

Navigating the EO and EEO Strategic Landscape: A Guide for Senior DoD Leaders



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DoD, EO, EEO, and Strategic Landscape

Policy and Definitions

Definitions

The Military Equal Opportunity Program seeks to create an organizational culture and climate that ensures that all service members can reach the highest level of responsibility that their abilities allow (DoD, 2009). To that end, the equal opportunity (EO) climate is defined as employees' perceptions of the degree to which discrimination and harassment are likely to occur within their work unit (Dansby & Landis, 1991). EO climate specifically addresses the perception of discriminatory and/or harassment behaviors. According to James & Jones (1974), EO climate is traditionally described as a psychological climate as opposed to an organizational or unit climate.

Diversity is defined by Executive Order (E.O.) 14035 (2021) as “the practice of including the many communities, identities, races, ethnicities, backgrounds, abilities, cultures, and beliefs of the American people, including underserved communities.” In the DoD (DoDI 1020.05, 2020), it is defined as “all the different characteristics and attributes of the DoD’s Total Force, which are consistent with our core values, integral to overall readiness and mission accomplishment, and reflective of the nation we serve.”

E.O. 14035 (2021) also defines inclusion, going beyond the basic welcoming of diverse communities, as “the recognition, appreciation, and use of the talents and skills of employees of all backgrounds.” The DoD takes it even further (DoDI 1020.05, 2020), with an extensive definition for inclusion:

[Inclusion is] a set of behaviors (culture) that encourages Service members and civilian employees to feel valued for unique qualities and to experience a sense of belonging.

Inclusive diversity is the process of valuing and integrating each individual's perspectives, ideas, and contributions into the way an organization functions and makes decisions; enabling diverse workforce members to contribute to their full potential in collaborative pursuit of organizational objectives.

As the instruction points out, effective diversity practices require inclusion, and for that to succeed, *all individuals* must be enabled to contribute, making accessibility a key factor in diversity initiatives. Accessibility is defined by E.O. 14035 (2021) as “the design, construction, development, and maintenance of facilities, information and communication technology, programs, and services so that all people, including people with disabilities, can fully and independently use them.” All aspects of an environment, whether physical, psychological, or interpersonal, must be addressed in order to maximize force readiness and effectiveness.

To meet this goal, the Military Equal Opportunity (MEO) and Equal Employment Opportunity (EEO) programs have been established. These programs are similar in that their end goals are the same: to prevent harassment and discrimination and provide an outlet for reporting and response when prevention does not work. However, the two programs have major key differences. The MEO program applies primarily to active-duty Service members, that is, soldiers who serve full-time or National Guard members who are in uniform and on duty. The EEO program supports Department of Defense personnel, to include government workers, civilians (including Service member dependents and spouses), and contractors (when appropriate). Figure 1 illustrates some of the similarities and differences between the programs.

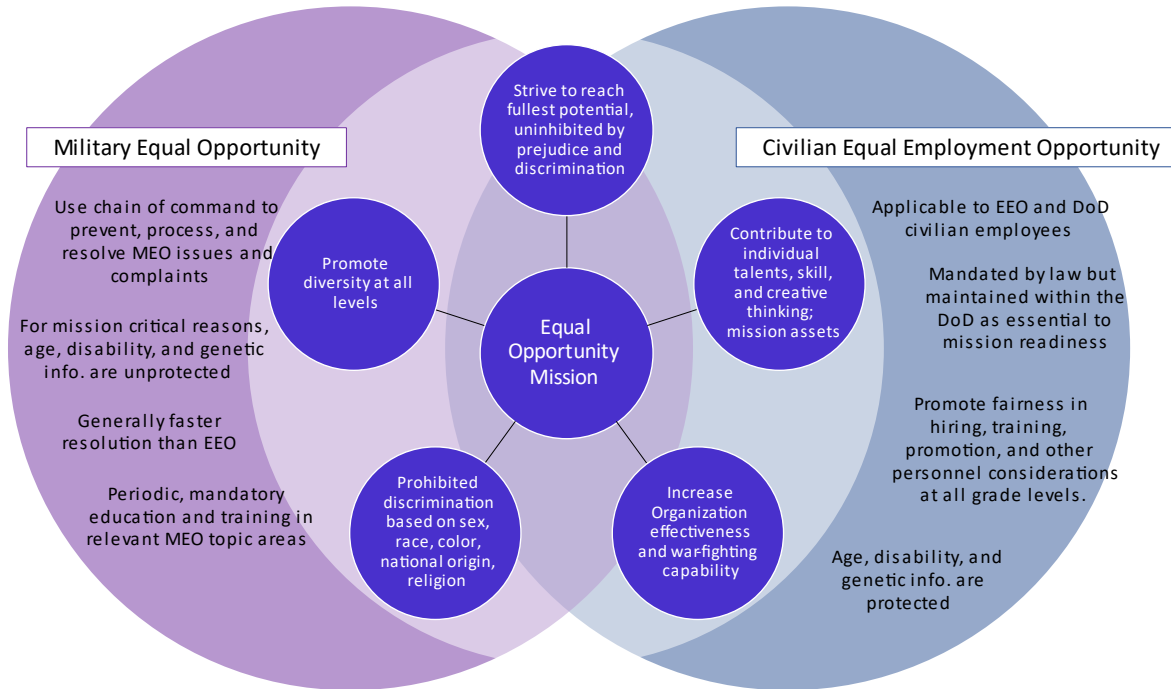


Figure 1 Brief overview of MEO and EEO programs (similarities and differences).

