managed rather than transformed. Intimidation has been, and for many still is, the mark of this society. Intimidation is most effective when it is invisible because the damage and injustices it creates remain unspoken and hence unresolved.

**It is only recently, with the developing political process, that people have felt more secure in seeing trust building as a core part of daily working practice. This Framework has been developed in partnership with groups and organisations who have seized this new opportunity.**

---

<sup>4</sup> Op.cit. pp27 - 57.



## 2.2 THE COSTS AND BENEFITS OF ORGANISATIONAL LEARNING

Two key questions most organisations ask us:

**What are the costs and benefits in engaging in this process?**

**How will it help us achieve our objectives?**

The costs of engaging in such a process revolve primarily around releasing staff time and giving priority to training, learning and reflection.

The costs of **not engaging** in this process are however much more significant; there are considerable costs, both hidden and overt, associated with an organisational and societal culture based on silence, avoidance and intimidation.

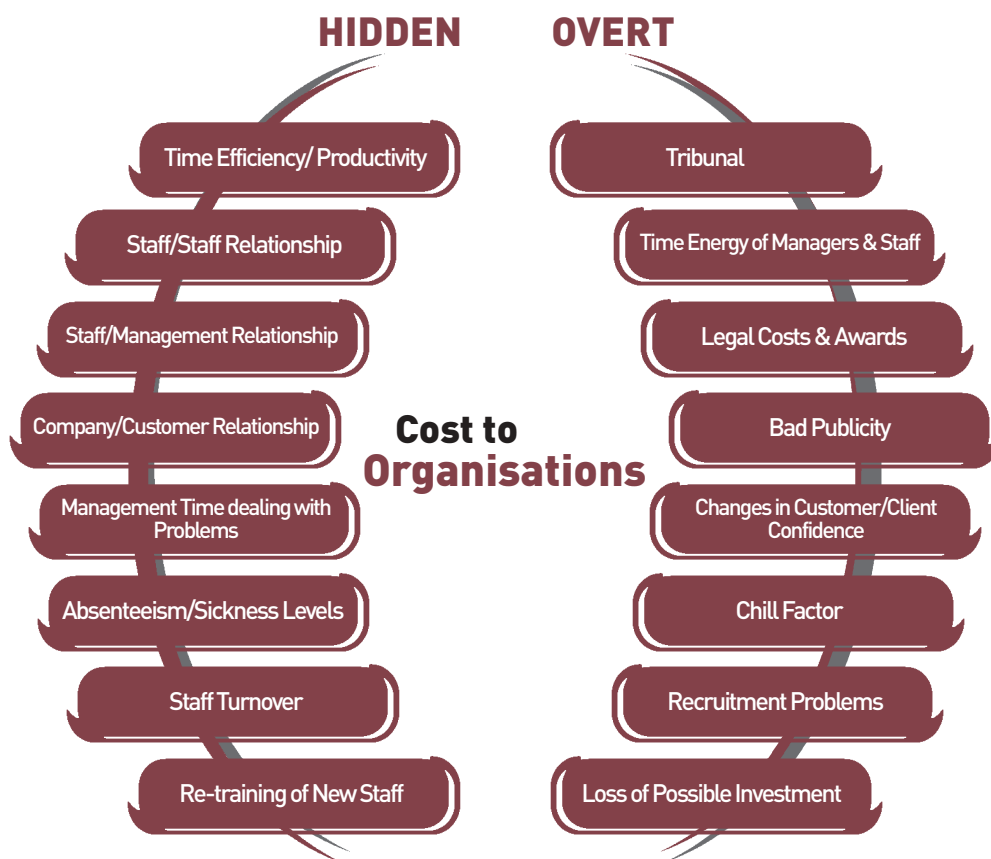


DIAGRAM 2  
COST TO ORGANISATIONS

The Different Levels of Cost to an Organisation when not dealing with flawed relationships and mistrust.



Flawed relationships and mistrust affect the development of an organisation and a region. However, many of these costs have been silently factored in over the last thirty years. Many organisations have never had to acknowledge or face up to the consequences of separation. This has, in part, contributed to separate educational systems, empty housing stock, duplication of social service provision and separate leisure and community centres. People's energies and time has been taken up in avoiding talking about the issues that are most important to them and to this region.

### Dilemmas of Measurement

Value judgments will always underpin calculations about what is worth costing and what is not. In other words, there is a 'chicken and egg' situation. On the one hand, organisations have to be committed to the importance of sustainable relationships before making a 'cost-benefit' calculation; on the other hand, many organisations need those calculations before they can make that leap.

Another important factor as to whether organisations take account of 'relationships' is time. The British Government's Performance and Innovation Unit has identified that a key leadership quality is the capacity to treat the short term as if it were the long term.<sup>5</sup> Organisations that are interested only in the short term will fail to see the relevance of investing in 'good relations'.

An organisation that is committed to sustainable social relationships will move beyond the confines of narrow economics and financial calculations to also considering the social implications of their actions. This then determines the ways in which it calculates the costs of engaging in this process and benefits for different constituencies.

For example, Jean Horstman, the former Chief Executive for the Society for Organisational Learning (SOL), argues that addressing issues of equity, diversity and interdependence will pay in different ways for different people.

A school that:

- develops a relational understanding of its place and purpose in the community **(Interdependence)**
- values the diversity of its local communities and understands itself to be bound up with the future of its children **(Diversity)**
- actively includes those from marginalised backgrounds **(Equity)**

knows that a 'cost-benefit' analysis must include not only a financial aspect but also a social sustainability dimension and that this must be calculated over a period spanning childhood to adulthood rather than the much narrower time-frame of the electoral cycle.

<sup>5</sup> Strengthening Leadership in the Public Sector - A Research Study by the PIU, Performance Improvement Unit, 2000. [www.cabinet-office.gov.uk/innovation/projects/projects.shtml](http://www.cabinet-office.gov.uk/innovation/projects/projects.shtml)



“ If it costs \$6000 per year to educate a child and \$24,000 per year to keep someone in prison, there are immense benefits for the state and its citizens to invest in education but these will not be immediately apparent - there is a time gap between the effort and results. For the local politician intent on winning the next election there are probably few benefits in this approach. The short-termism of the electoral cycle mitigates against substantial investment in public services. For the young person there are immediate benefits, centred around personal growth, confidence and learning.”<sup>6</sup>

In conclusion, an organisation intending to spend time and resources in moving towards the vision outlined at the beginning of the document must be clear about the costs involved. It must also be clear regarding the costs of not engaging in this process. This requires beginning to place more value on interdependence and good relations than separation and silence.

---

<sup>6</sup> Quoted in seminar with Chief Executives Forum, Belfast, 13 June 2001.

### 3 THE E.D.I. FRAMEWORK

The EDI Framework is the coming together of two fields of practice:

1. Experiences of learning and change in the ‘community relations field’ in Northern Ireland.
2. Insights and models from those at the forefront of ‘organisational learning and change’ in North America and Europe.

Without the principles of **Equity, Diversity and Interdependence**, for us, organisational change processes can develop without reference to a political and community context and a vision of sustainable relationships. <sup>7</sup>

Without the **concepts of organisational learning and change**, we lack the tools and techniques to understand how organisations function.

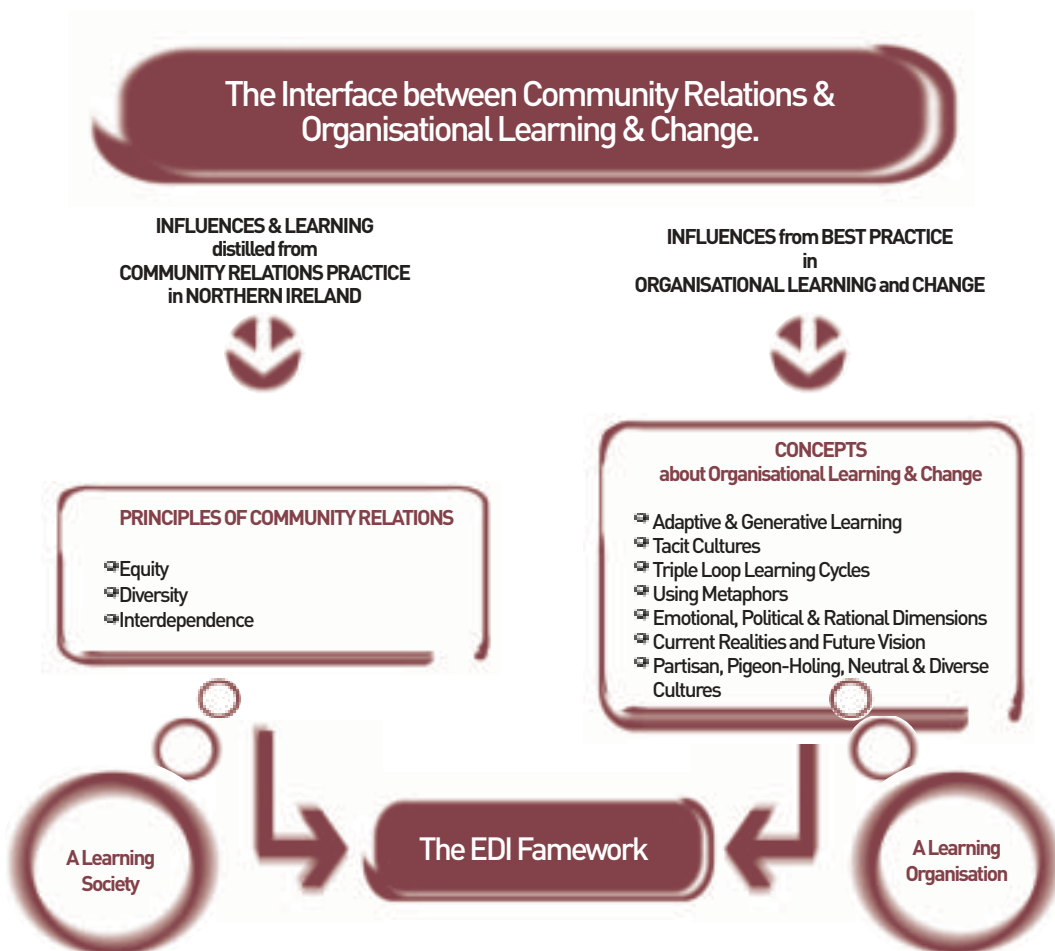


DIAGRAM 3  
THE EDI FRAMEWORK

<sup>7</sup> Also see The Parekh Report, **The Future of Multi-Ethnic Britain**, The Runnymede Trust, 2000. This report identified three central concepts: equality, diversity and cohesion as concepts that need ‘to be consistently and constantly central in government policy and decision making’. P.106.



### 3.1 THE PRINCIPLES OF EQUITY, DIVERSITY AND INTERDEPENDENCE

#### A Learning Society

The principles of 'Equity, Diversity and Interdependence' are not new; they underpin our idea of a just and inclusive society.

- **Equity** is about ensuring that all sections of society have equal opportunities to participate in economic, political and social life through redressing inequalities arising independently from people's choices.
- **Diversity** is about acknowledging how our differences as individual human beings and as members of groups can improve the quality of our lives.
- **Interdependence** is about recognising that we are shaped by our relationships, and that our potential as human beings and as a society is dependent on the quality of our relationships with one another.

The search for equity or fairness is the underpinning of any democratic society. At the same time, we are different and the recognition and valuing of our differences as individuals and as members of different ethnic, political or religious groups is the mark of a civil society. However, equity approaches are likely to fail, and the affirmation of diversity is likely to ghettoise, unless our interdependence with one another is recognised. We are shaped by our relationships and our potential as human beings and as a society is dependent on the breadth and depth of these relationships and networks. It is through the question of interdependence or the quality of our relationships and interactions that the issues of fairness and difference become meaningful.

Although not new, these three principles have often been pursued separately rather than as part of a coherent strategy. This results in different agencies, pieces of legislation and funding bodies dealing with these individual strands often without connection.

For example, job skills training for the unemployed (**equity**) seldom acknowledges the central importance of developing relationships (**interdependence**) in the workplace with different identity groups (**diversity**). Cultural projects (**diversity**) might avoid looking at the conflictual nature of relationships (**interdependence**) which underpin various cultural traditions. Mutual understanding programmes (**interdependence**) might not explore the institutional or structural nature of discrimination and exploitation in this society (**equity**).

The hardest principle to understand and implement is that of **interdependence**. We cannot see relationships until they break down, but we can see poverty or wealth (**equity**) or those who are different from us (**diversity**). More important than the lack of visibility is that interdependence asks us to self-reflect and consider **how** we are with others. Interdependence is about focusing on us as well as others; it acknowledges that to implement equity and diversity measures requires changing the way we behave with others. Organisations accepting this principle must negotiate equity and diversity measures within a framework of improving the quality of relationships and levels of trust. For many groups and organisations, this means finding ways of reconnecting themselves back to a community after years of functioning apart from the wider chaos and fears.





In our work we have found that each of us will start from a specific principle depending on our own history and experience.

For example, **on the question of gender**, some people start from the issue of equity and discrimination, others might start from the issue of diversity and the space to be different as a woman or man, others might start from interdependence or the daily negotiations between men and women in the home and workplace.

**Disability** may be an equity theme yet it has deep strands of diversity within it as well as the search for an acknowledgement of human interdependence.

The challenge for us is whatever the starting point, Equity, Diversity or Interdependence, how do we find the other two principles?

### Exploring these Principles

The exploration of the ideas surrounding **Equity, Diversity and Interdependence** has to be very practical and in language that is meaningful. They are not top-down technical terms that require to be rolled out across an organisation. To use them means legitimising the space within an organisation for different stakeholders to return to core values and principles within the context of a changing political, social and community context.

For example:

- The purpose of a local Council is to ensure that all those who live and work within the council area have their place in relation to others. (A starting point is **Interdependence**)
- The purpose of a voluntary agency might be to stand with the marginalised. (A starting point is **Equity**)
- The purpose of the police is to protect and serve different needs within the whole community. (A starting point is **Diversity**)

Most public and voluntary agencies are rooted in the principles of 'Equity, Diversity and Interdependence' and yet often fail to articulate them.

Their challenge is how these principles inform the ways in which decisions are made and their business promoted. This requires organisations to grow a reflective learning culture.





## 3.2 CONCEPTS OF ORGANISATIONAL CHANGE

### A Learning Organisation

"There seems to be a universal human tendency to design one's actions consistently according to four basic values:

1. To remain in unilateral control.
2. To maximise 'winning' and minimise 'losing'.
3. To suppress negative feelings.
4. To be as 'rational' as possible - by which people mean defining clear objectives and evaluating their behaviour in terms of whether or not they have achieved them.

The purpose of all these values is to avoid embarrassment or threat, feeling vulnerable or incompetent." <sup>8</sup>

The outcome of 'avoiding embarrassment, threat, feeling vulnerable or incompetent' is to avoid learning.

How we learn is shaped by our different cultures and experiences and the relationships within which we live and work. Some of us learn best through individual study and exploration, others through testing things out in groups, whilst others learn through intensely physical and visual experiences. Many organisations have reacted against this diversity by, often unconsciously, recruiting personnel who think and frame problems in similar ways. In the short term this might reduce the potential for conflict and disagreement but in the long term this severely limits an organisation's capacity to grow and respond to wider environmental changes and the diversity of communities it is wishing to reach or affect.

Peter Senge describes the Western industrial model as 'assembly line' learning where, from an early age, we are placed on a production line and fed information. Our capacity to absorb the information and move at the pace of the assembly line determines our value and success. We learn to make sense of the world not through connections and relationships but through fragmenting life into distinct compartments in order to more effectively control it.

"We learned how to please the teacher, as we would later try to please our boss. We learned how to avoid wrong answers and raise our hand when we knew the right answer, a habit that would later shape the ongoing organisational dance of avoiding blame and seeking credit for successes. We learned how to be quiet when we felt lost, which is why no one questions the boss in the official meeting even when he or she makes no sense." <sup>9</sup>

One of the greatest losses for organisations is when people lower down the hierarchy learn to 'say the right things' to those above them.

Research carried out by Chris Argyris confirmed that 'smart people' do not learn in many organisations because they have so much invested in proving what they do know and avoiding situations where they don't know. <sup>10</sup>

<sup>8</sup> Senge, P., et al, *Schools that Learn*, Nicholas Brealey Publishing, 2000, p.412.

<sup>9</sup> *Op. cit.*, p.34

<sup>10</sup> Argyris, C., *On Organisational Learning*, Blackwell, 1999







Our instinct is to control events through understanding learning to be about 'capturing, storing and retrieving' information when appropriate. To quote from Senge:

"Reality is an explanatory principle when we are tired of reflection and not wishing to enquire any further." <sup>11</sup>

In the midst of societal and community chaos and uncertainty, the instinct to stay with 'what is known' and the familiar becomes a basic survival mechanism. Many mainstream organisations in Northern Ireland have 'survived' over the last thirty years by establishing systems and structures that go round the communal divisions. Within the workplace people have met through silence rather than words, avoiding the central fault line that has been tearing this society apart. This is a logical adaptive response in the midst of the chaos outside: it is about controlling the chaos rather than generating different possibilities or new ways of viewing the world. Silence sometimes may appear to protect the vulnerable at the point of vulnerability but it may ensure that nothing changes at the core of this society.

This region is only slowly, painfully and with great difficulty emerging from conflict. However, the relative absence of violence does not equal peace; social relations remain shaped by years of hostility and fear. These have embedded separatist and competitive norms, expectations and beliefs that permeate and shape social structures and inter-group relations at all levels including:

- family and friendships;
- neighbourhoods and public spaces;
- school and youth experiences;
- faith and culture;
- sports and recreation;
- the workplace;
- government, politics and the law.

People in a conflict often become reduced to single identities with an often limited capacity of forming meaningful relationships and networks beyond immediate family, local community and friends. The range of contexts and possibilities for learning become diminished. This impacts on access to resources, employment, knowledge and information and, ultimately, on the ability of this society to generate new wealth and opportunity.

We believe that the bedrock of effective learning relationships is trust. In a society where common sense teaches you to trust 'only your own', caution rather than entrepreneurship shapes development opportunities.

---

<sup>11</sup> Peter Senge at a Society for Organizational Learning seminar, Babson College, December 2000.



The EDI Framework draws from a number of core concepts. Some have been adapted from the field of systems thinking and organisational learning, in particular from the work of Peter Senge and the Society for Organisational Learning.<sup>12</sup> Others are drawn from our own work and experiences.

## Core Concept 1

### ADAPTIVE AND GENERATIVE LEARNING

Adaptive learning is about coping with environmental change, ensuring basic survival through 'fitting' in.

Generative learning is about actively creating new environments, generating new options and opportunities for growth.<sup>13</sup>

Northern Ireland has a deeply ingrained culture of adapting to events rather than facing and transforming them. However, if we are to radically change the way in which life is organised in Northern Ireland, we have to generate new ways of working, organising and meeting. Change processes must kick-start learning cultures based on experimentation and reflection (generative learning) .

The current transition period is clearly highlighting the shift from adaptive learning to generative learning for organisations. Many organisations now realise that the conflict protected them from the realities of a changing and dynamic world. Coming to terms with this new understanding requires relationships that are open and trusting, not closed and silent. It means increasing the space for 'takeable' risks.

<sup>12</sup> K. Eyben, D. Morrow & D. Wilson are research members of the Society for Organizational Learning.

<sup>13</sup> Senge, P., *The Leader's New Work: Building Learning Organisations*, Sloan Management Review, Fall 1990, Vol. 32, No.1. p.8.

