

OPTIMIZING  
ORGANIZATIONAL  
CULTURE

COMPANY  
OVERVIEW

2021

Creating More Inclusive &  
Equitable Work Environments





IT'S ABOUT  
MORE THAN JUST  
"CHECKING A BOX."

BUILD EQUITY  
& INCLUSION  
PRACTICES INTO THE  
FOUNDATION OF  
YOUR BUSINESS.





# Re-imagine

YOUR WORKPLACE

CREATING AN OPTIMAL

## ORGANIZATIONAL CULTURE

Truly transformative work environments create space where employees at all levels of the business can engage in their work and collaborate with others in authentic, transparent, and open communication. Businesses that prioritize diversity, equity, and inclusion demonstrate increased innovation, adaptability, and employee engagement and satisfaction.

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More and more businesses today have started the process of bringing Diversity, Equity, and Inclusion (DEI) into their workplace. Despite an intention and desire for change, many struggle to figure out just how to grow that process internally and really create lasting, sustainable shifts in their organization. They stumble quickly across two barriers: this work is about more than demographic numbers and one-off workshops, and it takes time.

Thankfully there are many different resources to help. Where experts in this field tend to vary is on the topics we teach, and in what sequence we offer support.

Integrative Inquiry Consulting is in the business of culture change. The approach we take is to prioritize addressing the interpersonal communication barriers that often inhibit real learning, trust, and growth. We have to be able to talk to others in authentic, transparent, and open ways if we want to get to the heart of the problems.

At each step of the way, we partner with organizations to help them embed and strengthen practices that build healthy organizational cultures. With the information we glean from assessments, we can train leadership and teams to better observe and alter their behaviors, policies, and process to directly impact the culture on a wider scale.

DEI must become a cornerstone of the values and ethos of the organization in order to effect lasting change. This is a huge endeavor, but there is a path you can follow.

Whether you are just starting this journey or have been working on it for years, we can help you look at the big picture, determine what you've accomplished so far and where you need to focus, and plan out next steps.





# Examine

## CHARACTERISTICS OF OPTIMAL WORK CULTURE

Since the beginning of the field of human resource development in the mid 1900s, researchers have been studying what makes effective teams and optimal work environments. In his article on organization culture and effectiveness, Denison (1995) discovered that high levels of employee involvement, adaptability, direction, and structure were strong predictors of company growth, innovation, and profit.

Adapting Denison's findings with additional research on organizational culture and employee engagement and infusing contemporary critical human resource theory and psychological safety, we identify five key characteristics of optimal work culture\*:



### INCLUSION & CONNECTION

The organization values input, perspectives, and contributions from all employees.

Employees report high levels of trust, strong relationships, active involvement, and a sense of community.

**Inclusion Safety:** belonging, rapport, caring (people care about my wellbeing)

Work cultures that are inclusive are relational in nature. They value the input, perspectives, and wellbeing of all members of a team, celebrate difference, and prioritize people over product. Inclusive teams have high levels of trust, collaboration and support, rooted in a foundation of psychological safety and community. The work environment is a place where employees feel seen, heard, and valued. Organizations with high levels of this characteristic often see high retention and employee satisfaction.



### GROWTH & CHANGE

The organization is able to effectively adapt and change and has a fierce commitment to learning/growth.

Employees report opportunities to grow and to give and receive feedback with compassion and candor.

**Learner Safety:** vulnerability, growth, support (I can ask questions/admit mistakes)

Organizations that are able to effectively respond to change are pioneers of innovation and create work cultures that encourage feedback, curiosity, and flexibility. Growth cultures teach individuals to seek opportunities to improve and acknowledge mistakes which can decrease burnout, stress, and work-related illness. Rather than simply react to changes, this characteristic is about integrating change into the culture itself. Organizations that have high levels of this characteristic often excel at creativity and are often on the cutting edge of their field. Their ability to evolve and pivot gives them greater flexibility to adapt with changing times, markets, and employee needs.





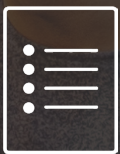
## DIRECTION & PURPOSE

The organization has clear vision, values, and goals that are widely understood and agreed upon by employees.