The Military Equal Opportunity (MEO) program is defined by Department of Defense Instruction 1350.02, entitled *DoD Military Equal Opportunity Program (2020)*. As defined by that instruction, the Equal Opportunity Program does the following:

- “Ensure that Service members are treated with dignity and respect and are afforded equal opportunity in an environment free from prohibited discrimination on the basis of race, color, national origin, religion, sex (including pregnancy), gender identity, or sexual orientation” (p. 4).
- Provide reporting, tracking, and resolution to complaints of violations.
- Prevent and respond to discrimination allegations.
- Hold leaders accountable.
- Prevent retaliation.
- Respond to harassment incidents.

The instruction offers guidance and imperatives for the practical applications of the program, including the various responsibilities of senior leaders within the Department of Defense, the procedures for responding to EO complaints, and training and education.

Whether or not a case is an MEO case or an EEO case depends greatly on the circumstances and the personnel involved. It is possible that a case may involve a military member and a civilian, in which case both EEO and MEO might get involved. EEO cases can involve human resource (HR) departments or legal experts and depend largely on the structure in place.

Policy Alignment

Initiatives

Military Equal Opportunity

- Executive Order (E.O.) 14035 (2021)
- Diversity and Inclusion Strategic Plan 2012-2017
- Diversity and Inclusion (DEIA) Strategic Plan 2022-2023
- DoDI 1020.02E (2018)
- DoDI 1350.02 (2020)
- SecDef Memo 07/14/20

Equal Employment Opportunity

- Executive Order (E.O.) 14035 (2021)
- Diversity and Inclusion strategic plan 2012-2017
- Diversity and Inclusion (DEIA) strategic plan 2022-2023
- DoDD 1020.02E (2018)
- DoDD 1440.1 (2003)

- SecDef Memo 07/14/20
- EEOC Management Directive 715
- Administrative Instruction 31 (2013)
- EEOC Regulations & Laws reinforced by EEOC
- 2014 Human goals charter

Diversity and Inclusion

- Executive Order (E.O.) 14035 (2021)
- Diversity and Inclusion strategic plan 2012-2017
- Diversity and Inclusion (DEIA) strategic plan 2022-2023
- DoDI 1020.05 (2020)
- SecDef Memo 06/19/20
- SecDef Memo 07/14/20
- SecDef Memo 12/17/20
- Administrative Instruction 31 (2013)
- Notification and Federal Employee Antidiscrimination and Retaliation Act of 2002 (No FEAR Act)
- Department of Defense Equity Action Plan
- Department of Defense Board on Diversity and Inclusion Report: Recommendations to Improve Racial and Ethnic Diversity and Inclusion in the U.S. Military

Responsibilities

Fundamentally, the responsibility for ensuring an equal opportunity workforce within the military falls on each and every Service member to treat their fellow Service members with respect and dignity. However, for the purposes of ensuring compliance with those values and

with the policies outlined, the following individuals are tasked with various aspects of the EO program (DoDI 1350.02, 2020, pg. 6-11):

- Undersecretary for Personnel and Readiness (in charge of policies, data, command climate assessments, and reporting out to the Secretary of Defense)
- Director, DoD Human Resources Activity (logistical support, funding, selection of personnel to work at Defense Equal Opportunity Management Institute (DEOMI), including the Commandant)
- Director, Diversity Management Operations Center (DMOC) (operational guidance, educational standards, oversight of DEOMI curriculum and various other DoD programs)
- Director, Office of People Analytics (survey development, including command climate assessments)
- Executive Director, Office of Force Resiliency (complaint procedure compliance and response)
- Director, Office for Diversity, Equity, and Inclusion (ODEI) (developing policy, oversight of compliance, including compliance review, data assessment, oversight framework)
- Other DoD Component Heads (establish prevention and response programs for individual units and departments as needed)
- Secretaries of the Military Departments (establish prevention and response programs for individual units and departments as needed)
- Chief, National Guard Bureau (established prevention and response programs in the National Guard)

One major difference between MEO and EEO is that all concerns raised by active military members go through the chain of command as the primary response, as equal opportunity (EO) officers are required to report incidents to the chain of command. The reporting process is outlined in the next section, but this process differs greatly from the EEO side, which must follow the laws and procedures of the civilian legal system. The military's own justice system supersedes that of the U.S. justice system, including local police; only Congress has the power to intervene with the military justice system (Wegener, 2022). The Privacy Act also allows the military to keep information about any investigation completely confidential, and military leadership is not required to release names or case outcomes to the public (Wegener, 2022). The autonomy of military leaders to respond to cases can be positive (commanders reserve the right to put an alleged offender in a holding cell, for example) or negative (commanders may choose to dismiss cases, with or without reason and without needing to disclose a reason) (Wegener, 2022), depending on the situation.