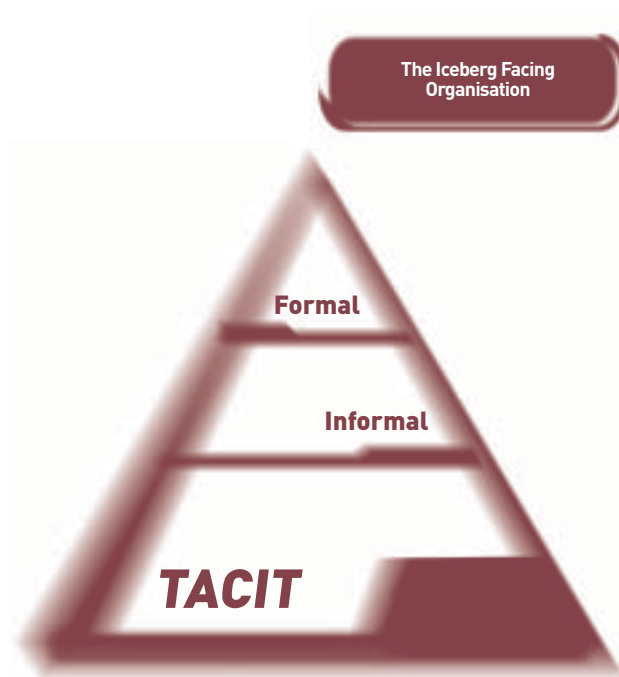


## Core Concept 2

### TACIT CULTURE

Many organisations have a formal culture of rules and procedures, an informal culture of how to really behave and work, and a tacit, or hidden, culture, that only becomes visible when individuals run against it or transgress it. The quiet reminder, the 'tut-tut' or the 'we never do things like that' are visible elements of this tacit culture.<sup>14</sup>

DIAGRAM 4



Organisations engaging with the interlinked but often contradictory principles of fairness, difference and mutuality are about seeking the alignment between the:

- **Formal** culture shaped by equal opportunities policies and processes and daily activities and events.
- **Informal** culture in terms of how things really work and the resulting patterns and relationships.
- **Tacit** culture formed by underlying structures, habits and what we take for granted about the relationships within which we live and work.

Organisations that wish to increase their openness to one another and to the community they serve need to unpack those elements of their tacit culture that frustrate or get in the way of this **mission** or **vision**. For example, people's deep prejudices in terms of age, class, sex, colour, politics or religion should not hold back an organisation's wish to regenerate and build communities or serve the wide diversity of citizens in society.

<sup>14</sup> From a workshop, in Belfast, with Dave Brubaker, Co-operative by Design, Phoenix, March 2000.



### Core Concept 3

#### 'TRIPLE' LOOP LEARNING<sup>15</sup>

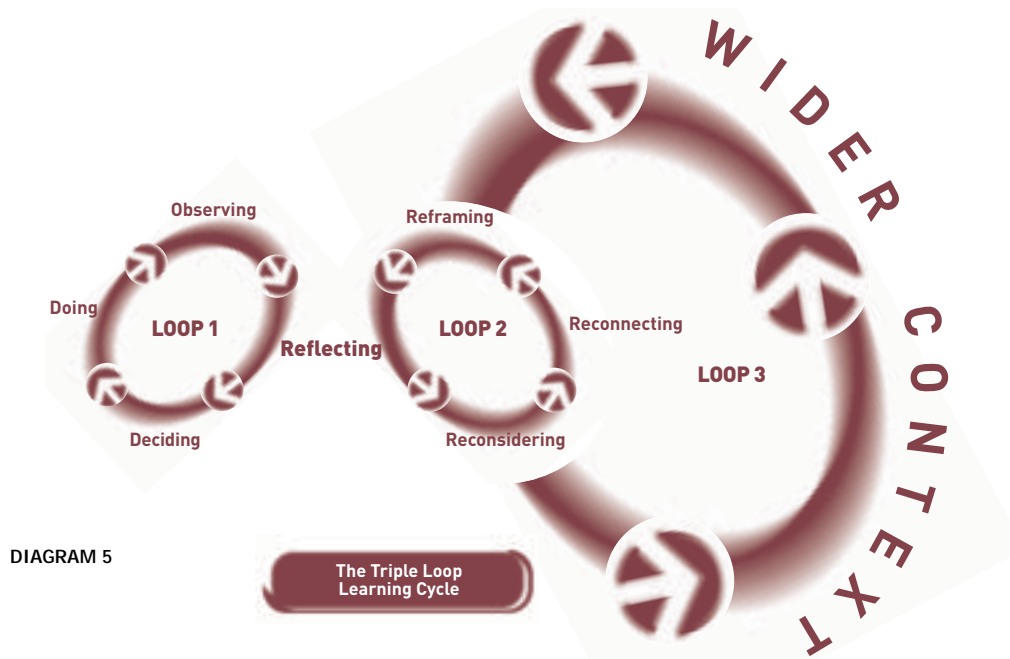


DIAGRAM 5

Chris Argyris coined the term 'double-loop learning' which best describes the first two loops the EDI Framework is based upon.<sup>16</sup>

**Loop 1** comprises of a simple feedback loop typified, as Gareth Morgan suggests, in the household thermostat.<sup>17</sup> A thermostat controls the temperature of a room through responding to changes in the outside temperature in relation to the pre-set temperature. However, the thermostat cannot question the pre-set temperature itself.

**Loop 2** requires questioning that pre-set temperature.

In other words 'double-loop learning' is a process of reflection about:

- Questioning and **reconsidering** the norms and values that underpin the initial decision.
- Exploring new connections and relationships through **reconnecting** to the wider organisational context beyond the normal sphere of influence.
- Creating a new framework and set of assumptions regarding the organisation's purpose and direction through **reframing** current realities.

Within our conflict many public and voluntary organisations have chosen to carry on by distancing themselves from the wider context and emphasising their technical and managerial professionalism.<sup>18</sup> This can mean that Loop 2 activity can be narrowed in scope. While perhaps understandable in a conflict, in the new dispensation that exists, these organisations need to turn into the wider community context and re-engage.

<sup>15</sup> Adapted from Senge, P., *Schools That Learn*, p.96

<sup>16</sup> Adapted from Argyris, C., *On Organisational Learning*, p.68

<sup>17</sup> Morgan, G., *Images of Organisation*, pp.86-88

<sup>18</sup> CCETSW, *Getting Off the Fence, Challenging Sectarianism in the Personal Social Services*, Belfast: CCETSW (NI) (see page 26 - 29 on Professionalism), 1998.



This 'self-questioning' ability is rare in many groups and organisations caught up in daily tasks and crises. This is particularly true within the community and voluntary sectors trying to survive in an uncertain funding environment and a public service still shaped by a technical, managerial culture.

### Loop 3

The third loop is about orientating ourselves to the wider societal and communal realities that are ever present yet often forgotten or avoided in a conflict.

Loop 3 asks us to step back and **reflect** on these realities and **reconsider** how these have shaped patterns of behaviour that influence our organisations. For example: patterns of silence, avoidance, denial or confrontation.

Loop 3 invites us to then **reconnect** with a wider vision of transforming and **reframing** the ways in which people meet and work together and generate new commitments, energy and talent to that process.

## Core Concept 4

### USING METAPHORS

Metaphors are seen as central in connecting the conscious to the unconscious, creating or surfacing images that often remain below the surface. Robert J. Marshak suggests that metaphors used in organisational change processes can often surface assumptions about how people understand change.<sup>19</sup>

For example, Marshak identifies the phrase 'if it ain't broke don't fix it', as one of the most common reactions to change. He argues that this phrase surfaces as an understanding of organisations as machines:

"This is not a trivial association when we consider the implications of the extended metaphor of an organisation as a machine. If it is a machine, then things should be smooth-running, well-oiled, predictable, efficient, and designed such that all the parts fit together to fulfil a single, unambitious function or purpose."<sup>20</sup>

It follows that by comparing an organisation with a machine, those who work within an organisation are 'machine operators and engineers' whose task is to keep the engines running smoothly. Change is associated with something going wrong or 'things breaking down' with utmost speed required identifying and then repairing the broken part. Other common phrases associated with this metaphor of change include 'driving change through' or 'rolling the process out' - both evoking images of assembly line manufacturing. As Peter Senge points out 'imagine talking about driving change through your family!' Using this metaphor helps us understand why change processes can carry such negative connotations for people - it implies that something is wrong.

Jean Horstman describes an experience of helping a small organisation working through a fundamental rethink of structures. Using the metaphor of a road, she

<sup>19</sup> Marshak, R., *Managing the Metaphors of Change, Reflections - The SOL Journal*, Vol. 2, No. 3, pp. 6-15

<sup>20</sup> *Op. cit.*, p.7



describes the change as moving from a group of people walking along that road to that same group of people getting into a car and driving.

“The organisation is still travelling along the same road but at a faster more effective pace. The use of a metaphor helped the organisation think through what was happening and why whilst at the same time feeling reassured that the fundamental mission remained unchanged.”<sup>21</sup>

Marshak identifies three additional metaphors of change, which characterise many change processes. He argues that frequent causes of conflict and resistance during change processes are due to people using different metaphors of change.<sup>22</sup>

Metaphor	Diagnosis	Action
1) Fix and Maintain 'If it ain't broke, don't fix it'	The machine has broken down and we need help to find the fault.	To find the fault as fast as possible to start up production again.
2) Build and Develop	The basic foundations are sound but further growth and development is required.	Performance needs to be upped, targets increased to increase effectiveness.
3) Move and Relocate 'Transitional'	Need to move on from the past to a new and better vision in line with wider changes.	To develop a clear plan that will guide us step by step towards our new goals.
4) Liberate and Recreate 'Transformational'	Need to completely rethink the purpose, value base and structures	To rethink vision, surface assumptions and generate a new purpose for the organisation.

**Applying this to Northern Ireland**

- How can open relationships be built within workplaces that acknowledge rather than ignore the potential our differences can bring to work and wider organisational tasks?
- How can transformed workplaces impact on the external environment and wider community relationships in a society struggling to build a more inclusive future?

It is not a matter of 'fixing' a broken part, developing from secure foundations or beginning a journey where the destination is clear. Instead, we need to completely rethink the role and purpose of our organisations in this new situation. The destination is unclear because it is a place that Northern Ireland has never been. Because we do not know the answers, we have to generate them.

**The EDI Framework is based on the fourth metaphor, 'liberate and recreate'.**

<sup>21</sup> As quoted by Jean Horstman at the NICS, Permanent Secretaries' Diversity Working Group Workshop, June 2001, Belfast.

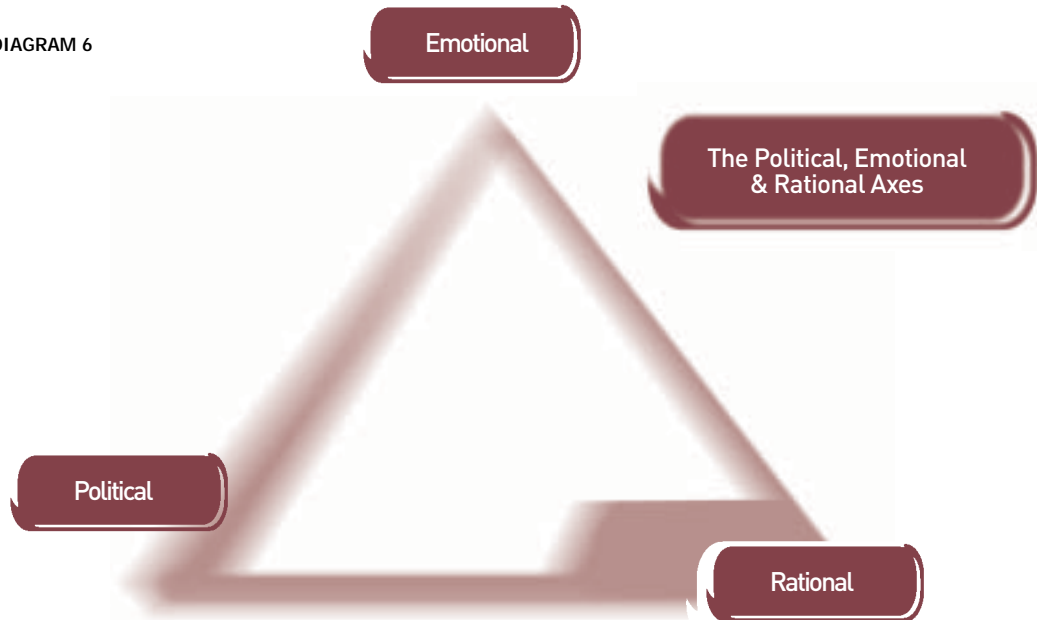
<sup>22</sup> Table adapted from Marshak J.R., Managing the Metaphors of Change, Reflections, The SOL Journal, Vol. 2, No. 3, P.11.



## Core Concept 5

### POLITICAL, EMOTIONAL AND RATIONAL DIMENSIONS OF CHANGING

DIAGRAM 6



To meet others from a different tradition or culture is often a journey of emotion, rationality and politics.

- **Emotionally** it is about acknowledging our histories, fears and stories we have been told about the 'other'.
- **Rationally**, we recognise that excluding groups of people in terms of, for example, identity, religion, social background, gender is not a sustainable option.
- **Politically**, it requires us to renegotiate power relationships.

In Northern Ireland, many in the broad Unionist/Protestant family feel that they are going through a painful, grieving process in which the past is no longer possible yet the future seems so uncertain. In contrast, the broad Nationalist/Catholic family are going through a painful gain - the future will always be better than the past, but this has not been without loss. In our experience of community relations work people within the different traditions have very little understanding of what the others are experiencing.

Many quality standards and frameworks are based on reason and common sense regarding how an effective organisation should be managed. However, engaging with issues of difference, prejudice and fear is not about what is 'reasonable' but how we feel about our place in relation to 'others'.

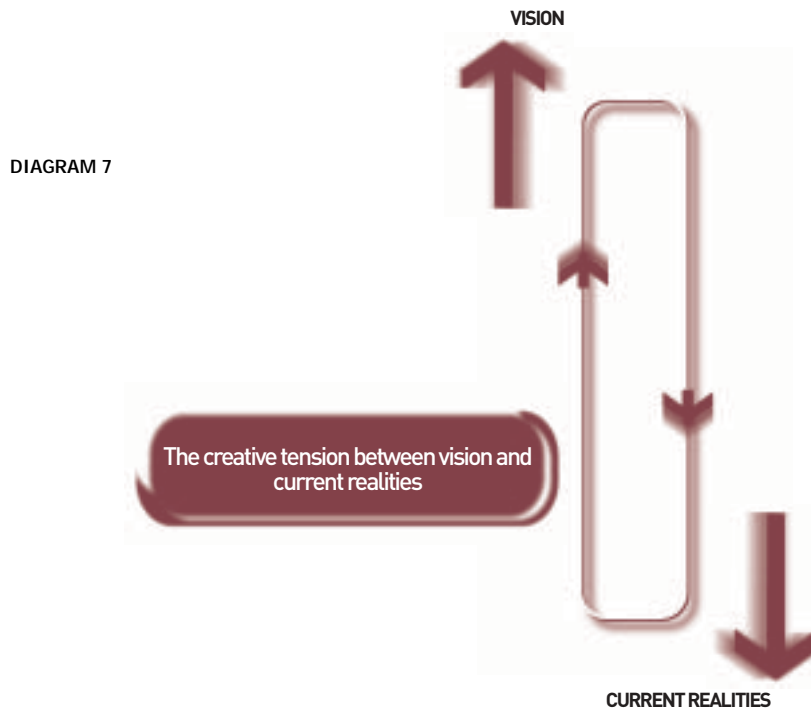
In our experience managers find it easier to remain on the political/power and rational axes. The challenge for many organisations now is how to manage the three axes of 'political', 'emotional' and 'rational', in a way that does not evoke apprehension and fear but grows a relational culture across the organisation.



## Core Concept 6

### CURRENT REALITY - VISION

The sixth concept underpinning the Framework is the critical tension between 'realities' and 'visions'.



The significance of the critical tension between a deep understanding of current realities and a vision for the future is core to the process of change and learning. Peter Senge quotes Martin Luther King Jr:

“Just as Socrates felt it was necessary to create a tension in the mind, so that individuals could rise from the bondage of myths and half truths.... so must we....create the kind of tension in society that will help men rise from the dark depths of prejudice and racism.”<sup>23</sup>

Without holding a picture of what could be, there is limited energy for changing current realities. On the other hand, a vision becomes reduced to a cynical exercise or ‘motherhood and apple pie’ unless there is a deep and shared understanding of the ‘current reality’. This goes beyond a knowledge of activities and programmes. It requires feeling safe to talk about deeply held assumptions and feelings and challenging deeply held beliefs about religion and political identities. It requires developing cultures of learning where people begin to create new possibilities for one another through an increased awareness of the strengths and possibilities inherent in our current realities.

The EDI Framework is about maintaining a tension between the vision for organisational life in Northern Ireland and the present capacity we have as a community to learn about difference. Change is measured with regards to how far we have moved towards that vision.

<sup>23</sup> M.L. King Jr., Letter from Birmingham Jail, American Versions, pp.52-59 quoted in Senge, P., The Leader’s New Work: Building Learning Organisations, References cited, P.9, January-February 1986.



## Core Concept 7

### PARTISAN, NEUTRAL, PIGEON-HOLING AND DIVERSE CULTURES

We have identified four distinct cultures<sup>24</sup> that characterise the levels of trust and openness that can shape work teams, departments and organisations.

#### Partisan Culture

A partisan workplace culture is one where the main stakeholders (employees, staff suppliers, management, clients) belong predominantly to one identity group. Individuals who do not belong to that identity group either submerge their differences and 'fit in', or leave. Following the implementation of Direct Rule and fair employment legislation, the number of partisan workplaces has diminished, becoming neutral places of work.



DIAGRAM 8



#### Neutral Culture

A culture of neutrality promotes fair employment practices. There are rigorous monitoring procedures and if the numbers do not reflect wider communal breakdowns then action is taken - with varying degrees of enthusiasm. Success is gauged in terms of numbers only rather than the state of relationships. Difference is sacrificed for the sake of harmony. A neutral ethos was often the only possible state during times of insecurity with individuals expending energy in avoiding the acknowledgment of difference and therefore potential conflict. Ultimately, neutrality offered both identity groups an opportunity to belong in a mutual relationship based on silence and politeness.

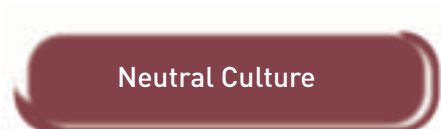
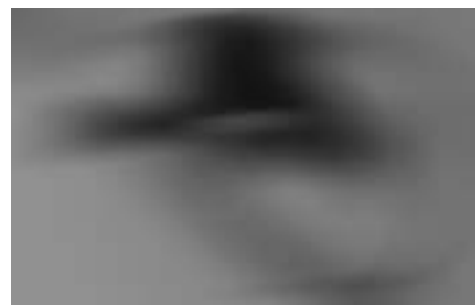


DIAGRAM 9



<sup>24</sup> See Page 14 - 15, Eyben, K., Morrow, D.J., Wilson, D.A., A Worthwhile Venture? Practically Investing in Equity, Diversity and Interdependence in Northern Ireland, University of Ulster, Coleraine, 1997.



**'Pigeon-Holing' Culture**

Pigeon-holing takes place when difference is acknowledged but is carefully secured on the periphery of work practices. In the pigeon-holing culture there is never any likelihood that valuing and building on diversity will impact on mainstream work-place relationships and practice.

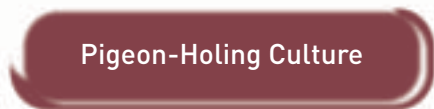


DIAGRAM 10



**Diverse Culture**

A diverse ethos has been impossible in many workplaces over the last thirty years. The risks were too great. There is now an opportunity, for both pragmatic and ethical reasons, for some workplaces to move to a more diverse culture where differences are not only acknowledged but valued at the highest level. This requires people meeting as equals with their identity differences and, in so doing acknowledging that we are more than just Unionist, Loyalist, Protestant, Catholic, Nationalist or Republican.

Memories and history remind us that diversity has been used to promote injustice and partisanship and we have developed elaborate mechanisms over the last thirty years to avoid these contentious issues and maintain a modicum of politeness. And yet the divisions remain.

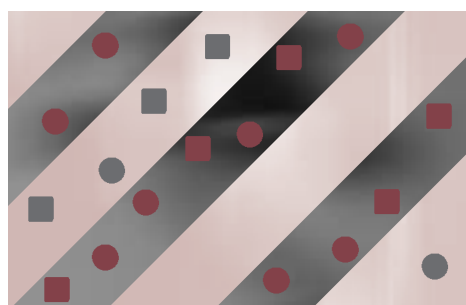
The EDI Framework seeks leaders in organisations that support a change of culture within a work space and a willingness to model new forms of meeting for the wider community with diversity highlighted as an asset instead of a weakness or disadvantage.