Employees report being able to see clear purpose, meaning, and impact of their efforts.

**Contributor Safety:** sharing & collaborating (my perspective/opinion is valued)

Strong organizational cultures have a shared vision and mission, with values and goals that are widely understood and agreed upon by employees. Employees should feel committed to the purpose of the organization and be able to directly see how their work contributes to it. This requires clear messaging, mentorship and guidance at all levels of the organization. Organizations with high levels of this characteristic often have inspiring, compelling messages that ripple throughout the organization and are shaped by the employees that work there. People are mission-driven in their work and live the company values. There is guidance and support provided for employees at all levels to improve.



## ORDER & PROCESS

The organization has clear, transparent communication with its team, and aligns procedures and policies with company values.

Employees report strong sense of responsibility, accountability, and role clarity within the organization.

**Transparency Safety:** candor, openness, truth (I can be honest and expect honesty from others)

Companies with clear structures, processes and procedures strengthen their organizational stability and transparency, which increases team efficiency. Employees trust the intentions and behaviors of leaders and in turn understand how their actions in turn contribute to the work environment. Organizations with high levels of this characteristic often have clear, consistent, and transparent policies, roles & responsibilities, and company-wide expectations that align with company values.



## AUTONOMY & AGENCY

The organization supports employee independence and creates more opportunities for distributive power.

Employees at all levels report higher levels of agency and advocacy and feel that they can fight for change.

**Challenger Safety:** calling in, critiquing, questioning (I can raise concerns and disagree with others)

Higher instances of employee independence and responsibility have been shown to directly increase engagement and productivity. When individuals feel as though they can directly contribute, impact, and address needs within their teams they are more likely to take on responsibility and leadership. Organizations with high levels of this characteristic often have highly participatory feedback, collaborative decision-making processes, and clear channels for employees to raise concerns, questions, and ideas. Employees are more likely to advocate for their own needs, client needs, and structural changes.

\*Further academic validation and resources can be found in our white paper on the subject. [www.integrativeinquiryllc.com/approach](http://www.integrativeinquiryllc.com/approach)

Bierema, L. and Callahan, J. (2014). Transforming HRD: A Framework for Critical HRD Practice. *Advances in Developing Human Resources*. Vol. 16(4), 429-444

Denison, D. and Mishna, A. (1995). Toward a Theory of Organizational Culture and Effectiveness. *Organization in Science*. Vol. 6(2), 204-223

Clark, T. (2020). *The Four Stages of Psychological Safety: Defining the Path to Inclusion and Innovation*. Berret-Koehler: CA

Maylett, T. *Engagement MAGIC: Five Keys for Engaging People, Leaders, and Organizations*. (2014). Austin: Greenleaf Book Group Press.





# Benefits

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Traditional human resource models frequently frame human development as a company commodity and a means to maximize profit, adopting the language of “human capital.” This results in strategies for improvement being structured primarily for cost-benefit analysis.

We believe that the value of employee education, learning and development are not limited to productivity and financial gains, and that there is value in human growth and satisfaction that is immeasurable by those indicators.

That said, there are clear financial and pragmatic advantages for businesses that invest in culture change and it is important to acknowledge the ways in which this process directly benefits the bottom line for businesses.

In our framework, we believe all forms of human resource development can and should increase:

**Employee Interest, Engagement, & Retention.**

Optimizing work culture not only attracts great employees to your business, it keeps them engaged, committed, and passionate and are the foundation of healthy thriving company cultures.

**Profitability, Productivity, and Sustainability.**

Research has shown that effective HR development enhances a business's profitability, sustainability and market competitiveness and overall increases team effectiveness, productivity, and quality.

**Preparation for the Demands of the Future.**

Optimal cultures integrate innovations necessary to ensure competitive advantage. Organizations that embrace diversity, a growth mindset, and commitment to change consistently report the most long term success and adaptability.

“I really appreciate how Integrative Inquiry is willing to meet us where we are and has been so understanding with us throughout the process. In the same way that their work reveals the humanity in all of us, they practice what they preach and are very willing to meet you where you are at, whatever stage of this work you are in.”