Procedures and Requirements for Processing MEO Complaints

Equal opportunity complaints can be filed formally or informally, as well as anonymously. It is the Equal Opportunity Advisor's role to inform Service members of their options as well as advising them of the available resources. The protocol outlined by DoD Instruction 1350.02 (2020) informs the following sections.

Informal Complaints. Informal complaints are addressed at the lowest level possible for resolution. They must be addressed within three days and resolved within thirty days. If the individual filing the complaint is not satisfied with the outcome, they may file a formal complaint. Informal complaints can be handled by an EO professional or by a member in the chain of command.

Formal Complaints. Formal complaints are addressed by the EO professional, who then submits a report to the supervisor or commander. The EO professional must provide the Service member with information about retaliation/reprisal policies and information about the investigation process, as well as monitor the investigation process and adhere to policies and procedures. The EO professional also must refer the complaint to the supervisor or commander within three days. The supervisor or commander must notify the appropriate legal office, as well as submit final reports and keep all Service members involved informed about the investigation process. Formal complaints should be resolved within thirty days unless an extension is granted. The Commander will have final word on any further necessary actions. Complaints against a member of chain of command will be referred to next highest member of command.

Anonymous Complaints. Anonymous complaints should be investigated to the extent possible, given the information provided. Anonymous complaints should be handled within thirty days and any additional complaints uncovered must be investigated as well.

Impact on Individuals

Research has found multiple benefits an individual gains from working in an organization that emphasizes the importance of EO, diversity, and inclusion. Among these are psychological safety (Booker & Williams, 2022; Canlas & Williams, 2022), improved job satisfaction, and decreased job-related stress (Walsh et al., 2010). Environments that are inclusive of a diverse population have been linked to better mental health, improved well-being, and increased productivity (Polchar, Sweijs, Marten, & Galdiga, 2014). Inclusive environments have also been linked to enhanced employee confidence (Ferdman, 2003); perceptions of a fair diversity climate positively impact job performance (McKay, Avery, & Morris, 2008) and increase organizational commitment, while decreasing employee turnover (Buttner, Lowe, & Billings-Harris, 2010).

Overall, both racial and ethnic discrimination have been linked to a variety of adverse employee health outcomes (Paradies, 2006; Williams & Mohammed, 2009), to include mental health effects such as increases in depression, anxiety, and psychological distress (Lee & Ahn, 2012; Raver & Nishii, 2010; Slopen & Williams, 2014). These effects also extend to bystanders observing ethnic and racial harassment and discrimination and include being less satisfied with one's coworkers and supervisors, lower self-esteem, and an increase in health issues (Low et al., 2007). Among LGBT individuals, employment discrimination has been shown to negatively impact employee's health, while lowering both job satisfaction and commitment (Sears et al., 2021).

Discrimination in the workplace is associated with poor outcomes: "results show that perceived racial discrimination at work is negatively related to job attitudes, physical health, psychological health...and diversity climate" (Triana et al., 2015, p. 502). Workplace discrimination has also been linked to smoking and alcohol use (Chavez et al., 2015). Being subject to discriminatory behavior can adversely impact retention, especially if reports of such behavior are not followed by positive actions from the affected individual's chain of command (Daniel et al., 2019); 43 % of U.S. employees reported having left a job due to unaddressed discrimination (Schmidt, 2022). It should be noted that discriminatory behavior can occur on a continuum and that even subtle slights that do not reach the threshold of prohibited discrimination may harm employees' health, wellbeing, and work performance (Smith & Griffith, 2022).

Impact on Organizations

Research has found that an organizations' diversity practices impacted employee engagement (Downy, van der Werff, Thomas, & Plaut, 2015). Organizations with more

effective diversity and inclusion strategies show an increased level of employee engagement. This relationship is valuable for senior leaders to understand when creating and implementing policies and strategies in order to ensure mission readiness. An engaged Service member is a stronger Service member, both mentally and physically. Racial and ethnic harassment and discrimination can be costly to organizations, as they lower productivity and job satisfaction while increasing turnover intentions among employees (Bergman et al., 2012; Steinback & Irvin; 2012). Discriminatory behavior results in a variety of adverse outcomes such as poorer interpersonal interactions (McConnel & Leibold, 2001), constrained employment opportunities (Bertrand & Mullainathan, 2004), including bias in the military leader selection process (Holt & Davis, 2022), and even a decreased likelihood of receiving life-saving emergency medical treatment (Green et al., 2007).