Public organisations have to be impartial at the point of delivery / service yet diverse in their membership and knowledge.

Voluntary organisations may historically belong to and serve quite partisan histories or areas. In the future, as civil society organisations and as organisations in receipt of charitable and public funding, they will have to challenge discriminatory attitudes and behaviours that do not acknowledge difference or work for an interdependent society.



DIAGRAM 11





### 3.3 INTRODUCING THE EDI FRAMEWORK

'In the absence of inspired leadership or dogged individualism, the law becomes the only spur to action.'

#### **Moving Beyond Legislation**

Over the last ten years, legislation, particularly fair employment legislation, has regulated relationships within the workplace. From 1999, this legislation was extended to cover discrimination in goods, facilities and services and a range of other areas. Section 75 of the Northern Ireland Act (1998) required the public sector to focus greater attention to the area of service delivery. This statutory duty also requires public authorities to have regard to the desirability of promoting good relations.

Legislation can be and has been an enormous force for change towards ensuring basic minimum standards. However, basic standards by their very nature cannot produce the best results. A community or organisation that goes beyond compliance and builds transparency, openness and mutual respect across all its relationships becomes more effective. Barriers to inclusion are also barriers to achieving corporate and community goals.

Used as the **only** catalyst for change, legislation can inhibit the development of trust and openness. Legislation used as the only means of regulating relationships can increase levels of possible offence and grievance to a point where relationships are reduced to sterile interactions and where all signs of difference are potential legal time-bombs.

The Equity, Diversity and Interdependence (EDI) Framework is a framework designed to support organisations in Northern Ireland address the challenges of mainstreaming the principles of fairness, diversity and interdependence. It moves beyond the existing standards of silence and avoidance to recognise that to be different is to be human and that exploring our differences with one another enhances our productivity as individuals, as organisations and ultimately as a society.

#### **Moving Beyond Sectarianism**

The Framework's immediate focus is on the tensions, conflict and fears generated by the political / religious divisions and how these are reflected and shaped through poor organisational practices.

However, the Framework provides a model for locating the dynamics of sectarianism within a wider framework of exclusion and prejudice: gender, race, sexuality, physical abilities, age, ethnicity, education as well as the differences of hierarchy, grade or position inherent in the processes of organisational life.

The Framework's rationale is based on the understanding that the fears that characterise relations within and between the main 'identity' groups and the state form the main backdrop to public and private life in Northern Ireland. The long-term objective is to support organisations move beyond the narrow dynamics of sectarianism to address the wider paradigm of fairness and difference inherent in their stakeholder relationships.



When people feel uneasy and insecure they usually look for someone or somewhere to place their unease. In this move to scapegoating 'others' it is much easier to scapegoat a different person or a minority group<sup>25</sup>.

Sectarianism and racism are merely twins in a much larger family of discriminatory actions. At their base are feelings of dis-ease in the presence of difference.

The dynamics of ethnic frontiers<sup>26</sup> have parallels in large urban areas of modern cosmopolitan cities. Northern Ireland is not a unique place because these dynamics are worldwide. However, it is a place where the constraints around polite behaviour in the face of difference have been stripped away and we have found few safeguards to protect us from death and destruction. We have no other path but to be open to the one of building new relationships between peoples and traditions.

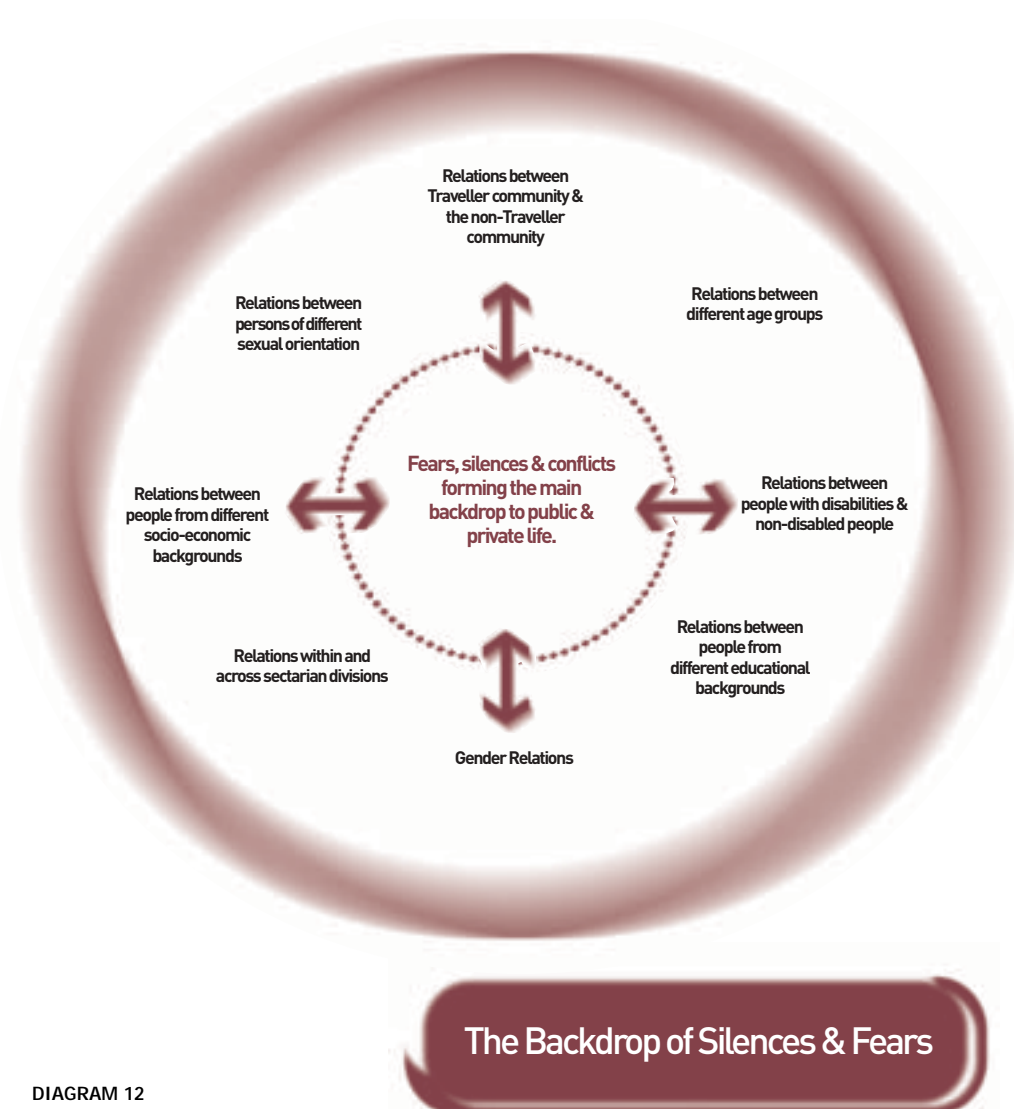


DIAGRAM 12

<sup>25</sup> Kaptein, R., *On the Way of Freedom*, Dublin: Columba Press, 1993.  
<sup>26</sup> Wright, F., *Northern Ireland: A Comparative Analysis*, Dublin: Gill & Macmillan, 1987.



### **Purpose of the Framework**

The Framework has been developed on the basis that Northern Ireland's transition is presenting organisations and communities with new challenges and learning needs.

It is a process framework designed to support organisations understand, define, implement and audit a process of change emerging from their value base and purpose. This exploration could be done either as a process focused entirely on the principles of 'equity, diversity and interdependence' or it could be done in conjunction with some other fundamental review of the work team's purpose, direction or operation.

The Framework is focused on improving the quality of relationships which shape and inform an organisation's business - workplace, local communities, suppliers, customers, shareholders, and investors - in the belief that relationships based on trust contribute more to sustaining an organisation's business and sustaining wider social cohesion than relationships based on silence and conflict.

The Framework is challenging organisations to:

#### **Understand**

- The full diversity of their own team and the extent to which this can be used as a strength;
- The nature, depth and importance of the different inter-relationships between those working within an organisation and all those outside the organisation with whom they relate;
- How they are being 'fair' to all the conflicting interest groups.<sup>27</sup>

#### **Define**

- How the concepts of equity, diversity and interdependence can improve the effectiveness of an organisation through identifying the costs of silence and avoidance;

#### **Implement**

- Effective strategies as part of core organisational business to become a more openly diverse and fair organisation.

#### **Audit**

- The impact of the process on improving operational goals.



<sup>27</sup>Cameron, J.C., *Relationships and Interdependence in the Workplace*, Belfast: Counteract & Future Ways, University of Ulster, 2001.



Some of the reasons why an organisation might use the Framework are:<sup>28</sup>

- A significant change in the size of the organisation or work group, whether through redundancies, significant growth or a merger.
- A sense of need for a 'change of gear' in any aspect of the organisation's activities.
- An awareness of a growing problem in any aspects of the organisation's relationships with any of its stakeholders: employers, employees, customers, community, and shareholders.
- A decision to undertake a fundamental reappraisal of employees terms and conditions of employment.
- Changes in the wider social, legislative, economic and political environment.
- A wish to be an employer of choice, attracting staff and investment because of their emphasis on relationships.

**The Framework is designed to facilitate reflection on existing practice, examine what has worked and not worked and design practical next steps, which build on the experiences and atmosphere of a learning organisation. It should not be seen as additional or stand-alone.**

<sup>28</sup> Adapted from Cameron, J.C., Relationships and Interdependence in the Workplace, Belfast: Counteract and Future Ways, University of Ulster, P8., 2001.





#### 4 DISTINCTIVE CHARACTERISTICS OF THE E.D.I. FRAMEWORK

There are a number of reasons why the EDI Framework is distinct from many other quality models.

1. **The Framework argues for the 'added value' of Northern Ireland.** Most people perceive Northern Ireland as an irrelevance or as a problem. However, since the late 1960s, the region has developed a deep understanding of the difficulties of balancing two issues at the heart of any society: self-determination (diversity) and fair participation (equity). These issues are sharpened and exposed in a place like Northern Ireland where the costs are more evident. And yet these issues lie at the heart of all societies, structuring institutions and relationships and impacting on levels of growth and prosperity. Northern Ireland's communal knowledge has shaped the development of the Framework, surfacing key themes that remain untouched by many other quality tools.

Northern Ireland has great potential to become one of the most creative European regions through new energies being released by people 'securing their place' in relationships with others. Northern Ireland will only realise this potential when it names the adaptive manner and the associated costs by which fears and silences have been accommodated. In setting our faces towards an interdependent future, valuing our differences and treating one another fairly, we can generate new energy, commitment and talents.

2. **The Framework is an influencer of change.** The Framework emerged from years of working in the midst of often dangerous conflict threatening the survival of communities and the workplace. The agenda then and now is challenging intimidation and inequality and supporting politicians, managers, workers, trade unions, community groups and chief executives understand the costs of fear.
3. **The Framework measures 'the immeasurable'.** Relationships are notoriously difficult to define in quantitative terms. This usually leads them to being described as 'soft' compared with the 'hard' world of data and economics. In reality data may be 'hard' but relationships are 'harder'. Numbers are often used to replace relationships or trust which ironically makes those who are doing the measuring and their measurements even more untrustworthy.

A significant struggle has been challenging the 'measurement culture' that exists in organisations reflecting a mechanical understanding of relationships with people seen as pawns to be pushed into certain strategic positions. At its worst, this culture can be broken down into a number of characteristics:

- The reduction of complexity to 'make things easier for people' rather than creating a level of engagement and understanding where people acknowledge and deal with complexity.
- The introduction of objects and tools that treat people as isolated and distinct figures divorced from their relationships and contexts.
- The urge to control rather than foster participation and learning.
- The maintenance of existing power relationships.



4. **The Framework focuses on relationships and interdependence.** Our freedom to learn and change is dependent on the quality and range of relationships we live and work through. Organisations wishing to develop the abilities of staff or members must focus on the kinds of human relationships that acknowledge and promote learning, giving people the confidence to move away from the 'known'. Fear, silence and prejudice limits this freedom and people become diminished as human beings.

The majority of change processes that fail do so because they are not shaped by an understanding of relationships. Instead, they focus on technical processes such as training and policy development, whilst ignoring that the successful implementation of these packages depends on sustaining or changing existing levels of trust and communication.

5. **The Framework supports the role of an external voice in a change process.** Experience has taught us that organisations need external voices or partners to challenge deeply held assumptions and ask the questions no one else dares ask. In the development of this project, we were initially independently funded which established a pattern of engagement that allowed us, as external voices, to continue asking hard questions. The Framework has been developed on the basis of an internal/external dialogue which supports the organisation begin addressing hard issues.
6. **The Framework emphasises the relationship between an organisation and society.** Organisations exist in environments with which they interact. The nature of that environment will influence/shape the internal culture and how relationships are conducted. The challenge facing organisations is whether they replicate, deepen or change wider inequalities and divisions within their work processes.

"Can organisations become places where new structures and systems help people learn to build new relationships, carry that knowledge across different networks in society and contribute to wider social cohesion?"<sup>29</sup>

7. **The Framework is about moving from adaptive to generative learning**<sup>30</sup>. We learn and change through our relationships. However, most organisations tend to define learning as the acquisition and sharing of vast amounts of information and data to adapt to a changing environment. There tends to be less focus on generative learning, which seeks to change the environment and relationships within which we live and work.
8. **The Framework understands that change is non-linear.** There is a tendency to assume or hope that change is a linear process where one thing happens after another. In reality, many events happen simultaneously with often less than predictable outcomes. However, organisations tend to function with expectations of controllable and quantifiable outcomes and resist the chaos and disorder introduced by any credible change process. Yet it is through that disorder that something different can be created. The Framework attempts to balance the need for disorder, if new knowledge and practice is to be developed, with the necessary order for decisions to be taken.

<sup>29</sup> A Question put by Christoph Kopke, CEO, Daimler Chrysler, South Africa, at the EFQM Conference - Istanbul, 2000.

<sup>30</sup> Senge, P., "The Leader's New Work: Building Learning Organisations" Sloan Management Review, Vol. 32, No 1, p.10., Fall 1990.







9. **The Framework evolved through partnerships.** Organisations cannot grow and develop through an isolationist mentality. Developing partnerships is increasingly becoming a key component in the achievement of operational goals. This Framework has been developed through different partnerships. It establishes a base on which different kinds of organisations across the public, private and not-for-profit sectors can begin learning across lines, growing a partnership culture.
10. **The Framework encourages people to move beyond fear and silences.** Fear freezes people and limits their potential as human beings. However, as a holding position, it is often safer to avoid dealing with the effects of divisions on relationships. This silence has allowed Northern Ireland and its institutions to function in ways that often looked normal, covering up the deep fears and tensions which were managed rather than transformed.

Intimidation was, and for many it still is, the mark of this society. This inhibits people's freedom to take risks and, at a fundamental level, forces people to stay with 'the known'.

It is the repeated experience of both the organisations developing the Framework that people from diverse identities and histories can develop relationships and structures that take them beyond enmity and distrust.



# SECTION B

## Using The EDI Framework

### 5. BUILDING BLOCKS OF THE EDI FRAMEWORK

- 5.1 Measures for Changing
- 5.2 Areas for Changing
- 5.3 Steps for Changing

### 6. STRUCTURING NEW DIALOGUE

### 7. CRITICAL QUESTIONS

### 8. AUDITING THE PROCESS



## 5 BUILDING BLOCKS OF THE EDI FRAMEWORK

The framework consists of three building blocks:

<b>Building Block 1.</b>	<b>Measures for changing</b>
<b>Building Block 2.</b>	<b>Areas for changing</b>
<b>Building Block 3.</b>	<b>Steps for changing</b>

The **measures for changing** are the principles of Equity, Diversity and Interdependence, in action, shaping and auditing progress.

The **areas for changing** refer to the key organisational functions and systems where practical change needs to occur.

The **steps for changing** outline the distinct stages of the process.

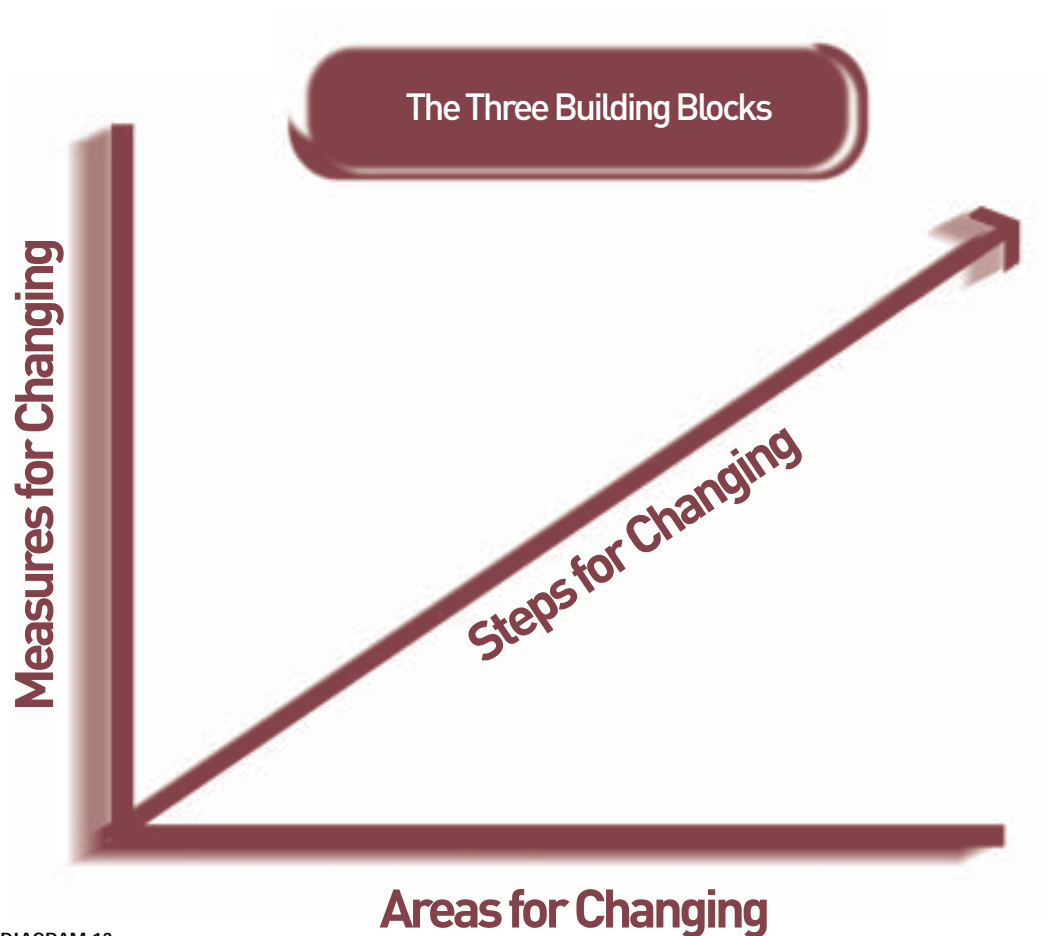


DIAGRAM 13



## 5.1 MEASURES FOR CHANGING

From the principles of Equity, Diversity and Interdependence we have identified four measures to assist organisations plan and audit progress. These are:

- To be inclusive.
- To be relevant.
- To be accountable.
- To be sustainable.

### 1 Being Inclusive

To be **Inclusive** is about:

- 'Who's in and who's out'
- 'What is it about our structures and culture that might marginalise or exclude those who are different?'
- 'Who makes the decisions and how are they made?'

### 2 Being Relevant

- To be **Relevant** requires us to become aware of diverse needs and contexts, ensuring that new initiatives and programmes engage with the 'confusing complexity of people, families, communities, livelihoods'<sup>31</sup> rather than reducing complexity to one standard model.
- To be relevant is valuing different identities, backgrounds and experiences as well as the diversity of functions, organisational processes and tasks the organisation is committed to.
- To be relevant means making sure that the process is relevant to, and begins with, the differences that exist in an organisation.
- To be relevant is to deal with the current realities. This means unpacking those issues that are identified and grow the capacity and understanding of all about the possibility of working to a shared vision. It is about making sense in different ways to different people.