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*Danny Mejia, Program Specialist,  
Maine Boys To Men*





THERE ARE **THREE PHASES** THAT ORGANIZATIONS MUST ADDRESS IN ORDER TO SUCCESSFULLY TRANSFORM THEIR CULTURE:

INVESTIGATE

**Internal Equity Assessment** | Understand the current challenges and climate of organization

**Strategic Planning** | Design comprehensive longitudinal plan for implementation

EDUCATE

**Leadership Self-Assessment** | Reflect on where leaders are in their DEI journey

**Training** | Learn the key skills, concepts, and practices needed to shift culture

**Coaching** | One-on-one support for leaders to grow and troubleshoot challenges

INTEGRATE

**Strategic Interventions** | Team or departmental initiatives to deal with specific barriers

**Policy & Practice** | Execute new company-wide practices in hiring, promotion, and supervision

**Sustainability Plan** | Build internal team skills to continue





# Investigate

P L A N N I N G   F O R   E Q U I T Y

\_\_\_\_\_To truly impact DEI initiatives, organizations must begin with an initial analysis process to understand where their strengths and their gaps are inside their company. This is not about compliance requirements, good “scores,” or punitive policies. It is simply a benchmark process to help the company understand what current needs exist within their organization to help design a strategy that is relevant, impactful, and effective.

## CONDUCTING AN INTERNAL EQUITY ASSESSMENT

Even if you’ve started this process already, odds are there are still gaps in your initial analysis. We can work with you to piece together what you have tracked and help identify any key areas to explore to ensure that you are equipped with the information you need to directly impact your culture.



### DEMOGRAPHIC REPORT

Analyze diversity and track trends of demographic information about your organization regarding race, gender, ability, religion, orientation, and language.



### FOCUS GROUPS

Conduct focus groups by identity, role, or department in order to address barriers and document qualitative feedback.



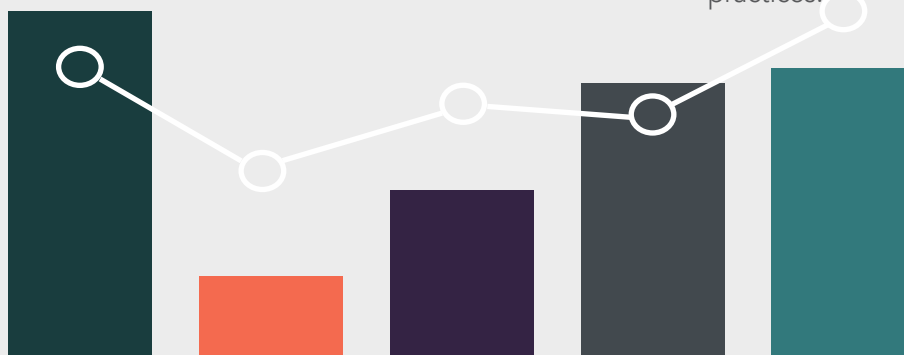
### CULTURE MAP

Use our state-of-the-art online survey to generate an aggregated report highlighting the areas of strength and opportunities to improve in our 5 key culture domains.



### POLICY ANALYSIS

Review of hiring, onboarding, exiting processes in place, functionality and use of feedback mechanisms, decision-making processes and professional development and promotional practices.



# SET UP FOR STRATEGIC PLANNING

Once organizations have clear data to indicate the areas of strength and opportunity within their workplace, we can begin to design an approach to the work.

Partnering with the HR, DEI, or leadership committee steering the initiative, we can create documents outlining your vision and next steps.

Keep in mind, strategic plans should always consider:

## **Results Based Accountability.**

Effort alone isn't good enough. Set up your culture change strategy with accountable, measurable targets that will guide your actions.

## **Longitudinal Design.**

Don't just plan for tomorrow. Consider what your 3/5/10 year goals might be in this arena. Focus on benchmark indicators that will help you strive to improve long after the honeymoon is over.

## **Curricular Threads and Goals.**

One-off trainings and external consultants only take you so far. Create a clear curricular plan with your improvements. Which stakeholders need what trainings? Why?