Antecedents

With approximately 3.5 million men and women in uniform, 17.2% of whom identify as women and 31.1% identifying as a minority group, the United States military has become one of the most diverse organizations in the world (DoD, 2020). It is more important than ever to ensure the physical and mental well-being of our service men and women. The Military Equal Opportunity Program seeks to create an organizational culture and climate that ensures all service members can reach the highest level of responsibility that their abilities allow (DoD, 2009).

Organizational Culture

The military has a long history of tradition that creates the foundation of its organizational culture. Each branch prides itself on not only celebrating their culture, but incorporates rituals and practices to teach this culture and history to new recruits. While passing

culture to new recruits can help to sustain an efficient and structured organization, potential risk factors can arise, such as hazing. These ceremonies and rituals symbolically convey organizational values and norms, and communicate tangible ways organizations create and maintain culture (Higgins & McAllaster, 2002; Beyer & Trice, 1987). Organizational culture is defined as the collective beliefs, assumptions, and ideas developed by a group of individuals that defines group interaction (Schein, 1985, Schein, 2010).

Artifacts are the elements of organizational culture that are visible to individuals outside the organization. These represent visible organizational structures and processes. Values are the strategies, goals, and philosophies endorsed by the organization. Assumptions represent the unconscious beliefs held by members within the organization. Assumptions are usually unwritten, unspoken, and unseen; and, therefore, harder for organizational leaders to pinpoint. (Schein, 1985; Schein, 2010).

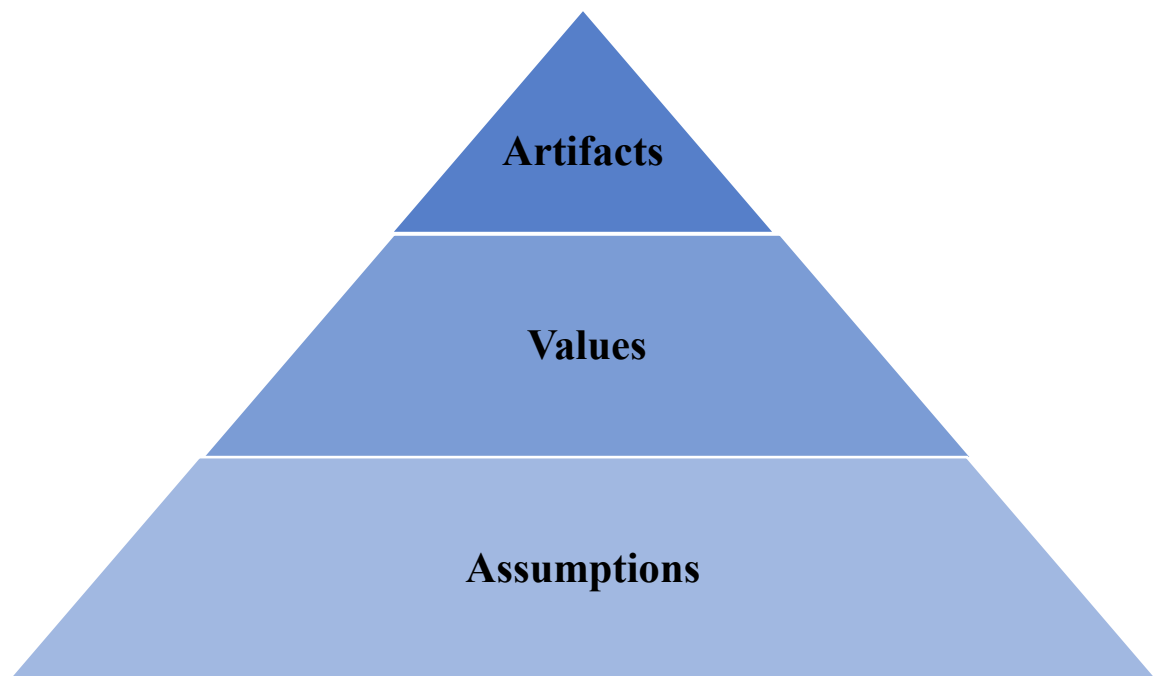


Figure 2 Visualization of Schein's Organizational Culture Model (1985).

Organizational culture can also be viewed as the set of norms and rules that are taught to new members of organization (Williams et al., 1994); thus, organizational culture forms the foundation on which an effective MEO program is built. The degree of diversity found in the military has created a need to address organizational culture and how it impacts operational readiness and mission success. Research has shown that organizational culture impacts employee attitudes and organizational effectiveness (Gregory et al., 2009), and increases knowledge management and organizational effectiveness more than strategy and structure (Zheng, Yang, & McLean, 2010). Due to the diversity of the military, the organizational culture must constantly adapt and evolve to address the implications of an ever-changing background of new recruits, without changing the fundamental organizational structure.