### 3 Being Accountable

- To be **Accountable** is about becoming aware that we are connected to others and, as such, carry a responsibility to behave and communicate in ways that are trustworthy and open.
- To be accountable is the ability of individuals, groups and organisations to identify, be continually alert to, engage with and report on progress to their various and different stakeholders.

### 4 Being Sustainable

- To be **Sustainable** requires sustained commitment. Balancing the need for 'quick wins' against a long-term vision is an essential part of planning and implementation. This framework approach is interested in deep cultural change within an organisation, growing a way of treating one another that outlasts individual leadership personalities. This requires continual commitment of resources and personnel. It is not a 'one-off' experience.

<sup>31</sup> Boyle, D., The Tyranny of Numbers - Why Counting Can't Make Us Happy, Harper Collins Publisher, p.40., 2000.





## 5.2 AREAS FOR CHANGING

There are four 'areas for changing'. These are:

- Leadership.
- Setting Direction.
- Internal Relationships.
- External Relationships.

### 1. Leadership

'When a person rises to a place of authority that exceeds their wisdom then we have a problem.'

This framework process is about supporting a style of leadership that is about exploring new ways of seeing old issues and generating new ways of looking at the world.

The framework challenges two traditional notions of leadership - one emerging from the context of insecurity and fear in Northern Ireland, the other, intrinsic to Western culture.

The first notion of leadership arises in a context of insecurity where the common sense response of those in leadership positions is to hold things together and 'adapt' to prevailing conditions. Adaptive responses such as 'politeness', 'avoidance' of difficult conversations and issues and 'silence' are all survival mechanisms. Such leaders protect what they know and avoid the unknown.

The second traditional notion of leadership comes from the heroic model of the lone leader at the top responsible for setting direction and controlling movement. Peter Senge argues that effective leadership is not related to hierarchical positions but is about the capacity to think, reflect and act creatively in achieving an organisation's goals and business.

Senge identifies three broad categories of leadership core to growing learning cultures:<sup>32</sup>

- **Internal Networkers - 'Networking Leaders' or Community Builders**  
Networking leaders come from different parts and grades in an organisation. Their strength is their ability to move around the organisation, to cross departmental and hierarchical lines. They link into the informal networks and relationships that shape organisations. Their role is to participate in and grow trust across departments, grades, different parts of the organisation and to help 'executive' and 'local line' leaders implement change. They are the 'seed carriers' of new ideas and practices. They carry ideas, support and stories through the organisation.
- **Local Line Leaders / Managers**  
These are the front-line managers who are responsible for getting the work done. These people are vital because they and their colleagues have the authority and experience to test out the practical impact of new ideas and approaches. Winning them over is key.
- **Executive Leaders - 'Formal Leaders'**  
They establish the overall direction and give permission to others to move. They help create an environment where people can learn and grow. They must give up feeling that they have all the answers and start listening. Through being vulnerable, they give strength for others to say 'we don't know'.

<sup>32</sup> Adapted from Senge, P., et al, *The Dance of Change*, Doubleday Publishing, pp., 16-18, 1999.



## 2. Setting Direction

This area of competence is primarily to do with the ability to acknowledge reality yet keep people focused on the vision for the organisation.

The task of setting direction implies that the organisation is moving to becoming a learning organisation and that the leaders examine how current working practices can assist or challenge the ongoing process.

Setting direction implies that people are able to articulate their commitment to the principles within the planning, implementation and evaluation procedures of the organisation.

## 3. Internal Relationships

This is about the quality of the relationships between all people working in an organisation and the manner in which these relationships impact on the core business.

Executive leaders will be expected to show an understanding of their local and international context (if applicable), demonstrating a knowledge of how the local political context, national and European policy impacts on internal relationships.

Executive leaders will be expected to bring these understandings to the systems and procedures they establish internally with managers and staff. Networking and local line leaders will be expected to actively confront poor practice, ensuring that the workplace culture encourages creativity, welcomes difference and values co-operative working practices.

## 4. External Relationships

This area of competence involves the extent to which the organisation understands how it relates to others, and how its effectiveness as an organisation shapes and is shaped by the quality of these external relationships.

Stakeholders include the families of staff, the communities in which the company is physically located, the suppliers of resources, the directors and shareholders, the community organisations and elected political leaders.



## 5.3 STEPS FOR CHANGING

The 'steps for changing' outline the distinct stages of the process.

We have identified seven key steps that we believe map out the process of change. Although these are set out in a linear fashion the reality is that this process is organic and developmental. There may be different starting points. The process is characterised more as tentative exploratory steps initiated where opportunities emerge rather than a planned linear process. Organisations need to sustain the process at each step continuously revisiting past decisions and learnings in light of any new developments.

Between each step is a **reflection** space. This provides an opportunity to surface critical assumptions, dilemmas and ambivalences and to agree and plan the next step based on consent. It is vital that these reflection spaces are shaped by a dialogue between the formal or executive leadership, such as the Senior Management Team (see STEP 2A) and the new and informal groups created to support the process, such as the Development Group (see Section 6, Dialogue Structure 3).

### STEP 1 Invitation

The Framework is built on an internal-external dialogue. The role of the external partner is critical to the process as they connect the organisation to new networks, ideas and experiences, challenging the insularity that protects organisations from acknowledging the dilemmas of division.

This step has two strands. The first strand is about the formal leadership engaging with the ideas. The second strand initiates the preliminary negotiations with the external partner. Getting these first engagements right is crucial since they can set the tone for the rest of the process. Of vital importance is who conducts these negotiations internally and whether they are linked to the mainstream planning processes.

Key themes include the need to:

- Grow an understanding between the organisation and the external partner.
- Establish credibility between the partners.
- Secure resources for the programme.
- Formalise the partnership in terms of core principles, aims and objectives.
- Develop initial communication systems to keep the wider organisation informed.



## **STEP 2    Establishing / Sustaining The Critical Dialogue Process**

Step 2 has two parts.

**Part 2A** - is beginning to grow a learning culture within the formal/executive leadership group to clarify their roles and responsibilities in this process.

**Part 2B** - legitimises new and informal leadership through the establishment of a Development Group.

This step deepens the quality of dialogue between the external partner and organisation.

## **STEP 3    Growing Leadership Commitment and Understanding of Equity, Diversity and Interdependence**

This step brings both the formal and informal leadership into a new conversation regarding whether relationships are based on the principles of fairness and valuing difference within the organisation and models of leadership (see 5.2). It unpacks the tacit assumptions and culture that shape relationships both within the organisation and in the wider community. It also explores the possibilities for meaningful change and what this would look like for the organisation's core business.

## **STEP 4    Identifying Issues**

Many organisations in Northern Ireland have evolved structures, cultures and ways of working which deny the wider political context and its impact on relationships. Arguably, in the absence of alternative models, this has been the most logical defence mechanism against the chaos and pain in the wider community. The only time when issues were acknowledged was through responding to fair employment legislation or through reacting to crises. As a rule, the mainstream business of organisations has been kept well away from the divisions.

Identifying the issues is therefore more than a technical process - it asks people to take risks with one another and surface experiences and feelings that, to date, have limited relationships. It is these issues that ground the process in the reality of organisational life and sets out the change agenda. Through the process, people begin to learn together rather than apart.

## **STEP 5    Growing Commitment and Understanding Across the Wider Organisation**

This is about expanding the conversations, training and commitment beyond the initial small groups to the wider organisation. In the literature on 'organisational change' there are many examples of the first pioneers of change becoming isolated from their colleagues through what often verges on an evangelical zeal with the process.

It is important that this step is not conducted in a technical manner but builds on the relational way of working that the informal leadership and formal leadership groups now understand. It is not just a matter of replicating models developed within those two groups, but growing the commitment of the wider organisation in ways that are appropriate for the different situations people face.





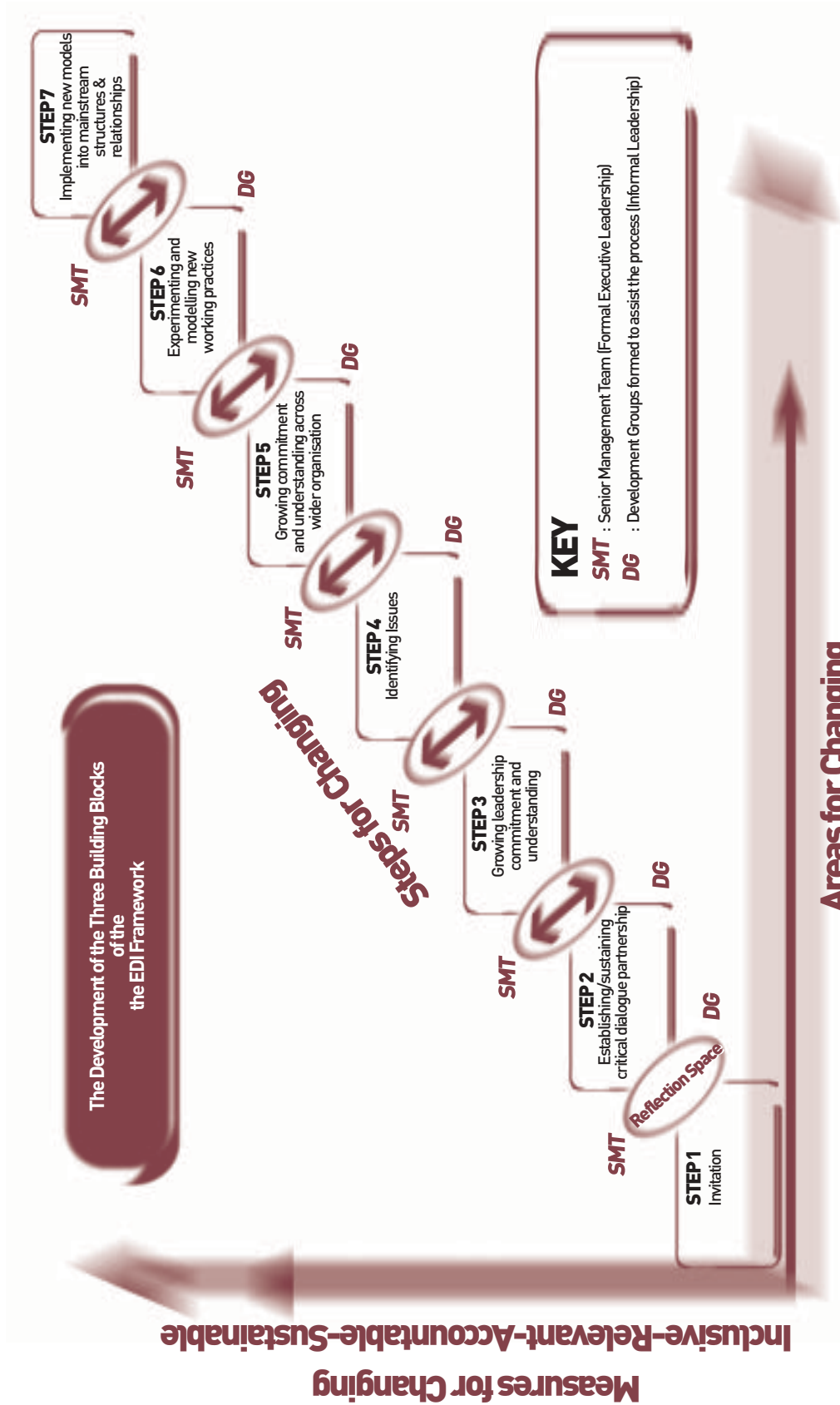


### **STEP 6    Experimenting and Modelling New Working Practices**

This is about experimenting with ways of implementing the vision and addressing the issues raised. This requires building support and understanding across the organisation, piloting new ways of working, experimenting with new policies, structures and support mechanisms. It is about creating a new culture of learning where differing opinions are articulated, criticisms are acknowledged and the emotional and intellectual challenges of change are heard.

### **STEP 7    Implementing New Models of Practice into Mainstream Structures and Relationships**

This step is about sustainability and maintaining a critical tension between the current realities and the organisational vision of what could be. This is about recognising that engaging with the principles of 'equity, diversity and interdependence' is not a one-off initiative but about mainstreaming the capacity of the organisation and its staff to learn and innovate in an increasingly complex and diverse world.



**Areas for Changing**  
**Leadership-Setting Direction-Internal Relationship-External Relationship**



## 6 STRUCTURING NEW DIALOGUE

### Structuring A New Dialogue - Four Dialogue Structures

The Framework approach depends on the quality of new discussions that take place between all involved. These new discussions are assisted by a number of dialogue structures.

We have identified four dialogue structures that support the creative tension generated when organisations focus on both their current realities and future vision. This creative tension is at the heart of the EDI process of learning and changing.

The first three dialogue structures are internal to the organisation. These are:

1. Hearing Different Voices.
2. Sustaining the Tension between Informal and Formal Spaces.
3. The Development Group Model.

The fourth dialogue structure characterises the relationship between the organisation and the external partner(s), when engaged in such a change process.

4. Internal-External dialogue.

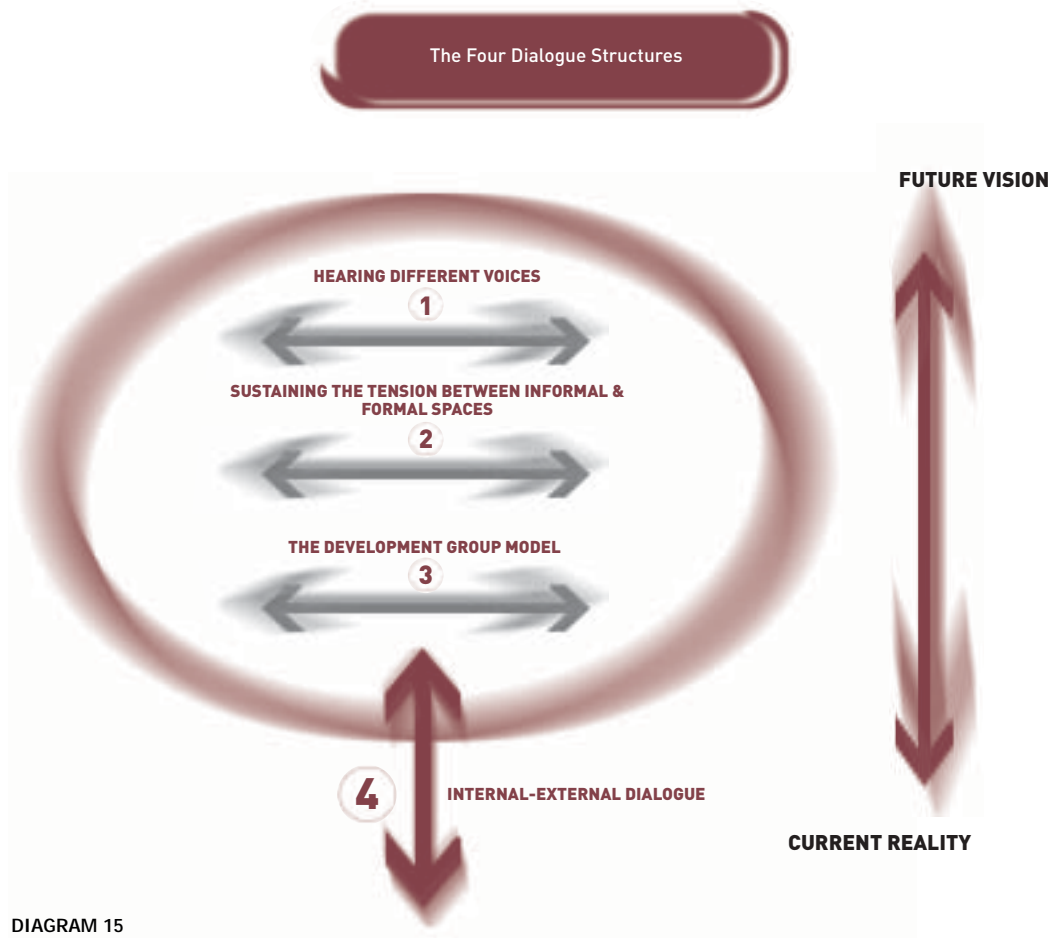


DIAGRAM 15



Within each dialogue structure:

- The process is first and foremost the protection and development of a quality of relationship that allows real dialogue and more honest and open relationships.
- The dialogue is about locating the business of the organisation within a wider framework of building a cohesive, stable and sustainable society.
- We learn to make sense of the world through connections and relationships not through fragmenting life into distinct compartments. This process is about moving beyond the 'silos' that characterise many organisations towards enabling people to understand 'the whole'.
- The voice of the excluded or minority perspectives are given space and voice.

## DIALOGUE STRUCTURE 1

### Hearing Different Voices

Acknowledging and listening to different voices is only possible through new relationships and structures. This requires a deep sensitivity and awareness of the dynamics between those who feel in a minority position and those in the majority. This includes acknowledging that minorities will often respond to the failure of the centre to recognise them by retreating into identity politics.

This process requires us to move beyond perceived group identities and meet each other as human beings.

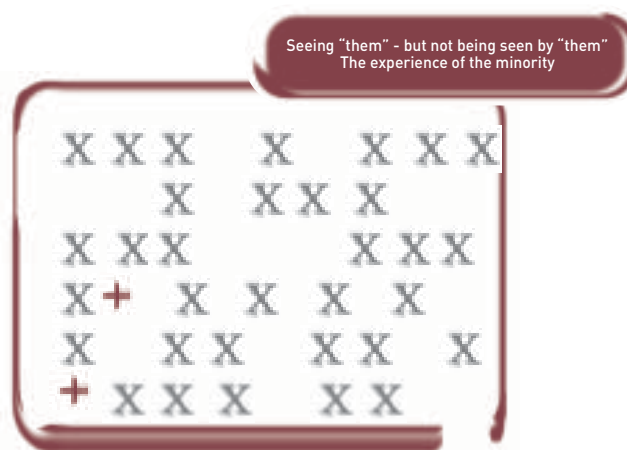


DIAGRAM 16

'Majorities' are often blind to 'minorities' because there are so few of 'them' and 'they' often do not impact on the daily life of the majority. You do not see the '+' if you are an 'X'.

The Framework supports organisations design structures where people who are perceived as belonging to majorities and minorities meet each other as human beings and enter into a new discussion. This allows the fears and experiences of the 'other' to be acknowledged. Only through a quality of listening and engagement will relationships change.



Legislation and political correctness have meant that 'minorities' are increasingly being noticed. However, if relationships are based on a degree of silence and caution, legislation can lead to the hard issues being pushed further underground. Political correctness can also, in such situations, push prejudices further away rather than challenge them.

Our dialogue approach invites people to meet one another, to hear 'other' sides and, through stronger relationships, increase the capacity for 'takeable risks'.<sup>33</sup>

Our experience is that organisations with majority/minority structures need to develop a new space where the organisational balances are challenged and minorities given an enhanced voice.

**"For a white majority team to hear what it means to be the only black person, having to put on a 'white face' every morning before going to work, is a powerful learning experience that immeasurably strengthens the team."**<sup>34</sup>

---

<sup>33</sup> See UNICEF model in Appendix C (Ladder of Participation)

<sup>34</sup> Birmingham Council Officer in a workshop for staff from Northern Ireland, October 1999.



## DIALOGUE STRUCTURE 2

### Sustaining the Tension between Informal and Formal Spaces

#### Informal Spaces

Hearing different voices is initially made possible through the creation of informal spaces within an organisation. The informal spaces are opportunities for people to meet outside hierarchies with the mandate to experiment and develop new ideas and working practices. They offer people opportunities for experiencing the possibility of new relationships.

For example, a new discussion between a refuse collector and a local councillor working in the same Council for 25 years. Such new experiences within informal spaces challenge and engage the formal structures.

#### Formal Spaces

The formal spaces and structures are less about experimentation than implementation. Formal spaces are the structures that meet the goals and objectives of the organisation. Formal spaces acknowledge organisational structures, procedures and hierarchy.