**“[Any organization that] hires Integrative Inquiry, would first have an inward understanding of where they are as an organization and culture, and then have a coach and partner to help them with a crucial foundational assessment before they decide to go one way or another.”**

*Julia Trujillo, Director of Office of Economic Opportunity, City of Portland ME*

Some organizations may have progressed through the initial Investigate phase and may even be already building their leadership bench through trainings.

We are more than happy to review any strategic documents and assessments completed prior to our partnership and use that information to inform the next phases.





# Educate

LEADING FOR EQUITY

Training must be relevant and applicable to be impactful. Leaders need to take an active role in the process of culture change, leading the work, not simply reacting to it. Whether in formal positions of power within the organization or spear-heading committees and initiatives, truly transformative leaders accelerate change around them. That requires substantial reflection, learning new concepts, tools, and frameworks for how we work together, as well as gaining practical experience and feedback as the learning continues.

LEVEL SETTING WITH A

## LEADING FOR EQUITY SELF-ASSESSMENT

Integrative Inquiry Consulting offers another unique tool designed for leaders looking to better center equity in their work environment.

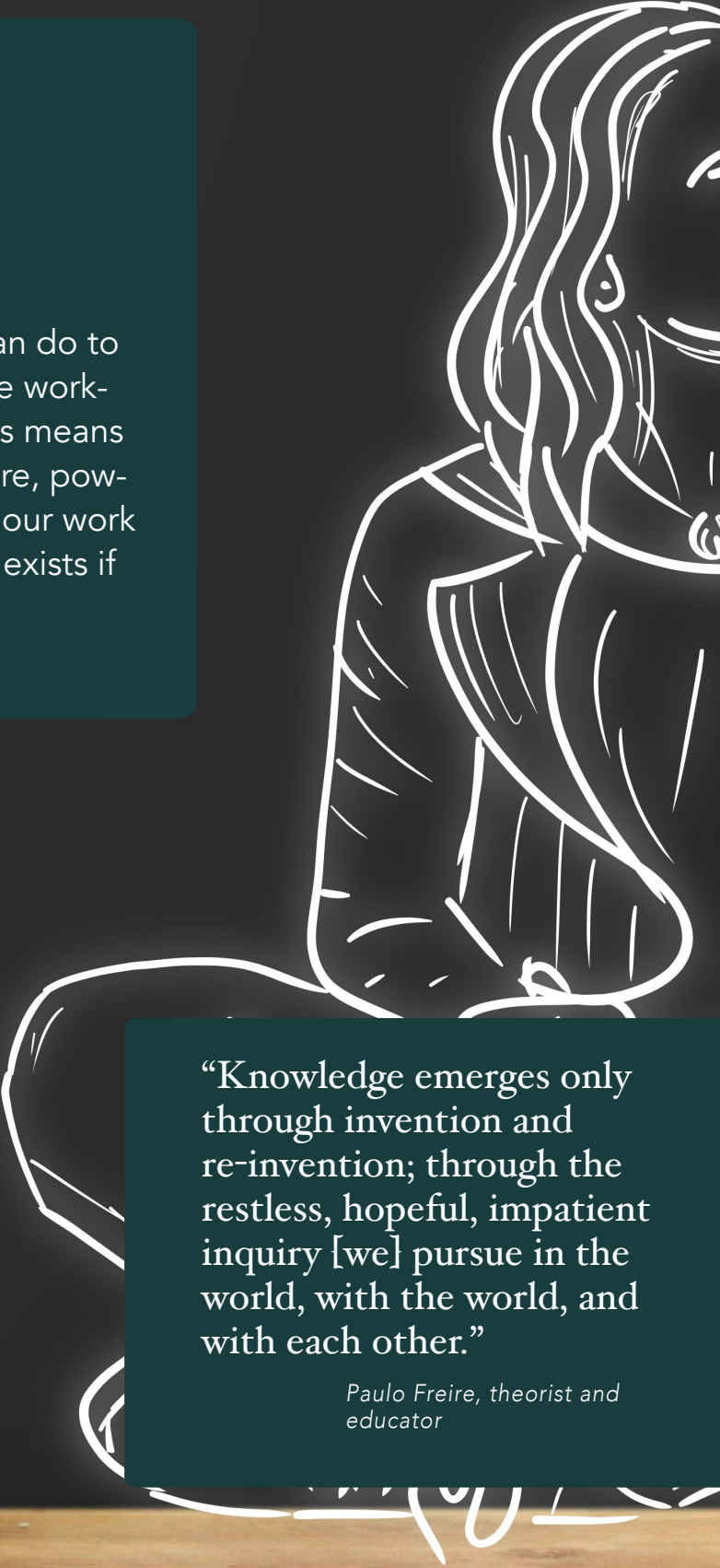
Our Leading for Equity Self-Assessment generates a report that helps leaders reflect on different aspects of their own development in order to intentionally address strengths and areas of opportunity in their own awareness, communication, and behavior. It also helps highlight how each individual relates to and addresses the policies and practices within their organization.