This need for constant change and adaptation has only reinforced the significant role that Equal Opportunity Advisors play in shaping the future of the culture in the military, while also maintaining the necessary order that, at the core, distinguishes the military organization from civilian organizations. Equal Opportunity Advisors must play a role in not only addressing the changing culture and climate of the military, but also must play a role in addressing how changes and training are adopted.

Organizational Climate

Organizational climate can be defined as functional workplace behaviors and practices, including perceptions and responses, to meet organizational goals (e.g., Albrecht et al., 2015; Pulphon et al., 2021). In the military and DoD space, the definition of climate is multi-faceted. Specifically, climate can refer to workplace behaviors and practices specific to a group (Office of People Analytics, 2019). Climate can also refer to how personnel perceive their organization, which can vary depending on the personalities within the unit (Department of the Army, 2022);

the definition of climate can even be Service specific (e.g., Kerl, 2018). Climate can also vary from the larger organizational culture (Office of People Analytics, 2019). In this case, culture can be defined as rules, structures, traditions, and understanding that molds and shapes an organization (e.g., Bossard, 2017; Office of People Analytics, 2019). It is passed through socialization and rituals (e.g., historically rooted) and is more stable over time than climate (Office of People Analytics, 2019).

While organizational culture dictates how the organization operates, organizational climate defines how the members of an organization perceive the environment around them. Truhon (2008) notes that organizational climate can vary within the same unit based on the demographic breakdown of the unit; women tended to report greater perceptions of sexual harassment, while African Americans reported higher rates of perceived differential command behaviors. Truhon (2008) also points out that Whites perceived more positive levels of EO behaviors than both minorities and women. These variables must be acknowledged when addressing how the organizational culture is being perceived, and ultimately, how it is affecting unit cohesion.

A positive organizational climate has the greatest impact on decreasing sexual harassment, reducing retaliation against those reporting, and improving the work and psychological outcomes of victims (Bergman, Langhout, Palmieri, Cortina, & Fitzgerald, 2002; Glomb, Munson, Hulin, Bergman, & Drasgow, 1999).

Diversity and Inclusion

In an organization such as the armed forces, diversity becomes evident in the recruitment of new service members and the job placement of those new recruits upon completion of Basic Training (DoD DEIA Strategic Plan, 2022-2023). In order for military leadership to ensure a

diverse workforce, efforts must be made to ensure that all new recruits are placed in roles that are best suited for the particular knowledge, skills, and abilities they possess (DoD DEIA Strategic Plan, 2022-2023). This initial placement upon entry into the armed forces is a crucial stepping stone in creating an inclusive workplace. By creating a truly inclusive environment from the very first moment someone enters the Services, leadership can ensure that unit cohesion and force readiness are fostered (DoD DEIA Strategic Plan, 2022-2023).

While diversity within the armed forces is easier to implement and measure through recruitment and placement, inclusion is a long-term investment in the organizational culture and requires more complex measurement and monitoring approaches. An area of concern related to the military culture is the practice of assimilating new recruits, rather than creating inclusivity. This assimilation process, while at the core of military life, is counter-intuitive to creating an environment of inclusion. Marvasti & McKinney (2011) argue that ignoring cultural differences furthers the fiction of equality, and trains the mind to “ignore and suppress” instead of working to address racial disparities. Leaders must be aware of this risk and take steps to ensure that assimilation into military life does not create an environment that invalidates the benefits of a diverse and inclusive culture.

In looking at the strategic landscape in regard to diversity, equity, inclusion, and accessibility (DEIA), leaders must examine Service member responses to intentional shifts in the organization, recognizing that unknown factors will impact future strategies. The current DoD DEIA (2022-2023) strategic plan makes a strong case regarding the need for data-driven current and future strategies.

The current DoD DEIA (2022-2023) strategic plan has developed four principles to guide DEIA strategies and initiatives.

1. Informed Decision-Making
 - a. DoD DEIA efforts are based on a routine timetable; driven by an evidence-based data collection, analysis, and assessment framework; and incorporate internal and external feedback, resulting in sustainable, continuous, and measurable improvements in DEIA outcomes across the Department that inform national security decision-making.
2. Integrated and Collaborative Approach
 - a. DoD advances a whole-of-agency DEIA approach with fully engaged and integrated DoD Senior leadership that supports the effective and measurable execution of strategic goals across all global mission operations.
3. Improved Access
 - a. DoD removes barriers and provides enhanced opportunities for qualified individuals, including individuals with disabilities, and provides organizational support to address all aspects of accessibility globally.
4. Increased Agility and Adaptability
 - a. DoD ensures the capability to integrate new aspects of DEIA and to combat emerging DEIA barriers in support of the Joint Warfighter's enduring mission of deterring war and keeping our nation secure.