The informal should never eclipse the formal, whilst the necessary limitations shaping formal structures and culture should not intrude into the space for reflection and the generation of new ideas.

The characteristics of the informal and formal spaces are visualised below.

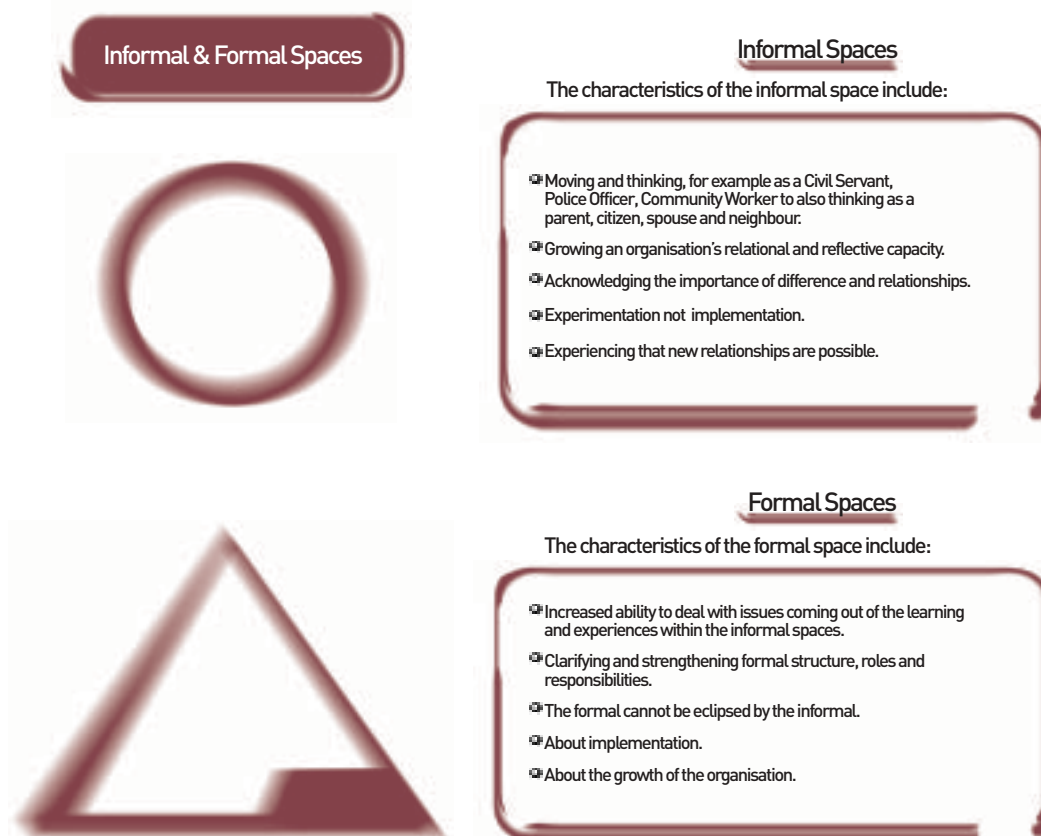
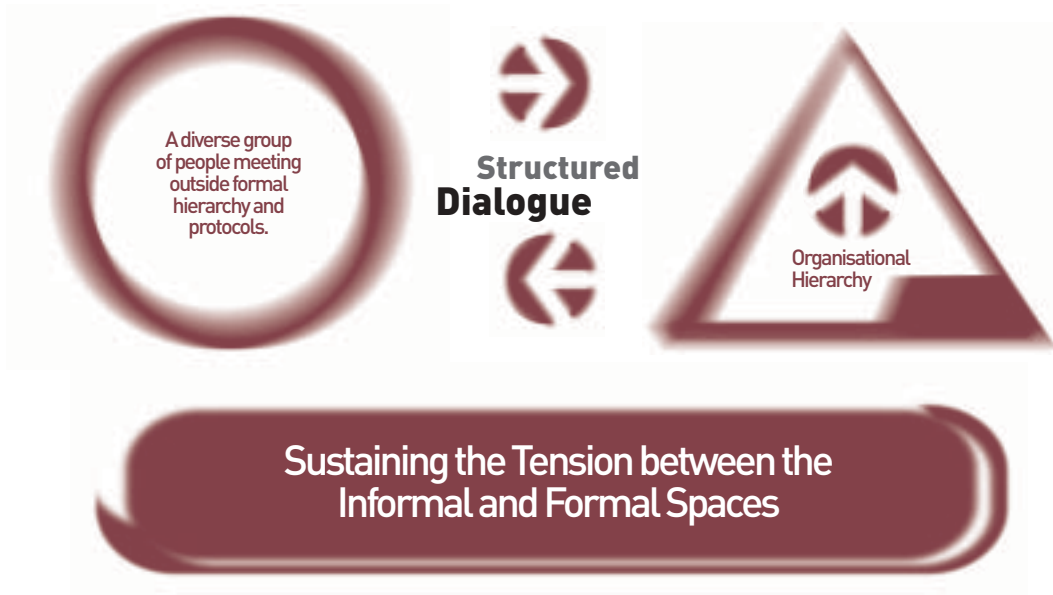


DIAGRAM 17

The dialogue between the formal and informal spaces is the structured dialogue underpinning the EDI Framework.

DIAGRAM 18



### DIALOGUE STRUCTURE 3

#### The Development Group Model<sup>35</sup>

The creation of a **Development Group** as an informal space offers an opportunity for a group of people from diverse levels of the organisation, different functions, backgrounds and experiences to listen to realities different from their own. It will take time for the group to move away from their hierarchical and representative responsibilities and for the membership to consist of those who wish to be there rather than those told to be there.

The Development Group is an ‘across grade, top to bottom channel’ in which organisational secrets about what is tacit are acknowledged. The unspoken can be spoken about with the group becoming a space where people of different grades can share personal experiences of working in the organisation without reprisal.

An enlightened management team will seize such information as new information important to the health of the organisation rather than as a challenge and rebuttal of their position and experience.

<sup>35</sup> See Appendix D



## DIALOGUE STRUCTURE 4

### Internal-External Dialogue

The external partners are not experts. The role of the **external partner(s)** in the internal-external dialogue process is:

- To share levels of experience and knowledge developed outside the organisation and to acknowledge the depth of experience held by the organisation.
- To ask questions and design spaces where people can explore issues that are relevant for the business of the organisation.
- To act as citizens concerned with growing communities and a society rooted in common mutuality, fairness and pluralism.
- To protect the informal space and help mediate difficult conversations
- To be concerned with and sensitive to the needs and outcomes of the development group, not the clients.
- To be always willing to raise critical questions for the organisation, not become part of it.
- To support the translation of informal learning, if appropriate, into the formal space.
- To move between different roles as citizens, professionals and members of the wider community.





## 7 CRITICAL QUESTIONS

### CRITICAL QUESTIONS

Each of the seven steps has been broken down into a set of **Critical Questions**.

These questions are designed to guide a team, group or organisation to understand, define, implement and audit an 'EDI' change process. The questions can be used to stimulate discussion and reflection between an organisation and its external partners.

The **Critical Questions** are about building new working practices. How they are used will depend on the issues and questions currently facing the organisation arising from the changing political / social / economic context as well as its internal dynamics.

At the conclusion of each step there is a **Space for Reflection** (see DIAGRAM 14) and dialogue between the formal / executive leadership (Senior Management Team - SMT) and informal new leadership such as the Development Group (DG). At the end of this reflection there is a decision either to commit to the next phase or to leave.

### General Structures

Each Step is introduced by the key objectives and some background discussion. The Critical Questions are then set out to help an organisation think through the kinds of issues that need to be considered at this stage of the process. The Step concludes with key outcomes and a story of how an existing organisation has approached this Step.

## STEP ONE



## STEP 1 INVITATION

The Framework is built on an internal-external dialogue. The role of the external partner is critical to the process as they connect the organisation to new networks, ideas and experiences, challenging the insularity which protects organisations from acknowledging the dilemmas of division. If an external partner is not readily available, some staff or training department members could be invited to perform this critical dialogue function. In our experience such an arrangement can only work if their freedom to be critical is safeguarded and that future promotion is not dependent on an acceptable outcome from the process.

This first step has two strands.

The **first** strand is about the formal leadership engaging with the ideas. The **second** strand initiates the preliminary negotiations with the external partner.

Getting these first engagements right is crucial since they can set the tone for the rest of the process. It is vitally important that those from the organisation who conduct the negotiations for the organisation are committed and linked with mainstream planning processes in the organisation.

Key themes include:

- The organisation and the external partner developing an understanding of each other.
- Acknowledging the values and history of each partner.
- Securing resources for the programme.
- Formalising the partnership in terms of core principles, aims and objectives.
- Developing initial communication systems to keep the wider organisation informed.

## STEP ONE

### Objectives

#### Strand 1 Within The Formal Leadership Group

- To acknowledge the sources of and pressures on the organisation to develop an organisational programme around Equity, Diversity and Interdependence.
- To establish a dialogue within the formal leadership group about developing an organisational change programme around Equity, Diversity and Interdependence.

#### Strand 2 Between the Formal Leadership and an External Partner

- To establish the dialogue between the formal leadership and an external partner.
- To examine the learning needs of the organisation.
- To grow an understanding between the potential partners about their respective values and histories. These will shape the critical dialogue process.
- To obtain a clear commitment to proceed to Step 2.





## The Process

This is the beginning of a process between the formal leadership of an organisation and an external partner.

There may be a number of legal, societal and business levers for undertaking this process.

A list of organisations that may be open to such an approach might include:

- A central government department responding to a centrally driven requirement to address issues of diversity.
- An Intermediate Funding Body or Local Strategic Partnership charged to deliver Peace and Reconciliation funding in a fair and equitable manner.
- A new company wishing to establish itself locally and establish a broad profile.
- A local council wishing to articulate its Civic Leadership function and promote itself as a Borough that is attractive to inward investment.
- An integrated school Board of Governors.
- A controlled, maintained or voluntary school Board.
- A Section 75 criticism from the Equality Commission.
- A voluntary organisation that has associations with one tradition now wishing to change its internal working structures and practices to accommodate more diverse interests.
- An organisation that has had a predominantly male recruitment pattern now wishing a more equitable gender balance.
- A new company or organisation that, by virtue of its location and local employee balance, wants to establish good relations with all local communities around its perimeter.
- A company or organisation with a history of harassment and bullying having to examine its working practices and culture.
- A single gender school transforming itself to cater for both male and female pupils.

In Step 1 the formal leaders of the organisation are examining the possibilities of an Equity, Diversity and Interdependence Framework approach for their organisation.

## STEP ONE





The challenges each partner faces are:

**For the Organisation**

- Are the issues so important to us as leaders that we are prepared to examine the internal working culture of our organisation and our relationships with our external stakeholders?

**For the External Partner**

- Will this organisation listen to our difficult questions about their practice and work with us in a reflective manner? Are we able to engage with them in this process in a confidential and supportive manner?

**Both Partners**

- The notion of becoming a learning organisation is central to this approach. At the end of this phase both partners need to consciously reflect on the learning they have developed and the challenges their relationship will face if they move to the next stage.



STEP ONE





**STEP 1 INVITATION**

**INCLUSIVE**

**Leadership**

1.1 Who is involved from the formal leadership in beginning to explore the possibilities of an 'Equity, Diversity and Interdependence' process?

**Setting Direction**

1.2 Are those with a policy / decision making responsibility involved?

**Internal Relationships**

1.3 Who should be involved in this preliminary stage from the wider organisation?

**External Relationships**

1.4 Who is involved externally?

**RELEVANT**

**Leadership**

1.5 Why enter this process?

**Setting Direction**

1.6 How could this process connect with our strategic direction?

**Internal Relationships**

1.7 How is this process relevant for the internal relationships within our organisation?

**External Relationships**

1.8 How is this process relevant to our external stakeholders such as the wider community, clients, service users and customers?

**ACCOUNTABLE**

**Leadership**

1.9 What is this going to mean for us as a group of decision makers?

**Setting Direction**

1.10 What is this going to mean for our current strategy?

**Internal Relationships**

1.11 What is this going to mean for our staff in terms of time, resources and commitment required?

**External Relationships**

1.12 What will this mean in terms of delivery of services, provision and community involvement?

**SUSTAINABLE**

**Leadership**

1.13 How are we going to take this forward?

**Setting Direction**

1.14 How might this process impinge on existing policies / strategies?

**Internal Relationships**

1.15 How do we intend to engage the staff? How are we going to sell it to them?

**External Relationships**

1.16 How do we intend to engage with our external stakeholders?

**STEP ONE**





## STEP 1 OUTCOMES

### Overall Outcomes

- A dialogue is established within the formal leadership group about the need to develop an organisational change programme around Equity, Diversity and Interdependence.
- A meeting has taken place between the organisation and an external partner (or a group of internal members are mandated to develop a process).
- The leadership of the organisation agrees to examine the learning needs of the organisation and develop such a change programme.
- There has been a growth in understanding between the potential partners regarding histories and value bases.
- A clear commitment has been made to proceed to Step 2.

STEP ONE





## STEP 1 Practical Stories

### Story 1

#### A Rejection

"We were invited to make a presentation to the Senior Management Team (SMT) on the EDI Framework. This was two years after we had provided training to Management and Staff on Sectarian Harassment. The Human Resources Manager indicated that the organisation now wished to engage in a programme to address the wider issues of Equality and the question of flawed relationships within the company.

After a presentation to the Senior Management they indicated that they did not want to proceed with the programme. Their reasoning was they were not, at this stage, in a position to make the commitment in relation to the time involved as they were on very tight production targets. In addition they were fearful of the issues that might arise. Although they had rejected the programme they indicated they wished to engage in a less intensive project.

The response from this company is not unusual, and in some respects understandable. If the Senior Management is not ready for the commitment then it is better they do not embark on such a programme of work. Without management commitment such processes will frustrate their people."

### Story 2

#### A Complaint

The first contact with a local district council was when they invited us to provide awareness training on 'Harassment and Prejudice' to Management and Staff. This essentially was a result of a recent complaint of discrimination by an employee.

At a meeting with the Chief Executives and Management in relation to the programme a discussion took place on the value of engaging in a more intensive project on organisational change. The work on Equity, Diversity and Interdependence was mentioned.

We were invited to make a presentation to the full Council. The Council agreed that they wished to engage in the project.

There were a number of influences shaping this decision:

#### Being Inclusive

1. The timing of this proposal in relation to a recent fair employment case and a Section 31 Review regarding workforce balance.

#### Being Relevant

2. This proposal was relevant to the Council with regards to potential cost savings, improving public relations and growing better external relationships.

#### Being Sustainable

3. The Council was thinking ahead regarding the long term future of local government and the increasing emphasis on a council responding to all those who live and work within its boundaries.

#### Being Accountable

4. The need to be accountable to both majorities and minorities.

#### Other

5. The external partners' previous engagement with the Council.
6. External funding for the project being available.





## STEP 2 ESTABLISHING / SUSTAINING A CRITICAL DIALOGUE PROCESS

Step 2 has two parts.

**Part 2A** - is beginning to grow a learning culture within the formal / executive leadership group to clarify their roles and responsibilities in this process.

**Part 2B** - legitimises new and informal leadership through the establishment of a Development Group.

This step deepens the quality of dialogue between the external partner and organisation.

### Objectives

#### 2A Establishing a Critical Dialogue

- To establish a critical dialogue between the formal leadership group (e.g. senior management, executive board, directors) and the external partner;
- For the formal leadership group to examine the implications of establishing an informal leadership group such as the Development Group.

#### 2B Establishing a Development Group

- To establish the Development Group by identifying key people in the organisation who are mandated to develop the process.
- Within the Development Group to grow a learning culture outside normal hierarchical relationships.
- To establish a set of agreements within the Development Group about how people will work with one another.

STEP TWO



**The Process**

Following on from the decision to commit to this phase, it is important that the formal leadership group now examines how they might establish a diverse group of people representing the different internal stakeholders and levels of leadership to form a Development Group.

**It is important that the Development Group carries a representative dimension across the organisation and that it is not only filled by 'yes people'.**

Finding ways by which different 'minorities' have a voice is central to this process. In our experience, when dealing with issues of religious/political tradition or gender, we have asked for a minimum of one-third membership to be from the minority group or tradition.<sup>36</sup> Such a minimum requirement will, for many organisations, generate a new dynamic and discussion around the issues of exclusion and relationships. In the event of it being impossible to secure a minimum of one-third representation, other ways should be sought.

In organisational terms the Development Group structure creates a parallel space where people meet under the authority of the organisation but in a different manner. Their task is to develop and articulate a relational understanding of the organisation's place and purpose.

The challenge in the Development Group is that people explore ways to meet and do business in a different space ( ○ ) while knowing that the task is about how these learnings and understandings are translated into the on-going work and structures of the organisation ( △ ).

STEP TWO

**Changing Organisational Governance**



**The Dialogue between the Development Group and The Formal Structures.**

DIAGRAM 19

<sup>36</sup> See UNICEF model in Appendix C (Ladder of Participation)



## Establishing a Development Group (see Appendix D)

It is useful to consider the following points when establishing a Development Group:

- For the organisation and the external partner to establish key criteria for membership of the Development Group based on ensuring a representative group of people that bring different experiences. It is important to invite and include some of those who are initially sceptical or opposed to this process yet are committed to the organisation.
- For the different constituencies (eg. trade unions, staff, councillors, senior managers, middle managers, Board Members) to commit themselves to nominating representatives based on these criteria.
- For the Development Group to be no more than sixteen people.
- The membership from the different constituencies might change as the programme develops.
- Initially, the external partner should chair the Development Group as people grow an understanding of the process. Over time, we encourage organisations to nominate, empower and support a chair outside the traditional hierarchical structures. For example, in one organisation, a joint chair was selected with a young trade unionist and a clerical assistant, both representing the informal leadership networks.
- Membership of the Development Group must include either the Senior Manager or, in any case, a member of the Senior Management team.
- Each of the representative groups should agree communication procedures to enable members to feed back information.
- We suggest that the meetings of the Development Group be clearly structured both in terms of making time for business and setting aside time for learning and growth.

A final note that comes with an organisational health warning!

A breakdown of communication can occur when those on the 'inside' with the Development Group find it increasingly difficult to connect and communicate with the wider organisation, whilst those on the 'outside' become increasingly cynical and suspicious of their colleagues rushing off to meetings with no obvious outcomes. The isolation of 'heretics' is a common response of a system protecting itself against change.





**STEP 2A ESTABLISHING A CRITICAL DIALOGUE**

**INCLUSIVE**

**Leadership**

2.1 Are all those with decision making responsibilities involved at this stage?

**Setting Direction**

2.2 Are those responsible for policy integral to this process?

Are there distinct opportunities to rethink policy around 'Equity, Diversity and Interdependence' principles within the organisation taking account of the breadth of employee views?

**Internal Relationships**

2.3 Who carries the formal responsibility for internal relationships and are they involved?

**External Relationships**

2.4 How are the views of external stakeholders such as local communities, clients, suppliers and contractors included?

**RELEVANT**

**Leadership**

2.5 Does the current leadership see the relevance of the principles of 'Equity, Diversity and Interdependence' to their current context?  
How do these principles connect to the organisation's mission or value base?

**Setting Direction**

2.6 How could a Development Group structure fit within the organisation's core values and purpose?

**Internal Relationships**

2.7 How do people communicate within the organisation?

**External Relationships**

2.8 How might the organisation communicate the purpose of this process with external stakeholders and gain their support?

**STEP TWO**





## STEP 2A ESTABLISHING A CRITICAL DIALOGUE (contd)

### ACCOUNTABLE

#### Leadership

2.9 What does the critical dialogue model mean for us as a team of leaders in terms of the manner in which we work?

#### Setting Direction

2.10 What mechanisms will we put in place to assure the Development Group, staff and others that the issues raised by the Development Group will be considered by the formal leadership of the organisation?

#### Internal Relationships

2.11 What are some of the issues and concerns the formal leadership group has with regards to their relationships with the proposed Development Group?

#### External Relationships

2.12 What does this process mean for how the formal leadership group relates to the wider community and other external groups?