From this assessment, we can tailor a company's training curriculum and provide coaching to support leaders to grow.



# Develop Critical Consciousness

As leaders, the most essential thing we can do to create intentional, inclusive, and equitable workspaces is to build our own awareness. This means understanding the role that identity, culture, power dynamics and systemic barriers play in our work environments. We must understand what exists if we want to change it.



“Knowledge emerges only through invention and re-invention; through the restless, hopeful, impatient inquiry [we] pursue in the world, with the world, and with each other.”

*Paulo Freire, theorist and educator*





# LEARNING THROUGH TRAININGS & WORKSHOPS



## AWARENESS

- » Understand how individuals both impact and are impacted by the world around us.



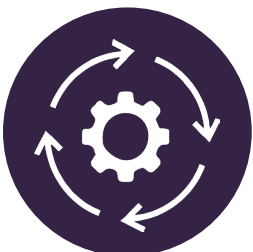
## COMMUNICATION

- » Consider how we engage others in discussion and dialogue and open up opportunities for change.



## ACTION

- » Learn how to change and improve our behaviors in concrete and tangible ways.



## POLICY & PRACTICE

- » Advocate for changes at the institutional/organizational level to create policies and practices that further DEI goals.

When it is clear what skills are needed on your team, it's time to get started with workshops and trainings specifically designed to address your team's barriers. The goal of training is to help participants develop new tools and techniques, breakdown barriers, and expand their awareness of themselves and others.

Our courses are designed to address the five characteristics of optimal teams, but they also work to develop different skill levels, as participants progress through individual, interpersonal, institutional, and systemic change.

One of the core tenets of Integrative Inquiry is authentic collaboration. We strongly value partnerships and the richness of experience that others bring in to this work.

Though internally we have a variety of expertise and experience on our own team, we are also more than happy to collaborate with outside parties in order to generate the best experience and service for our clients.

This doesn't mean you should waste company money, energy, and time on one-off sessions from a myriad of sources. The most important things to consider about trainings and workshops are the sequence, flow, and intention. Why this topic and this trainer? How does it address the expressed needs of your team? How does it connect and build off the previous learning you've done? We can help you think more intentionally about how to structure these to maximize impact.

## SUPPORT FROM

# COACHING & DEVELOPMENT

Training without application is ineffective at best. One of the primary challenges to embedding DEI initiatives and culture change is that companies often stop after running a workshop or two, and don't make the commitment to practice the skills being introduced. But this is where the magic happens.

Leaders often do not fully understand their impact on their organization's culture and the importance of taking action in this space to acknowledge their role in improving it. Coaching provides perspective when it comes to understanding our own development journey, whether as individuals or collectively as a leadership team. By cultivating inclusive skill building practices, we can become socially responsible leaders who are invested in creating positive and productive work environments for all our employees.



### **Developmental Coaching**

One-on-One sessions with leaders to hone their own practices and approach within an organization.



### **Team Coaching**

Group sessions with leaders to reflect on dynamics, to process initiative successes and challenges, and to adjust goals as needed.



### **Situational Coaching**

Scheduled as-needed sessions to trouble shoot specific barriers to the work and problem-solve together.



“I think one of the things [Integrative Inquiry] does is to push back and ask the questions that need to be asked... They don't shy away from difficult conversations, but tend to enter into them. That's been a huge value to our organization.”

*Jane Cooper-Driver, Chief Program Officer,  
Primary Care Progress*

## Have The Tough Conversations





“Authentic help means that all who are involved help each other mutually, growing together in the common effort to understand the reality which they seek to transform.”