The strategic landscape of an organization will evolve over time as it adapts to external forces. The Department of Defense has learned this, not only by the shifts in demographics of the country, but also by changes in the political climate. With each new Commander-in-Chief and Congress, policies are changed and adapted to reflect these shifts in external forces. This is

most recently evidenced by the changes in the DEIA 2022-2023 Strategic Plan from the DEI 2012-2017 Strategic Plan, but also by recent Executive Orders 13583 (2011), and 14035 (2021).

Risk and Protective Factors

Risk Factors

Research has found that negative EO behaviors (e.g., racist behaviors and sexual discrimination) are associated with lower job satisfaction, organizational commitment, and work group effectiveness (McIntyre, Bartle, Landis, & Dansby, 2002). Additional risk factors are related to power dynamics and trust. Research into organizational power dynamics has found that individuals from low-status groups are seen as less effective when placed in positions of leadership, have their power viewed as illegitimate, and are more likely to use their positions of power to prove their value (Lucas & Baxtor, 2012). Thus, as individuals of minority groups continue to rise through the ranks and are considered for positions of leadership, military members must receive training to help them recognize and combat these implicit biases in selection, evaluation, support, and awards processes.

Protective Factors

Understanding diversity serves as a protective factor, as it helps leaders recognize and relate to the identities of those who report to them, as well as how their own identities influence their perspective and shape their behaviors. Prior research has found that a positive EO climate is associated with positive organizational commitment, job satisfaction, and perceived work group effectiveness (McIntyre, Bartle, Landis, & Dansby, 2002; Estrada, Stetz, & Harbke, 2007). Cross-cultural competence can be a great tool to this end.

Cross-cultural competence in the military has been defined by Hajjar (2010) as “the knowledge, attitudes, and behavioral repertoire and skill sets that military members require to

accomplish all given tasks and missions involving cultural diversity” (p. 249). Cross-cultural competency is required for an effective military force to 1) ensure a cohesive force made up of diverse individuals from the United States and 2) develop military plans with an understanding of other cultures (Hajjar, 2010). Cross-cultural competence is also vitally important to mission success overseas (Hajjar 2010). Without cross-cultural competency, military members risk offending the populations they are trying to serve, or having strategies for serving foreign communities fail due to a lack of common understanding (Hajjar 2010). Cross-cultural competence is a required piece of diversity and inclusion work (Kaufmann et al., 2014) and, as such, should not be overlooked. Examples of cross-cultural competence might include eliminating religious or personal quotes in email signature lines, refraining from overly religious tones in speeches or public statements, and others (Hajjar 2010). A recent study suggests that communication style, emotional intelligence, and character traits play a fundamental role in the cross-cultural competence of individuals (Kaufmann et al., 2014), suggesting that cross-cultural competence should not be pared down to singular components.

One particularly concerning form of communication that is detrimental to cross-cultural competency is microaggressions. One set of authors defines them as follows:

Racial microaggressions are subtle and everyday slights and insults that can include insensitive comments based on an array of racial assumptions about criminality, intelligence, cultural values, and citizenship, as well as the minimization or denial of the racialized experiences of people of color. (Lewis et al., 2016, p. 759)

An example of microaggressions was identified by that study: people telling black college women they were not “black” enough for speaking in a certain way or having a certain body type (Lewis et al., 2016). These types of comments have negative impacts on relationships and

feelings of belonging. Understanding the facets that comprise identity may help military leaders recognize how communication, DoD policies, and social constructs can influence or diminish individual identity.

The Loden Wheel (figure 3) represents a global view of the primary and secondary dimensions of identity. The inner circle represents the nine primary dimensions of an individual’s personal identity, while the outer wheel represents the secondary dimensions of an individual’s social identity (Loden, 2010). Each of these characteristics plays a role in shaping an individual’s beliefs, values, and self-image. Understanding the factors that shape an individual can inform decision making when implementing DEIA policies.