### SUSTAINABLE

#### Leadership

2.13 How will the formal leadership group establish the Development Group?  
How will they ensure that this action is openly communicated to all staff ?

#### Setting Direction

2.14 Where will the Development Group sit in relation to existing structures and policies?

#### Internal Relationships

2.15 Who are the minorities within the organisation and how will they have a voice in the Development Group?

#### External Relationships

2.16 How does the way the organisation relates to its different partners and stakeholders affect its understanding of its place and purpose?

## STEP TWO





## STEP 2A OUTCOMES

### Overall Outcomes

- Formal leaders have begun to deepen their understanding about what a learning culture within the formal leadership group might look like.
- The leadership is committed to establishing a Development Group that will include a diverse membership that reflects people from different grades and backgrounds across the diverse levels of the organisation.



## STEP TWO



## STEP 2B ESTABLISHING A DEVELOPMENT GROUP

(see Appendix D)

### INCLUSIVE

#### Leadership

2.17 Who are the formal leaders, line managers and networking leaders within the organisation?

Who from the formal, line manager and networking leadership plays an influential listening role and should be invited to participate in the Development Group?

#### Setting Direction

2.18 Are there people who hold the corporate view and bigger picture within the new Development Group (see 5.1 on 'Leadership')?

#### Internal Relationships

2.19 Who are the different internal stakeholders and how will they be represented on the Development Group?

How do you ensure representation in terms of:

all grades, locations, identities, sceptics, front-line people?

How do you ensure that the voice of minority groups is heard? (see 6.1)

#### External Relationships

2.20 Who are the external groups / leaders the Development Group needs to be aware of - if any?

STEP TWO

### RELEVANT

#### Leadership

2.21 How is the formal leadership prepared to empower the Development Group?

#### Setting Direction

2.22 What direction are the Development Group and the external partner open to developing?

What is the relationship between the 'Equity, Diversity and Interdependence' process and the organisation's existing value base and purpose?

#### Internal Relationships

2.23 What kinds of relationships exist within the organisation?

Who talks with whom and at what level?

Where are the silences?

Which issues are difficult to talk about and with whom?

#### External Relationships

2.24 What are some of the issues around majority / minority relations in the wider community from which the organisation draws employees or within which it serves or develops sales and services?

What are the relationships between different groups in the community and how do these impact on the organisation's working culture?





**STEP 2B ESTABLISHING A DEVELOPMENT GROUP (contd)**

**ACCOUNTABLE**

**Leadership**

2.25 What are the implications of the formal leadership being a member of the Development Group?

Is the external partner acceptable as an initial chair of the group until a new working culture evolves?

**Setting Direction**

2.26 How can the Development Group engage with policy / decision makers in the organisation?

**Internal Relationships**

2.27 How can the Development Group feed issues back to their different constituencies within the organisation?  
How will each Development Group member report to his or her constituency?

**External Relationships**

2.28 What relationships / understandings can Development Group members bring not only as employees but as citizens, parents and neighbours?

**SUSTAINABLE**

**Leadership**

2.29 What mechanisms could be established to develop open and critical relationships between the Development Group and the formal leadership?

**Setting Direction**

2.30 What are the next steps and how does setting up a Development Group link to wider organisational directions?

**Internal Relationships**

2.31 What mechanisms need to be established to ensure clear relationships and communication channels between the Development Group and the wider staff body?

**External Relationships**

2.32 How does the Development Group ensure that it does not become a purely internally focused group?  
How does the Development Group remain in touch with and aware of wider community dynamics and stakeholder needs?

**STEP TWO**





## STEP 2B OUTCOMES

### Overall Outcomes

- A Development Group is mandated to drive the process in partnership with the formal leadership group.
- A set of agreements about how people will work with one another has been made.
- Roles and responsibilities between the formal leadership and the Development Group are clarified and agreed.
- A critical dialogue has begun between the formal leadership group and the Development Group.
- A clear commitment has been made on both sides to proceed to Step 3.

STEP TWO







## **STEP 3      GROWING LEADERSHIP COMMITMENT AND UNDERSTANDING ABOUT EQUITY, DIVERSITY AND INTERDEPENDENCE**

This step:

- Brings both the formal and informal leadership into a new conversation regarding whether relationships are based on the principles of fairness and valuing difference within the organisation;
- Unpacks the tacit assumptions and culture that shape relationships both within the organisation and the wider community;
- Explores the possibilities for meaningful change and what that would look like for the organisation's core business.

### **Objectives**

- To deepen understanding within both the formal leadership group and the Development Group regarding the dynamics of prejudice, trust-building and unease with difference.
- To develop a relational understanding of the organisation's purpose and place which encompasses the principles of Equity, Diversity and Interdependence.
- To examine how these themes are relevant to workplace cultures and the work of organisations and groups in Northern Ireland.
- To give confidence to people to articulate the value of this work to colleagues and peers.

### **The Process**

Step 3 involves the formal leadership group and Development Group meeting separately to examine their own personal understandings about issues of fairness, discrimination and wider relationships. Such an exploration should be facilitated by an external partner.

Developing new relationships and understandings is not only about agreeing to work to a formal agenda. It is also about a process of listening to and sharing different histories, personal memories, fears and hopes. Such conversations are about the quality of relationships that exist between human beings and the level of trust that allows people to acknowledge and value each other's individual experiences, cultures and insights.

Change means transforming structures so that people begin to communicate in new ways. This means creating new spaces to facilitate such conversations.

## **STEP THREE**





## Questions

The questions that underpin this step are:

- How can open relationships be built within workplaces that acknowledge, rather than ignore, the potential our differences can bring to the work and wider organisational tasks? (**DIVERSITY**)
- How can we build a workplace culture where mutual regard and interdependence can flourish? (**INTERDEPENDENCE**)
- How could such actions address the needs and issues raised by those who have been marginalised or excluded from the centre of the organisation? (**EQUITY**)
- How can transformed workplaces impact on the external environment and wider community relationships in a society struggling to build a more inclusive future? (**SUSTAINABLE RELATIONSHIPS**)

As people living in the context of a contested society, our capacity to understand these themes is enhanced if we can recognise that our personal experiences and stories shape how we relate to others in the workplace.





**STEP 3 GROWING LEADERSHIP COMMITMENT AND UNDERSTANDING ABOUT EQUITY, DIVERSITY AND INTERDEPENDENCE**

**INCLUSIVE**

**Leadership**

3.1 What does inclusiveness mean for you? Where are the possibilities and limits to be inclusive within your organisation?

**Setting Direction**

3.2 Who is consulted and involved in setting the strategic direction of your organisation?  
Who is not and why?

**Internal Relationships**

3.3 Who has been promoted in the organisation?  
Who has not been promoted?  
Who has not applied for promotion?  
Are there any patterns underlying the above processes that should be taken into account?

**External Relationships**

3.4 How are the wider dynamics of prejudice, discrimination and fear in Northern Ireland reflected within your organisation, if at all?  
What structures exist to limit such behaviours?

**RELEVANT**

**Leadership**

3.5 When have you experienced being valued / not valued, being fairly / not fairly treated, feelings of belonging / being isolated both personally and at work?  
How do these experiences inform your leadership approach or how you do your work?  
What are the facts of sectarian harassment, bullying, gender and related issues in your organisation?  
How are you ensuring that such behaviours are not part of your workplace / organisational culture?

**Setting Direction**

3.6 How does the organisation grow a strategic commitment to valuing difference and building just relations, both internally and externally?  
How is this underpinned organisationally?

**Internal Relationships**

3.7 Are there reasons why different people cannot work effectively together in the organisation?  
How do people become marginalised and scapegoated in the organisation?  
What policies, structures and relationships are in place to ensure that people are treated with dignity?

**External Relations**

3.8 What does Interdependence mean in terms of your relationships with customers, clients and the wider community?  
What are the Equity issues, if any?  
What are the differences staff and the organisation need to be more aware of?

**STEP THREE**





## STEP 3 GROWING LEADERSHIP COMMITMENT AND UNDERSTANDING ABOUT EQUITY, DIVERSITY AND INTERDEPENDENCE (Contd)

### ACCOUNTABLE

#### Leadership

3.9 Are leaders rewarded and promoted on the basis of their commitment to challenging discrimination, valuing difference and building a caring working environment?

#### Setting Direction

3.10 Are consultation practices about policy and direction informed by the need for inclusiveness and seeking out marginal voices?

#### Internal Relationships

3.11 How do current practices either limit or grow trust and fairness within the organisation?

Who do you, as a formal or informal leader, usually talk to and what about?

Who do you not talk to?

#### External Relationships

3.12 What and who do you define as your local community? Who perceives you to be an inclusive and fair organisation and who does not?

## STEP THREE

### SUSTAINABLE

#### Leadership

3.13 How can the learnings generated by the formal leadership group and the Development Group be protected and grown through conversations with others?

#### Setting Direction

3.14 How can the experiences and the new insights developed in the formal leadership group and the Development Group become multiplied across the wider organisation?

#### Internal Relationships

3.15 Where are the possibilities for new conversations between the formal leadership group, the Development Group and the wider organisation on whether relationships are based on fairness, valuing difference and mutual regard?

#### External Relationships

3.16 How can the organisation use the different understandings emerging from the process to inform new conversations with external stakeholders?



### STEP 3 OUTCOMES

- There is an open relationship between the Development Group and the formal leadership group.
- The insights from the Development Group assist the formal leadership / management group understand aspects of the tacit culture of the organisation that many managers are often protected from seeing.
- People in lower grades have more confidence to meet and discuss themes and issues with managers in a new manner.
- A practical grasp of the issues exists within both the formal leadership group and the Development Group regarding 'fairness', 'negotiating differences' and 'growing interdependence' in the organisation.
- The capacity to translate the 'Equity, Diversity and Interdependence' principles into practice becomes a reality.
- A clear commitment has been made on both sides to proceed to Step 4.

### STEP THREE





## STEP 3 Practical Stories

### Making 'Equity, Diversity and Interdependence' meaningful

#### Story 1

##### **An Officer working with the Travelling Community**

The Development group members had met together for a number of days over a three month period to examine the concepts of Equity, Diversity and Interdependence and to practically link these themes to the actual work they did. Through a series of problem solving exercises people looked at practical ways in which work place and community issues could be understood through the lenses of Equity, Diversity and Interdependence.

An officer working with the Traveller Community in the area spoke about working with a group of people who had a long history of being badly treated and around whom there was a social stigma. **(Equity)**

He had difficulty at times helping his colleagues understand the different culture, values and experiences which shape members of the Travelling Community. These differences shape their needs as a community. **(Diversity)**

His experience within the Council was coloured by how he was treated by other employees-especially when he was ordered by the Council to ensure the Traveller Site was secure for other officers on grounds of Health and Safety. The demeaning manner in which other colleagues had treated him made him feel that he was not an interdependent member of the council team, some 'colleagues' saw him as 'someone apart'. **(Interdependence was denied)**

STEP THREE

#### Story 2

##### **An Officer working with people with a Disability**

A member of staff struggled for a time with how the themes of 'Equity, Diversity and Interdependence' impacted on her work practice.

There was a large amount of sentiment and good will for people with disabilities yet this officer had difficulty persuading her organisation to undertake necessary changes to the physical layout of the organisation's buildings.

In terms of equity the people she worked with had legal rights to access the facilities she wished developed. **(Equity)**

People with disabilities have different needs to those who are non-disabled. **(Diversity)**

These people, as citizens, were interdependent with all others in the town and yet, if they did not have their access to resources put right they would gradually lose their place, a place determined by their mobility and ease of access to mainstream facilities provided by the Council. **(Interdependence)**





### Story 3

#### **A Sports Officer**

Adjoining the leisure centre was a play park that served the children from the neighbouring estates that had distinctly different and opposed community loyalties. **(Diversity)**

Increasingly, as communal tensions rose, the play park was being used by the majority group diminishing access to those children from the minority group in the area. **(Equity)**

The Council had a Health and Safety responsibility for the Play Area and had set itself the task of promoting good relations between the citizens of the Borough but there was no staff presence on the play park. **(Interdependence was diminished)**

A supervisor in the leisure centre saw the battles and tensions arising between the children and their parents but felt unable to intervene because her role was only to supervise the leisure centre. As a local citizen she knew a local row was brewing; as an employee she was unable to raise the issue.

As a member of the Development Group the supervisor took the opportunity to raise her concerns in the presence of Councillors and Senior staff. **(Growing Leadership Commitment and Understanding)**

#### **Outcome of Story**

A joint initiative involving political representatives, different council staff who knew the area and the Senior Management was established to address a local conflict issue.

### Story 4

#### **A Group of Senior Managers**

The all male Senior Management team went through a number of days reflecting on the value of Equity, Diversity and Interdependence to their work and the understandings they had of Community Relations. At these days there was intense discussion about a perceived majority culture in the organisation around community background and gender.

The group also examined the extent to which promoting community understanding was understood as a core civic task and the extent to which their majority culture shaped their views.

To the credit of this team they then embarked on a number of initiatives to listen to different minority perspectives within the community and gain different staff perspectives in the organisation.

### Story 5

#### **A Development Group meets the Formal Leadership**

In a meeting between the Development Group members and the Senior Management the staff wished to raise sensitive organisational issues. These staff members revealed a high degree of anxiety prior to making their presentations and the managers a high degree of surprise that staff felt this way.





The following actions were agreed:

- The substantive issues raised were tabled for the next Management meeting and a procedure established for feeding back the actions taken.
- The Senior Managers began a new discussion with the Development Group about why staff felt uncertain in such 'powerful' company and how this culture could be dissolved.
- Staff spoke about the 'rational-political' axis managers worked on, not hearing or acknowledging that their jobs often demanded that they worked in the 'emotional' area also. ( See 3.2, Core Concept 5 ) Further discussions on this were agreed.

  
STEP THREE





## STEP 4 IDENTIFYING ISSUES

Many organisations in Northern Ireland have evolved structures, cultures and ways of working which deny the wider political context and its impact on relationships. Arguably, in the absence of alternative models, this has been the most logical defence mechanism against the chaos and pain in the wider community. The only time when issues were acknowledged was through responding to fair employment legislation or through reacting to crises. As a rule, the mainstream business of many organisations has been kept well away from the divisions.

Identifying the issues is therefore more than a technical process - it asks people to take risks with one another and surface experiences and feelings which they have, to date, restricted to their close personal relationships. It is these issues which ground the process in the reality of organisational life and sets out the change agenda. Through the process, people begin to learn together rather than apart.

'You have paid for the whole of me over the last thirty years, but you only got my hands'.  
(A tradesman to managers upon his retirement)

### Objectives

To conduct a Scoping Study within the organisation. This will:

- Develop a preliminary base-line to enable the organisation to regularly assess its own performance.
- Begin new conversations within the organisation across lines of difference.
- Broaden the ownership of the process through inviting people to participate in a series of discussion groups and individual interviews.
- Present multiple perspectives on the culture and working practices of the organisation.
- Make visible elements of the organisational culture that are collectively known but never spoken about.
- To begin identifying the needs, concerns and perceptions of key stakeholders towards developing a realistic programme of work.

### The Process of a Scoping Study

In our experience, this step requires a level of understanding and commitment from the formal and the informal leadership (the Development Group). The process inevitably raises issues that will be critical to understanding the organisation's culture and practice. This requires a leadership that listens rather than reacts, that is prepared to learn from criticism rather than act defensively. Many organisations wish to rush into this stage in their desire for 'evidence' to justify their involvement in this process. Our experience is that it is better to first grow people's capacity to think about these issues in a new manner within the Development Group and formal leadership; this then allows the organisation to view any problems that emerge through the perspective of these new relationships and understandings.

The process of a Scoping Study is an opportunity for the Development Group to map the organisation, to examine the range of relationships within which people work and deliver services and explore how the themes of Equity, Diversity and Interdependence can improve the organisation's purpose.

## STEP FOUR





The Scoping Study is undertaken by the external partner on a confidential basis. It is made up of a number of elements:

### **Group Meetings with all staff willing to attend**

- Meetings with staff to introduce the ideas and the project.
- An opportunity to unpack the themes with staff and gauge how they might be used to good effect in workplace situations.
- An opportunity to invite the staff to speak about the local context they are placed in and assess how they have to take account of the external interests and stakeholders.

### **Random Interviews**

- Interviews with approximately 10% of the staff weighted for gender, location, grade and minority voice and also including:
  - Board Members
  - All Senior Managers
  - Trade Union Representatives
  - External Stakeholder Voices

STEP FOUR

### **A Staff / Board Survey**

A short survey exploring:

- How staff experience their working relationships; ie: whether they feel valued and respected for their different experiences by colleagues and managers;
- Existing policies and working practices dealing with discrimination and harassment and whether these really work;
- How staff understand the values of the organisation within a wider political context;
- Leadership capacity;
- The quality of relationships with the wider community; e.g. clients, customers, local communities;
- How the organisation is perceived within the wider community.



**Issues** that might surface through this step include:

- Grant-giving policies that are not challenging community segregation.
- People with physical disabilities being paid a different rate to non-disabled employees.
- Staff in a Council working with marginalised groups who are themselves marginalised by council structures.
- Within deeply majoritarian cultures, the isolation and exclusion of the minority.
- Poor management practices that disempower employees giving them no ownership of or connection to their work.
- Patterns of bullying and harassment.
- People with learning disabilities in employment being humiliated by staff and/or customers.
- Maintenance or deterioration of community segregation and division through the unquestioned delivery of services.

Positive **outcomes** that might surface include:

- Managers recognising the commitment and loyalty of staff, previously unacknowledged.
- Staff members having talents and skills that could be of use to the organisation, if required, e.g. language skills, minority ethnic group knowledge, First Aid experience.
- Ideas that, if incorporated into organisational practice, could benefit the organisation.
- Staff willingness to support the organisation in standing firmly against bullying and harassment.

The following critical questions are a useful indicator in assessing whether both the informal and formal leadership groups are committed to and involved in the Scoping Study process.





## STEP 4 IDENTIFYING ISSUES

### INCLUSIVE

#### Leadership

4.1 Are both formal and informal leaders actively involved and supporting this phase?

#### Setting Direction

4.2 Have the members of the Development Group the confidence and willingness to speak together about contentious issues?  
Is there a good working relationship established with the formal leadership group?

#### Internal Relationships

4.3 Are all the different stakeholders included in the Development Group at this time?  
Has the group had an opportunity to speak together and voice very different experiences?

#### External Relationships

4.4 Should external stakeholders such as communities, clients and service users be involved at this stage? If not, when would such an engagement be valuable?

## STEP FOUR

### RELEVANT

#### Leadership

4.5 Has the Development Group clearly articulated the purpose and objectives of this phase and gained the commitment of the formal leadership to engage with the findings of the Scoping Study?

#### Setting Direction

4.6 How will the issues raised feed into, if relevant, mainstream strategy development?  
What channels are open to the Development Group for thinking about this?

#### Internal Relationships

4.7 How will this Scoping Study be made relevant to people's priorities and the context in which they work?

#### External Relationships

4.8 How will external issues in the wider community, political, policy and economic environment feed into the Scoping Study process?



**STEP 4 IDENTIFYING ISSUES (cont.)**

**ACCOUNTABLE**

**Leadership**

4.9 How will the Development Group be involved in this process and how will it communicate the findings of the Scoping Study to the different internal stakeholder groups?

**Setting Direction**

4.10 What is the responsibility of the Development Group if contentious issues are raised by the Scoping Study?

In the event of some issues not being acted upon what is the role of the external partner?

**Internal Relationships**

4.11 What methods will be used to allow people with different perspectives, community backgrounds and responsibilities to freely articulate their interests and concerns?

How will confidentiality be assured and maintained within the Development Group?

**External Relationships**

4.12 At what stage will the outcomes of the Scoping Study and the actions taken be made available to external stakeholders?

**STEP FOUR**

**SUSTAINABLE**

**Leadership**

4.13 How will the Development Group listen to contentious issues being raised? How will it engage in an open discussion with the formal leadership group about such issues?

**Setting Direction**

4.14 How will all the issues raised be prioritised and become the basis of a work plan for the wider process?

**Internal Relationships**

4.15 Who will be involved in the prioritisation and subsequent planning and what will be the continuing task of the Development Group and the various stakeholders they represent in this process?