*Paulo Freire, theorist and educator*





# Integrate

MAKING IT STICK

The truth is, having a plan and training your team may not be enough to transform culture on their own. This work is perpetual; there is no end goal, where everything is perfect and a company doesn't need to change further. We are always evolving and improving, so change must be built into the foundation of your business model.

## TARGETED SUPPORT WITH

## STRATEGIC INTERVENTIONS

Strategic interventions are those that have a targeted, intentional focus on areas of the business most acutely in need.

Instead of broad, generalized workshops, you can dive deep into a particular challenge. Noticing high turnover in one department? Let's focus there to better understand what is happening and how to correct it. Not seeing BIPOC (black, indigenous, people of color) or female employees rising above a specific management level? Put your focus on promotion, mentorship, and professional development.

By creating a system and process to conduct needs assessments and receive the necessary feedback, you can provide strategic interventions in an ongoing, "as needed" style.





## TRANSFORMING YOUR POLICY & PRACTICE

After you've identified what policies and practices may be contributing to inequity and barriers for some employees, you need to design and implement new strategies to address them.

We can partner with your internal team to draft new policies and practices and help train your management team to embody these practices.

The most significant reform you can make is how you invite and use feedback. None of us,

including our consulting team, can truly predict every possible concern, challenge, and barrier that your team may identify. It's important that you have a clear and open channel to hear from your team.

We can help you build systems and policies that reinforce the characteristics of optimal work culture, creating tangible mechanisms for change that will keep your business growing for years to come.



# BUILDING A SUSTAINABILITY PLAN

## TRAIN THE TRAINER

We are in the business of capacity building. Our long-term goal is to get every client to the place where they can continue culture change work internally, without the support of an external consultant. We want to teach you to do what we do.

To that end, we specialize in trainer development. We will work with your internal team to make sure they feel confident facilitating courageous dialogue and introducing concepts of safety, equity, inclusion, and culture with your employees. By focusing on internal capacity, you can begin a process of sustainable growth and discussion that will create lasting change for your organization.

## INSTRUCTIONAL DESIGN

Having educational design theory backgrounds, our team can build the custom curriculum you need to offer culture change work in your organization. From equity onboarding materials to management training and professional development, we can build your curriculum in a comprehensive and clear manner.

Session outlines, trainer notes, participant guides, slides and other materials will be branded to you and able to be used in perpetuity.

“[When training others to facilitate], you just know Kate is going to be there, and you know that she will have something thoughtful to say to redirect that tension in a way that is helpful to the trainee and the participants that were involved.”

*Marcel Tam, Assistant Professor and  
Leadership Director, Oregon Health and  
Science University*





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“Alone we can do so little,  
together we can do so much.”

Hellen Keller

*Int Inq collaborators pictured here (from top left): Alyne Cistone, Kate Stitham, Abbie (Miyabi) Yamamoto, Georgie Hinojosa, Claudette Ndayinahaze, Sanam Jorjani.*

To learn more about our team and business, go to [www.integrativeinquiryllc.com](http://www.integrativeinquiryllc.com).

“We must think more holistically about change if we truly want DEI initiatives to create impactful change. We have to start with how we raise concerns, solve problems, and treat one another.”



Kate Stitham, Integrative Inquiry President & Founder

## WHO WE ARE

Integrative Inquiry is a Maine-based consulting firm that partners with a diverse team of specialists from across the country to create lasting, impactful change for organizations.

We focus on capacity building and agency, so that organizations can take on culture change principles and continue to transform and evolve the way they work together long after we part ways.

Integrative Inquiry is a firm committed to equity across all dimensions of identity, including race. Our team represents a wide spectrum of perspective and experience, and this certainly informs and strengthens all aspects of our work.

The focus of our business is to develop organizational cultures where individuals have the interpersonal communication skills and awareness to help foster psychological safety. This ensures that difficult conversations can be addressed with transparency, vulnerability, and integrity.

For more information, go to [www.integrativeinquiryllc.com](http://www.integrativeinquiryllc.com).





# INTEGRATIVE INQUIRY

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Culture Change  
That Works.



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