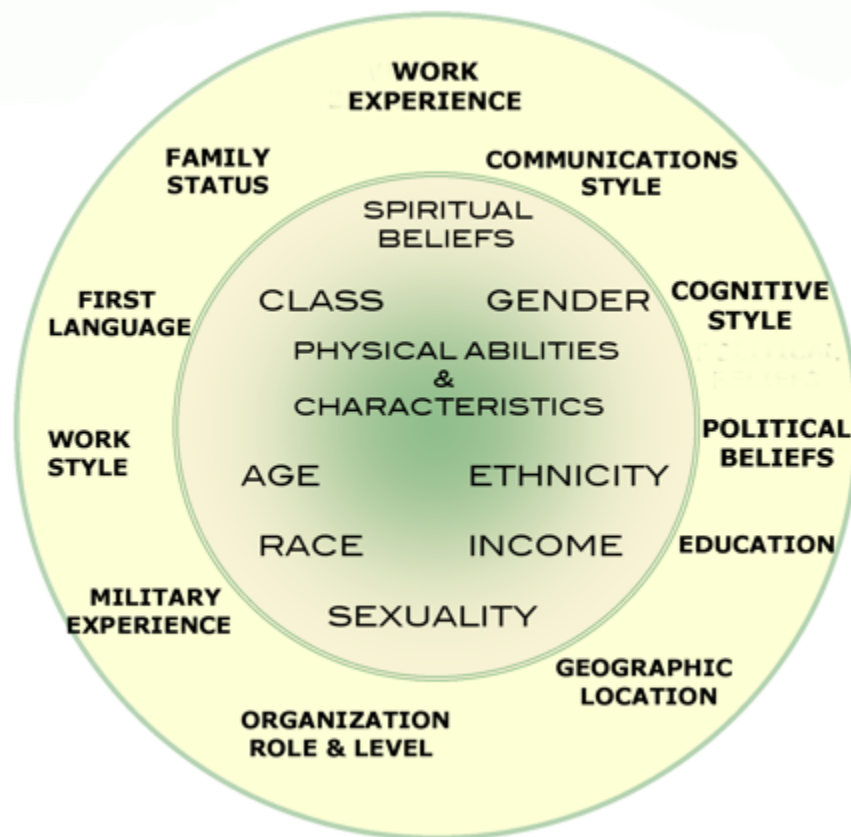


Figure 3 Loden's Diversity Wheel (2010).

Mitigation and Training

Training must be provided to all Service members and include all relevant information regarding reporting structures and leadership responsibility. Training should also be tailored to the rank of Service members in attendance, and to their position in the organization. Topics that must be covered include prohibited discrimination, harassment, sexual assault/violence, and retaliation, with a focus on creating a climate that does not tolerate such behaviors.

Research conducted on ways to decrease sexual harassment within an organization have revolved around training and policy implementation (Goldberg, 2007; Perry, Kulik, & Schmidtke, 1998; Reese & Lindenberg, 2004). Reese and Lindenberg (2004) note that while effective, policy alone is not enough to fully combat sexual harassment, and that training is of paramount importance. A number of training methods have been shown to be effective in teaching sexual harassment prevention. For example, research has found that video-based training has been effective in teaching sexual harassment prevention (Perry et al., 1998), as has computer-based or eLearning (Wellbrock, 1999), instructor-led training (Perry et al., 1998), and interactive or role-play learning (Perry, Kulik, & Field, 2009; Zawadzki, Shields, Danube, & Swim, 2014).

Recent research into sexual harassment training has proposed an organizational development and change perspective (ODC) towards addressing the underlying causes of sexual harassment (Burke & Noumair, 2015; Golom, 2018). The ODC perspective attempts to address the underlying culture of an organization and how that culture may fuel sexual harassment. By adopting a total system view of key problems, leadership can address the implicit culture and climate attributes that fuel discriminatory behaviors. Golom (2018), as cited by Perry and colleagues (2019, pg. 90), highlights that “an ODC perspective views problems like sexual

harassment as systemic phenomena that reflect deeper issues embedded at multiple levels within the organization,” thus taking a more organizational than individual approach.

Training centered around hazing focused on the individual level attempts to impact three areas: knowledge, attitudes and perceptions, and skills and behaviors. The goal of knowledge-based hazing training is to provide basic facts, concepts, and organizational rules and policies around the topic of hazing (Keller et al., 2015). Knowledge based antihazing training should focus on defining hazing, providing examples, outlining policies and repercussions for hazing, and explaining the harm hazing causes to the victim. This should be followed up with additional trainings to create an environment that deters hazing by also tackling attitudes and perceptions towards hazing practices. According to Crano & Prislin (2008), attitudes are defined as cognitive and/or affective responses that an individual holds on a particular topic. Antihazing training targeting perceptions may address misperceptions regarding the benefits of hazing (unit cohesion, proving toughness, and group indoctrination) (Van Raalte et al., 2007). Skill-based training should focus on teaching skills that help combat hazing.

The literature discussed in this section highlight that the characteristics of the organization play a significant role in the effectiveness of training (Alvarez et al., 2004; Salas et al., 2006). Furthermore, research into best practices of sexual harassment training has identified three factors that play a role in determining training effectiveness: pretraining factors, training design and delivery, and post training factors (Perry et al., 2010).

Pretraining Factors

Pretraining factors that have been found to affect training outcomes include individual characteristics, needs assessments, and motivational characteristics that exist prior to training (Salas et al., 1999). Research has found that conducting a pretraining needs assessment is critical

to training success (Salas & Cannon-Bowers, 2001; Salas et al., 2006). The pretraining needs assessment is used to identify the population that needs training, the method of training, and the necessary content for training. Without the needs assessment, trainers are unable to successfully identify the individuals needing training, modify the method, or adapt the training. Experts note that “Pretraining needs assessment can identify characteristics of individuals, jobs, and the organization that might influence whether training is effective” (Perry et al., 2010). Researchers have found that individual characteristics (previous training, abilities, attitudes, and motivation) have been found to play a role in training effectiveness (Alvarez et al., 2004; Kraiger, McLinden, & Casper, 2004; Salas & Cannon-Bowers, 2001; Salas et al., 2006). Without an initial needs assessment, these factors would not be identified, nor training modifications assessed.