**External Relationships**

4.16 In building relationships with external stakeholders what learning will be shared?

What new stakeholders will be recognised and communicated with?





## STEP 4 OUTCOMES

### Overall Outcomes

- An audit of current structures, policies, roles and responsibilities and initiatives, highlighting how policy becomes translated into practice.
- A base-line enabling the organisation to regularly assess its own performance.
- A document acknowledging:
  - those working relationships, policies and practices that the organisation should value;
  - those working practices that need further attention.
- A new conversation beginning to take place between staff across lines of difference, contributing to wider ownership of the process.
- A clear commitment has been made to proceed to Step 5.

STEP FOUR



## STEP 4 A Practical Story

### Scoping Study

A Scoping Study of a large voluntary organisation had been undertaken by the external partner. The draft report identified many elements of good practice and indicated there was a high commitment to the organisation. Many staff experienced a wish to continue working there.

A number of issues that needed attention within the organisation around the themes of Equity, Diversity and Interdependence were named. The study also identified opportunities to link the organisation to local community groups.

Some issues were sensitive. Staff from different minority traditions identified where they were made to feel uncomfortable. They said there was little obvious management sensitivity to these issues.

Reference was made to some events of an intimidatory nature that, viewed across the organisation, actually formed a pattern. This pattern was not seen by individual managers until highlighted in the Scoping Study.

The study highlighted certain management practices that did not appear to be to a uniform standard across the organisation.

There was a need to address the organisation's relationship with the residents of the local area.

The draft was intended for discussion and the final proposals for action were to be owned by the organisation.

The Development Group established a Working Group to go through the report and develop an edited report that would be discussed further at the next meeting. The Working Group had members from each of the constituent elements of the Development Group - Staff, Unions, Middle Managers, Senior Managers and Board Members.

## STEP FOUR





## STEP 5 GROWING COMMITMENT AND UNDERSTANDING ACROSS THE WIDER ORGANISATION

Growing commitment and understanding across the wider organisation is about expanding the conversations, training and commitment beyond the initial small groups to the wider organisation. There are many examples of the first pioneers of change becoming isolated from their colleagues through what often verges on an evangelical zeal with the process.

It is important too that this step is not conducted in a technical manner but builds on the relational way of working that the Development Group and formal leadership group now understand. It is not just a matter of replicating models developed within those two groups, but growing the commitment of the wider organisation in ways that are appropriate for the different situations people face.

### Objectives

- To support the members of the formal leadership group and Development Group initiate processes and programmes of work within the organisation.
- To enable people beyond the formal leadership and Development Group gain a relational understanding of their work in the organisation and of their place within it.
- To create a range of capacity building opportunities for staff and internal and external stakeholders. This would be developed with reference to Step 4.

A graphic for 'STEP FIVE' featuring a dark red curved line above the text 'STEP FIVE' in a bold, sans-serif font.

## STEP FIVE

### The Process

This step assumes a Scoping Study has been completed on behalf of the Development Group and the main findings of this report have been worked into a set of proposals to present to the formal leadership.

This step is about ensuring that there continues to be a level of commitment with the senior and middle managers to take the process out into the wider organisation. This step is less about implementation than about building the necessary architecture to ensure that at Step 6 there is the support and understanding at all levels of the organisation to model and develop new working practices.

At this point, membership of the Development Group might change as new people are included in the process.







**STEP 5 GROWING COMMITMENT AND UNDERSTANDING  
ACROSS THE WIDER ORGANISATION**

**INCLUSIVE**

**Leadership**

5.1 Out of the Scoping Study, what are the specific themes and issues regarding inclusiveness that need to be addressed at this moment in your organisation?

**Setting Direction**

5.2 Who are the different people who can take these themes forward?  
How might they begin to work together?  
Who can invite them and hold them accountable?

**Internal Relationships**

5.3 In terms of the knowledge available to the Development Group with regard to the tasks in hand, who else needs to be included?  
Who or which group(s) can set the tone for this more inclusive approach?

**External Relationships**

5.4 Has the organisation links with significant people in the wider community who could help grow commitment among staff, board and community?

**RELEVANT**

**Leadership**

5.5 Is there an agreed priority for this work from the formal leadership?  
Has the formal leadership demonstrated a willingness to commit time to this process?

**Setting Direction**

5.6 In what manner have the Scoping Study issues been acknowledged and accommodated within the formal leadership, Development Group and internal stakeholders?

**Internal Relationships**

5.7 Are members of the Development Group and the formal leadership group agreed that addressing the issues raised in the Scoping Study will improve internal relationships?  
Are there possibilities for specific learning / training events with diverse groups of staff to widen commitment?

**External Relationships**

5.8 Has the organisation engaged its external stakeholders on how the issues raised through the Scoping Study might improve services delivered and the quality of life?

**STEP FIVE**





## STEP 5 GROWING COMMITMENT AND UNDERSTANDING ACROSS THE WIDER ORGANISATION (Contd)

### ACCOUNTABLE

#### Leadership

5.9 Is there scope for extending membership of the Development Group or rotating the membership in order to extend the scope and reach of the process?

#### Setting Direction

5.10 How are the Development Group members nominated and how long do they serve?  
In what manner are they representative, trusted and free to move across the whole organisation?

#### Internal Relationships

5.11 What are the specific items that have been addressed internally since the programme started?  
How will the group be able to ensure its voice is heard and responded to?

#### External Relationships

5.12 Structurally, how is the organisation currently addressing issues of equity, diversity and segregation within the communities it serves?  
How is the organisation communicating progress on these issues using these structures?

## STEP FIVE

### SUSTAINABLE

#### Leadership

5.13 Is the Development Group open to making some distinct recommendations to the formal leadership group out of the Scoping Study?

#### Setting Direction

5.14 What immediate, medium and long term priorities have been agreed?  
What are the 'quick wins'?  
Is there a process to regularly note and communicate progress?  
Is there a structure for resolving any difficulties that may emerge?

#### Internal Relationships

5.15 Are middle managers and line managers involved in the planning and prioritisation of issues emerging from the Scoping Study?  
How will they be involved in the implementation?  
Are those with personnel / human resource responsibilities 'on board'?

#### External Relationships

5.16 In what manner have the issues raised been acknowledged by the external stakeholders?  
Are different staff and board members actively engaging external stakeholders in this process?





## STEP 5 OUTCOMES

### Overall Outcomes

- There are clear tasks for the formal leadership, the Board, staff, trade unions, middle managers and other key stakeholders with short, medium and long term priorities. These are integrated within the core business and value base of the organisation.
- There are structures for holding people accountable and for communicating progress.
- The organisation will be clear about the costs of not addressing the themes of 'Equity, Diversity and Interdependence'.
- The organisation will have allocated the appropriate resources and staff to deepen the quality of relationships within the workplace.
- There will be a plan for enhancing the quality of services to the communities the organisation serves.
- The relationships between the organisation and local communities will be enhanced.
- The organisation will have confirmed a diverse Development Group membership for the next step.
- A range of capacity building initiatives with different members of staff have been completed.
- A clear commitment has been made to proceed to Step 6.

## STEP FIVE





## STEP 5 A Practical Story

### Recognition of Minority Voices in an Organisation

In a large organisation the sensitive issues laid out and requiring attention within the Scoping Study report were eventually acknowledged and agreed as action point proposals.

It was not that everyone identified with the examples given in the report. Initially some said they did not recognise their organisation.

Some members of the Development Group did identify with the report. They felt that their struggle for a place in the organisation "was finally named and recognised" and they spoke personally about certain experiences and others listened.

Because of the trust and open dialogue the Development Group members had experienced together those with a more secure base in the organisation "heard things for the first time and were surprised, yet believed what they were being told".

In due course a series of proposals were agreed to progress the Scoping Study. These were taken to the Senior Management for their agreement and support.

Three members of the Development Group presented this to the Senior Management, a 'first' in the organisation. With some fine tuning the broad raft of Development Group proposals were approved.

Alongside these 'Proposals for Action' Senior Managers, Board Members, Managers, Unions, Departments and Staff were all given action points that they were to progress.

These actions covered:

- Working Practices.
- Organisational ways of working requiring overhaul.
- Working relationships.
- Community relationships.
- The manner in which the organisation promoted itself locally and how this could be changed / developed.
- The contribution of staff to the above process.

### Agreements

It was agreed that regular meetings between the Development Group and Senior Staff would be held.

Some idea of the process and a timescale sensitive to the wider political situation was agreed.

There was a realisation that it takes time to build relationships.

A series of 'quick achievable results' was agreed to give people the confidence to engage further.

It was agreed to hold staff discussion groups, mixing people from different departments and grades, to open up discussions on issues raised within the Scoping Study report.

STEP FIVE





## **STEP 6      EXPERIMENTING   AND   MODELLING   NEW   WORKING PRACTICES**

This is about experimenting with ways of implementing the vision and addressing the issues raised. This requires building support and understanding across the organisation, piloting new ways of working, experimenting with new policies, structures and support mechanisms. It is about creating a new culture of learning where differing opinions are articulated, criticisms acknowledged and the emotional and intellectual challenges of change heard.

### **Objectives**

- To encourage the management or leadership to be open to working practically across grades and levels, enabling a new conversation between staff members.
- To ensure that existing policies, structures and culture are working with the process and not against it.
- To encourage and develop new models for working together across the organisation.
- To use the Development Group as a mechanism to gather and reflect on the learning gained from the different initiatives across the organisation.
- To promote a conscious working together to build an equitable, diverse and interdependent organisation.
- To work in a new manner with existing external stakeholders and be open to hearing and acknowledging new voices.

## **STEP SIX**

### **The Process**

This step is about working on the issues raised through the Scoping Study.

This step implies that the programme of change is a deep one, not something created for publicity reasons or a quick fix.

It assumes that there is a sustained commitment to create a relational way of working as a mainstream reality.

The staff involved have been empowered to initiate practice and it is legitimate for them, in trying out new approaches in good faith, to take risks and make mistakes.

All actions are being reflected on and learned from.





## STEP 6 EXPERIMENTING AND MODELLING NEW WORKING PRACTICES

### INCLUSIVE

#### Leadership

6.1 Are those who carry ultimate responsibility directly and supportively engaged?

#### Setting Direction

6.2 Do those who are developing new practices and thinking feel supported by their management?

#### Internal relationships

6.3 Is this step characterised by staff working on different models of practice being seen to be integral, not apart from, the organisation?

#### External relationships

6.4 Are external partners considered to be core to the current agenda?

### RELEVANT

#### Leadership

6.5 How are the learnings and reflections from these new practices informing a generative leadership model? (see 3.2, Core Concept 1)

#### Setting Direction

6.6 How is this learning being integrated into the strategic direction of the organisation?

#### Internal relationships

6.7 Can the actions be directly linked to the vision statement at the beginning of this Framework document?

#### External relationships

6.8 How is the organisation connecting the learning outcomes to wider social, political and economic context?

## STEP SIX





**STEP 6**      **EXPERIMENTING AND MODELLING NEW WORKING PRACTICES (Contd)**

**ACCOUNTABLE**

**Leadership**

6.9 How are the informal and formal leadership connecting the learning being generated to their roles and responsibilities?

**Setting Direction**

6.10 How are the learnings impacting on the direction of the organisation and its corporate and business strategies?

**Internal relationships**

6.11 How is the wider organisational membership brought into these new practices and understandings?

**External relationships**

6.12 In being open and transparent, how are the external stakeholders communicated with and involved in these new understandings and practices?

**SUSTAINABLE**

**Leadership**

6.13 Is the formal leadership committed to the multiplication of new practices and sustaining them into the foreseeable future into Step 7?

**Setting Direction**

6.14 Is the formal leadership actively encouraging staff to apply the relevant learnings in an appropriate manner in their own context?

**Internal relationships**

6.15 What are the factors that grow and limit internal relationships around the 'equity, diversity and interdependence' process and what are the constraints?

**External relationships**

6.16 How does the organisation now understand its relational place and purpose with reference to its external stakeholders and the changing political context?

**STEP SIX**





## STEP 6 OUTCOMES

### Overall Outcomes

- New models of working practices and relationships exist and are owned by the formal leadership.
- There is a preparedness by the formal and informal leadership to model new behaviours and relationships.
- There exists a partnership approach to resolving problems.
- There is a willingness to develop a more open learning culture across grades within the organisation.
- There is a programme of work with external stakeholders, including an acknowledgement of new stakeholders with an interest in the organisation.
- The organisation uses the diversity of interests and skills of people to build community related initiatives, resolve conflicts and promote the work of the organisation as a learning organisation.
- A clear commitment has been made to proceed to Step 7.

STEP SIX





**STEP 6      A Practical Story****New External Relationships**

A factory in a small Protestant town has had a tradition of flying the Union flag every July. The flag is raised at an informal ceremony by a group of workers on an unofficial flagpole that sits on the factory grounds. After receiving a complaint the Fair Employment Commission (FEC) advised the company that to fly the flag in July would be considered sectarian. The company informed the shop stewards of the FEC's advice and their intention to remove the flag pole. After a few days the shop stewards reported back to the management that "the village won't like it" and "if flag doesn't go up, the factory comes down".

Following Counteract's intervention and the setting up of an equality committee to discuss the issue, it became increasingly clear that regardless of what compromise was arrived at, external pressures / threats from the local community would prevent anyone putting their name to any agreement. It was agreed that contact would be made through certain 'key workers' to a range of community based organisations and to invite them into the dialogue.

Members of a local heritage group, which was representative of other religious and cultural organisations, were invited to assist in putting on an open day with the factory about the history of the factory and the industry in general. This open day coincided with the launch of new uniforms for staff and the unveiling of an official company flag pole at the front of the factory. It was agreed that the Union flag would fly from dawn to dusk on six agreed days of the year. As the factory was closed over the holiday fortnight no flag would be flown on the twelfth of July, however it would be flown on the first of July in commemoration of the Battle of the Somme.

**Outcomes of this story:**

- The problem initiated a novel conflict resolution approach.
- There was pro-active engagement with external stakeholders.
- More formal relations with the local community were established.
- A compromise on the flying of the Union flag on six agreed days was established by Catholic and Protestant workers.

STEP SIX





## STEP 7 IMPLEMENTING NEW MODELS INTO MAINSTREAM STRUCTURES AND RELATIONSHIPS

This step is about sustainability and maintaining the critical tension between the current realities and the organisational vision of what could be. This is about recognising that engaging with the principles of 'Equity, Diversity and Interdependence' is not a one-off initiative but about mainstreaming the capacity of the organisation and its staff to learn and innovate in an increasingly complex and diverse world.

### Objectives

- To be aware of patterns of exclusion and inclusion within the organisation and with external stakeholders. To ensure that the organisational structures and culture do not marginalise or exclude those who are different. To welcome the dissenters and those who offer experiences that go against the majority.
- To be aware of the diverse needs and contexts within the organisation and with the wider community, ensuring that new initiatives and programmes engage with the 'confusing complexity of people, families, communities and livelihoods'.<sup>37</sup>
- To ensure that this process is relevant to, and begins with, the differences that exist. To be relevant is to deal with the current realities, unpack those issues that are identified and grow the capacity and understanding of all about the possibility of working to a shared vision. It is about making sense in different ways to different people.



<sup>37</sup> Boyle, D., The Tyranny of Numbers - Why Counting Can't Make Us Happy, Harper Collins Publisher, p.40., 2000.





**STEP 7 IMPLEMENTING NEW MODELS INTO MAINSTREAM STRUCTURES AND RELATIONSHIPS**

**INCLUSIVE**

**Leadership**

7.1 Is there a generative leadership which actively creates new environments, generates new options and opportunities for growth?

**Setting Direction**

7.2 Are people at different levels contributing and participating in discussions on the strategic direction of the organisation?

**Internal Relationships**

7.3 Are relationships open and trusting?  
Are there critical exchanges between staff and the executive leadership that are offered constructively and received openly?

**External Relationships**

7.4 Is there mutual benefit to the work of the organisation and its external stakeholders through an inclusive approach?

**STEP SEVEN**

**RELEVANT**

**Leadership**

7.5 Is there a commitment from the leadership to create a learning environment where training and educational opportunities are not limited to job specific criteria?

**Setting Direction**

7.6 Is there a sustained commitment to continually examining that all areas of work are contributing to the promotion of equity, valuing of difference and the building of trust?

**Internal Relationships**

7.7 Is the manner in which people treat one another and carry out their work consistent with the promotion of equity, valuing of difference and the building of trust?

**External Relationships**

7.8 Is the purpose of the organisation now defined through a dialogue between the organisation and its external stakeholders?





## STEP 7 IMPLEMENTING NEW MODELS INTO MAINSTREAM STRUCTURES AND RELATIONSHIPS (Contd)

### ACCOUNTABLE

#### Leadership

- 7.9 Is the organisation's leadership striving to reflect the wider communal diversity?  
Is the leadership modelling how diverse peoples and traditions contribute to the organisation's purpose in a plural society?

#### Setting Direction

- 7.10 Is the organisation's strategic plan promoting the building of trust, fair treatment and openness to difference as being core to its business?

#### Internal Relationships

- 7.11 Are staff relationships characterised by open relationships and an absence of a blame culture?

#### External Relationships

- 7.11 Are the talents of staff and the executive regularly offered to contribute to the vitality and life of external communities?

### SUSTAINABLE

#### Leadership

- 7.12 Has the leadership the courage to learn in broader relationships?  
Is it being seen to do so and, in so doing, does it challenge exclusive behaviour, intimidation, fears and ignorance?

#### Setting Direction

- 7.14 Do working practices assume that staff and the executive leadership have a work, community and life balance?

#### Internal Relationships

- 7.15 In order for the organisation to respond to changing environments and generate new possibilities, are staff encouraged to grow the discretionary element of their work?<sup>38</sup>

#### External Relationships

- 7.16 Does the organisation evidence a belief that societal relationships based on trust are more sustainable than relationships characterised by silence and conflict?

## STEP SEVEN

<sup>38</sup> Kakabadse, A.P., Kakabadse, N., Essence of Leadership, International Thomson Business, London. 1999.





## 8 AUDITING THE PROCESS

It is vital that an organisation audits progress in implementing its 'Equity, Diversity and Interdependence' vision. This requires being clear about:

- An organisation's **current reality** in terms of achievements, dilemmas, and community/social context.
- An organisation's **vision**.

There is no definite 'Equity, Diversity and Interdependence' state where an organisation can breathe a sigh of relief and say 'we've made it'. These three principles measure an organisation's capacity to deal with issues of difference, fairness and relationships within a continually changing context. The answers that might have been appropriate five years ago might no longer be appropriate today.

The following are some questions an organisation might use to assess whether its commitment to the principles of 'Equity, Diversity and Interdependence' has made any difference to the quality of internal relationships and relationships with key external stakeholders. How the organisation answers these questions must be shaped by the measures of inclusiveness, relevance, accountability and sustainability.



## AUDITING QUESTIONS

### EQUITY

- Is there an alignment between the formal, informal and tacit cultures that ensures that there is an absence of fear and humiliation within and 'outwith' the organisation?
- Do ideas come from different people at different levels and from different areas of work?
- Are the voices and experiences of those who were previously marginal now acknowledged in decision making?
- Is the organisation community and client centred, concerned with eliminating discrimination and committed to treating people fairly?
- Is the organisation committed to wider sustainability issues?

### DIVERSITY

- Do people feel valued and worthy, enabling them to contribute more fully to the organisation?
- Do people feel free to experiment, take risks and be open about mistakes, achievements and results?
- Is the organisation striving towards a fair representation of men and women and wider diversity at all levels?

### INTERDEPENDENCE

- Does the organisation hold a relational understanding of its place and purpose with effective communication systems across all levels and teams?
- Does the organisation ensure empowerment and accountability at all levels, valuing the different perspectives formed by gender, ethnic, racial, political, age, class and sexual orientation?
- Is the organisation striving towards ensuring a balanced work, home and community life?
- Does the organisation have the capacity to respond to changing environments and to generate new possibilities?

On the following page we have gathered the different elements of the Framework together.





## Returning to the EDI Framework

INFLUENCES and LEARNING distilled from COMMUNITY RELATIONS PRACTICE in NORTHERN IRELAND

A Learning Society

### PRINCIPLES of Community Relations

- Equity
- Diversity
- Interdependence

INFLUENCES from BEST PRACTICE in ORGANISATIONAL LEARNING and CHANGE

A Learning Organisation

### Concepts about Organisational Learning and Change

- Adaptive & Generative Learning
- Tacit Cultures
- Triple Loop Learning Cycles
- Using Metaphors
- Emotional, Political and Rational Dimensions
- Current Realities and Future Vision
- Partisan, Neutral, Pigeon Holing and Diverse
- Cultures

### THE EDI FRAMEWORK 10 Distinctive Characteristics of the Model

MEASURES FOR CHANGING

AREAS FOR CHANGING

STEPS FOR CHANGING

Dialogue Structures  
CRITICAL QUESTIONS

AUDITING  
PROGRESS

AUDITING  
PROGRESS

DIAGRAM 20





### What does this mean for an organisation on a Monday morning?

- A change in its focus and a re-examination of its values and purpose.
- Management and staff talking to someone they have never spoken with before.
- A critical look at how management and staff get the job done and allocate existing resources.
- How the organisation is structured.
- How we speak with and listen to people.

Now  
it's your  
turn to create  
some **events** that bring  
people from very different  
backgrounds and positions into a  
new conversation.

It might be possible to **pattern** these  
events and grow new habits regarding dealing  
with the themes of fairness, valuing difference  
and mutual respect.

These patterns might begin informing existing  
**structures** in your organisation and encourage them  
towards examining whether they maintain separation or  
promote greater interdependence.

This Framework is about assisting forward looking  
organisations continually revisit their values and explore  
current **assumptions** about their role in a changing community  
and political context.

\*

\* Model adapted from Senge. P., et al, **Schools that Learn**, Nicholas Brealey Publishing, 2000, p.412.







## DIAGRAMS

		PAGE NO
DIAGRAM 1	The Dynamics of Separation, Avoidance and Politeness	15
DIAGRAM 2	Costs to Organisations	17
DIAGRAM 3	The EDI Framework	20
DIAGRAM 4	The Iceberg Facing Organisations	26
DIAGRAM 5	The Triple Loop Learning Cycle (adapted from Peter Senge)	27
DIAGRAM 6	The Political, Emotional & Rational Axes	30
DIAGRAM 7	The creative tension between vision and current realities	31
DIAGRAM 8	Partisan Culture	32
DIAGRAM 9	Neutral Culture	32
DIAGRAM 10	Pigeon-Holing Culture	33
DIAGRAM 11	Diverse Culture	33
DIAGRAM 12	The Backdrop of Silences and Fears	35
DIAGRAM 13	The Three Building Blocks	42
DIAGRAM 14	The Three Building Blocks and the Seven Steps of the EDI Framework	49
DIAGRAM 15	The Four Dialogue Structures	50
DIAGRAM 16	Seeing 'them' - not being seen by 'them' - The experience of the minority	51
DIAGRAM 17	Informal & Formal Space	53
DIAGRAM 18	Sustaining the Tension between the Informal and Formal Spaces	54
DIAGRAM 19	The Dialogue between the Development Group and The Formal Structures	64
DIAGRAM 20	Returning to the EDI Framework	102



# APPENDICES

**Appendix A - About the Partners**

**Appendix B - Glossary of Abbreviations**

**Appendix C - Ladder of Participation  
(Consulting the Black and Minority Ethnic  
Communities)**

**Appendix D - The Development Group Model**





## APPENDIX A

### ABOUT THE PARTNERS

#### FUTURE WAYS

The Future Ways Programme is a charitably supported initiative based in the University of Ulster that seeks to bridge the gap between the long history of conflict handling work in the community and voluntary sectors and the relative absence of any practical developments within a large number of institutions and organisations in Northern Ireland. Currently its work includes:

- Developing and delivering training and innovative learning courses on issues of diversity, trust building and equity with elected councillors, social workers, teachers, community workers and public bodies.
- Helping to define and implement appropriate community relations policies and practice within a number of different institutional contexts - often working in partnership with Counteract, the Workers Education Association, the Mediation Network for Northern Ireland, the Rural Community Network, the Corrymeela Community and the Northern Ireland Community Relations Training and Learning Consortium.
- Publishing materials and texts arising from the practical programme of work.
- Developing a local governance 'Civic Leadership' Programme with the Western Routes Initiative, linked to five local councils in Tyrone and Fermanagh.

Contact:      **Loretto Blackwood (Secretary)**      **028 70 32 4550**  
                    **Karin Eyben**                                      **028 70 32 4620**  
                    **Libby Keys**                                         **028 867 65806**  
                    **Duncan Morrow**                                **028 90 36 6486**  
                    **Derick Wilson**                                    **028 70 32 4550**

#### COUNTERACT

Counteract, an anti-intimidation unit, was formed in 1990 with the sponsorship and support of the Irish Congress of Trade Unions. Its purpose is to develop actions, policies and strategies that alleviate the incidence of sectarianism and intimidation in the workplace and the wider community. It also undertakes research into workplace intimidation and trade union and employer responses to it.

Since its inception, Counteract has provided a very effective 'fire-fighting service' for a large number of organisations across the public, private and community/voluntary sectors. However, while this facility provided an immediate response to the short term needs of these organisations, it did not offer a longer-term solution to their problems. Counteract has recognised the need to facilitate the embedding of an internal capacity within organisations to develop and sustain an anti-discriminatory / anti-intimidation ethos and move towards the promotion of equity and the acceptance of diversity.

Contact:      **Stephen Bloomer**                                      **028 90 237023**  
                    **Flora Brand**  
                    **Paul Burke**  
                    **Joe Law**  
                    **Noreen Moore (Secretary)**  
                    **Stevie Nolan**  
                    **Billy Robinson**





## APPENDIX B

### GLOSSARY of ABBREVIATIONS

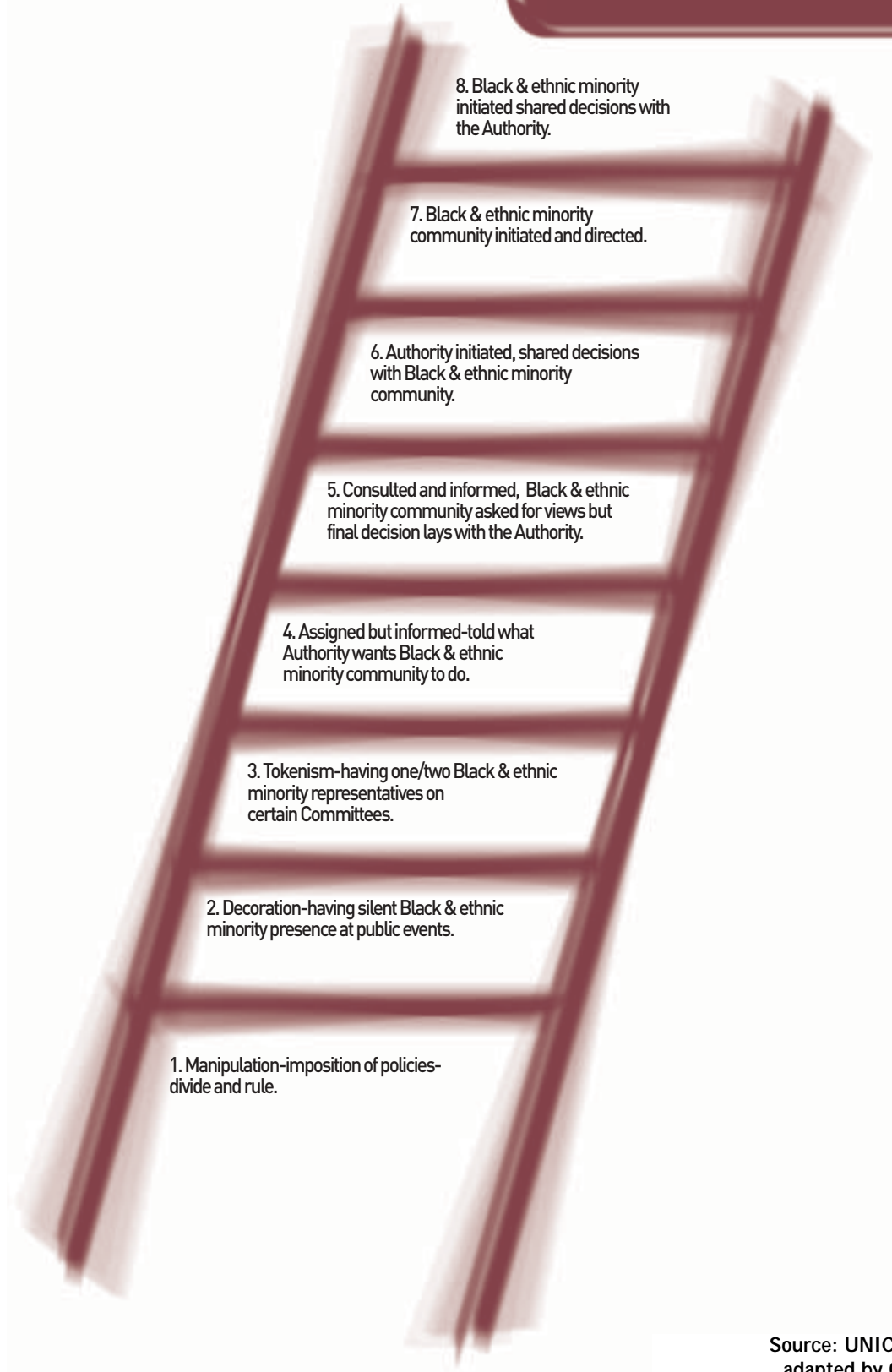
<b>CBI</b>	Confederation of British Industry
<b>CRU</b>	Community Relations Unit
<b>CREDI</b>	Coleraine Relationships in Equity, Diversity and Interdependence
<b>DG</b>	Development Group
<b>DFP</b>	Department of Finance and Personnel
<b>DHSSPS</b>	Department of Health and Social Services and Public Safety
<b>EDI</b>	Equity, Diversity and Interdependence
<b>EDIF</b>	Equity, Diversity and Interdependence Framework
<b>EUSSPPR</b>	European Union Special Support Programme for Peace and Reconciliation
<b>FEC</b>	Fair Employment Commission (now incorporated within the Equality Commission)
<b>G7 Group</b>	G7 Group (now G8 Group) formed between seven business and trade union umbrella groups in 1996, coordinated by CBI(NI) and ICTU
<b>ICTU</b>	Irish Congress of Trade Unions
<b>IFI</b>	International Fund for Ireland
<b>NICRC</b>	Northern Ireland Community Relations Council
<b>OFM/DFM</b>	Office of the First Minister and Deputy First Minister
<b>OSDC</b>	Organisation and Social Development Consultants
<b>NIPfG</b>	Northern Ireland Programme for Government
<b>REDI</b>	Relationships in Equity, Diversity and Interdependence (Newry & Mourne)
<b>SMT</b>	Senior Management Team
<b>SOL</b>	Society for Organisation Learning, Cambridge, Massachusetts
<b>UCT</b>	Understanding Conflict Trust





## APPENDIX C

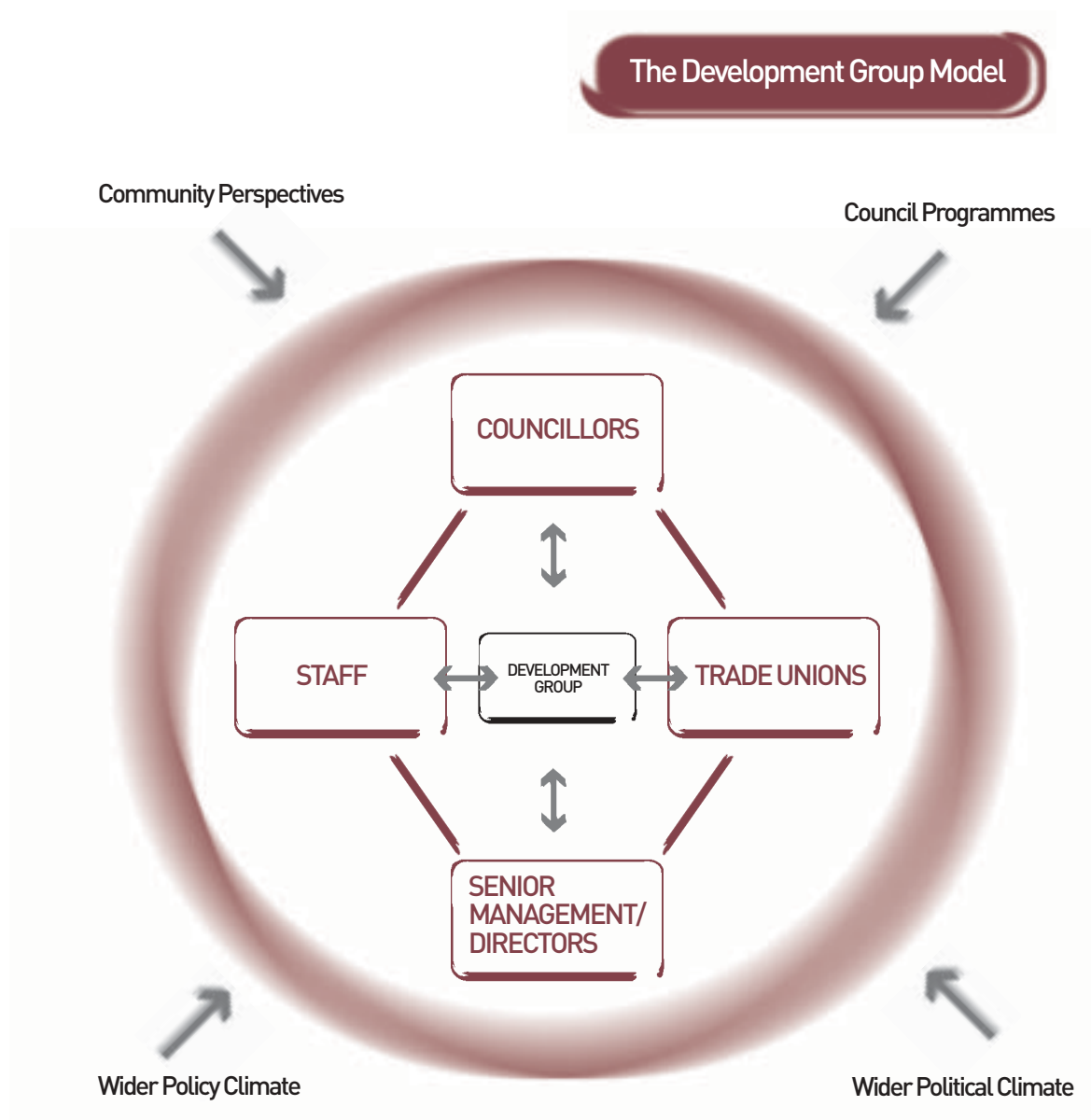
### Ladder of Participation



Source: UNICEF (1992)  
adapted by OSDC Ltd.

## APPENDIX D

### The Development Group Model (Applied to a District Council)



Community Relations work presumes that it is possible to develop new, more interdependent relationships across the different traditions in Northern Ireland and beyond. If trust is to grow in Northern Ireland, we need to generate new patterns and habits of behaviour.



The Development Group model has been used with several elected local Councils that have been open to the challenges of civic leadership, promoting social cohesion and community understanding locally.

In such a structure people experience the challenges of interdependence, hearing diverse experiences and treating one another fairly.

At the heart of the Development Group are a number of elements:

- **A Space** for people from different stakeholder groups in the council to be together in a new manner;
- **An Opportunity** for people to meet together as people living and working locally. This means democratically elected representatives as well as directors, staff and trade union members;
- **A Time** for all members to reflect on their civic responsibilities.

The model allows the organisation / council, if it wishes, to become a learning organisation, an organisation where sensitivity to staff needs and local opportunities are always to the fore.

In the structured space of the Development Group:

The opportunities for learning and training offered to each group are meant to nourish the dialogue between the different strands within the Development Group.

The presence of all parties together is designed so that all are responsible with and for one another. This structure actively restricts movements to isolate or scapegoat certain groups and members. Such a structure challenges any blame culture that may exist in the organisation.

- The presence of councillors gives space for civic and cross-party concerns to be aired.
- The presence of staff keeps everyone open to the needs of individual staff.
- The presence of Directors recognises the importance of policies and structures being continually reflected on in the light of daily practice.
- The representative nature of the Trade Union presence acknowledges that staff also have structural access to ensuring fair and equitable treatment.
- The presence of all parties means they are all committed to assist the council / organisation effectively carry out its civic responsibilities.



The function of the Development Group is about:

- **Reporting** on progress around Equity, Diversity and Interdependence;
- **Reflecting** on progress;
- **Promoting** innovatory programmes on Equity, Diversity and Interdependence;
- **Learning** from any programmes initiated;
- **Making challenges** to the whole organisation about promoting Equity, Diversity and Interdependence;
- **Connecting** all aspects of the organisation to the Equity, Diversity and Interdependence programme.

It is **not** about infringing on the appropriate accountability lines that exist in other official forums such as between:

- Councillors and Senior Management.
- Senior Management, Line Managers and Staff.
- Senior Management and Trade Unions.

## **Structure**

This group, through its membership and structure, is a contrast to all committee structures and complements them.

In the council it is initially important that the group is chaired by the external partner. Once ownership of the project grows it is appropriate that a staff member, who is not a senior staff member yet is trusted, is appointed chair.

Such a structure encourages and promotes people to understand leadership as being invested in all staff and not just associated with those having a high position.

We understand that leadership in an organisation can be on at least three levels:

1. Executive Leaders.
2. Line Leaders / Supervisors.
3. Internal Networkers and Community Builders.

All levels are important and yet the latter, the internal networkers, are essential if deep change is to take root within the organisation because they belong more to the social networks of the organisation than to the hierarchy. Staff look to these people to establish whether the proposed programmes are really important.







### **List of associated papers produced by the Future Ways Programme and Counteract**

- An Introduction to the Equity, Diversity and Interdependence Framework in the Context of Northern Ireland (K Eyben & D Wilson)
- Relationships and Interdependence in the Workplace. (Craig Cameron)
- Going Beyond Compliance - How IRNI have managed organisational & business implications of complying with Section 75. (David Hinstridge)
- Ethnicity, Identity and Change: New Challenges for Social Policy. (Ranjit Sondhi)
- Diversity Tools and Standards. (Research commissioned by Future Ways and Counteract from The Centre for Business and Diversity)

(These are available from the offices of Future Ways and Counteract (address over) at £5 a set plus P & P.)

### **Other materials by Future Ways:**

Public Policy Papers on Community Relations in Northern Ireland (Eyben, Keys, Morrow & Wilson)

- Research and Research Priorities on Community Relations
- Training and Learning for Community Relations
- Community Relations and Organisational Change
- Community Relations Policy Working Paper
- 'Experiments in Social Sustainability in Northern Ireland', a presentation to the Society for Organizational Learning (SOL), Greenhouse II Research Seminar, Hartford, Connecticut, September 2001.  
[www.sol.org](http://www.sol.org)

### **Forthcoming materials by Future Ways:**

- Learning Community Relations: Steps towards Equity, Diversity and Interdependence (Eyben, Morrow & Wilson) Chapter in forthcoming text by O. Hargie.
- The REDI Project - A practical examination of a three year organisational change project in a local council.
- Training material by Counteract  
A video on workplace issues is available from Counteract



The Future Ways Programme

Faculty of Social Sciences

and Faculty of Arts

Cavehill

University of Ulster

COLERAINE

BT52 1SA

Tel: 028 7032 4550

Fax: 028 7032 4674

Email: [da.wilson@ulst.ac.uk](mailto:da.wilson@ulst.ac.uk)

Website: [www.futureways.org](http://www.futureways.org)



*counteract*

Counteract

Philip House

123 -137 York Street

BELFAST

BT15 1AB

Tel: 028 9023 7023

Fax: 028 9031 3585

ISBN 1-85923-160-8