Training Design and Delivery

Assessing training design and delivery will help ensure that the most appropriate curriculum is being implemented in the most efficient and effective way possible. The most effective training method implemented will depend on the specific material being taught (Alvarez et al., 2004; Arthur, Bennett, Edens, & Bell, 2003).

Previous research has shown that the majority of sexual harassment training is provided through passive learning methods such as videos, or in combination with discussions or case studies (Beauvais, 1986; Blakely, Blakely, & Moorman, 1998; Kearney, Rochlen, & King, 2004; Moyer & Nath, 1998; Perry, Kulik, & Schmidtke, 1998; Robb & Doverspike, 2001). When the objective of training is knowledge acquisition, lectures or other forms of passive learning have been shown to be both efficient and effective. However, research has found that role-play simulations are more effective for interpersonal skills and development of human relations skills

when the goal is to change peer-to-peer interactions (Salas et al., 1999; Kleiman, 1997). With this in mind, a combination of passive and active learning will yield the best training outcomes.

Post Training Factors

Organizations continue to weigh the return on investment (ROI) of trainings being provided; determining what post training factors play a role in determining training effectiveness should inform training development. Research into training effectiveness have found that a combination of individual characteristics, climate for transfer, motivation to transfer, and maintenance interventions all play a key role in determining the impact of training (Alvarez et al., 2004; Salas et al., 1999; Salas et al., 2006). Transfer climate and supervisor support has been found to have the greatest impact on motivation to transfer (Salas et al., 2006; Tannenbaum et al., 1993); supervisor support includes reinforcement and modeling behaviors (Baldwin & Ford, 1988; Salas et al., 2006). Researchers have also shown the importance of maintenance interventions for a lasting impact on training (Alvarez et al., 2004; Salas & Cannon- Bowers, 2001; Tannenbaum et al., 1993).

Additionally, new research has looked into organizational-level culture change to address discriminatory behaviors such as sexual harassment. As discussed previously, the recently developed organizational development and change (ODC) model looks to address the systemic causes of these behaviors (Burke & Noumair, 2015; Golom, 2018; Perry et al., 2019). An ODC approach is distinguished from a training-based approach in two ways: (1) an ODC approach uses joint diagnosis to identify the problem, and (2) an ODC approach focuses on organizational change rather than individual change.

Joint diagnosis. A joint diagnosis seeks input from multiple stakeholders to identify challenges within the organization (Burke & Noumair, 2015). Instead of relying on “experts” to

diagnose, ODC attempts to gather intel from all levels of the organization in order to uncover underlying culture and climate issues. This is where Equal Opportunity (EO) Advisors can play a role as change agents for the organization. EO Advisors become critical players, acting as a neutral party in collaboration with officers and enlisted personnel to identifying the culture and climate issues that need addressing. Through joint diagnosis, an organization is able to develop a wider understanding of the issues that members believe are most pressing and obtain a richer level of information.

Culture change. An ODC perspective strives to change the environment where the unwanted behaviors occur. Through this systemic change, an organization attempts to create an environment that encourages and rewards positive behaviors, and creates an environment where members feel comfortable addressing negative behaviors as they arise. This culture change occurs through multiple methods like adopting inclusive HR practices (Nishii & Rich, 2014) and coaching inclusive behaviors (Shore, Cleveland, & Sanchez, 2018).

A number of different cross-cultural assessment tools have been used over the past thirty years (Kaufmann et al., 2014). Because cross-cultural competence can refer to both within a singular body (such as a military unit or branch) or to communication with different cultures (such as foreign countries), the purpose and objectives of any training must be considered before selecting an assessment tool (Matsumoto & Hwang, 2013). Matsumoto & Hwang (2013) provide a framework for selecting the best assessment tool to ensure desired outcomes, which can serve as a foundation for future efforts.

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Activity Appendix

PRIOR TO ANY AND ALL USE OF THE ACTIVITIES IN THIS APPENDIX, PLEASE VERIFY THAT AUTHOR/OWNER PERMISSION IS OBTAINED WHERE NEEDED AND THAT USE OF THE MATERIALS DOES NOT RESULT IN COPYRIGHT INFRINGEMENT.

Activities

Hazing

Linda Langford (2004, 2008) proposes a comprehensive approach to hazing prevention training. Her work in higher education settings acknowledges that no two campuses are identical, and, therefore, a singular approach will not have an equal impact across organizations. Rather than a single training model, she recommends a set of principles and a process to address negative behaviors. This approach outlines a set of principles to address violence interventions:

- Prevention-focused and response-focused
- Comprehensive
- Planned and evaluated
- Strategic and targeted
- Research-based
- Multicomponent
- Coordinated and synergistic
- Multisectoral and collaborative
- Supported

In addition to the above principles, Langford & DeJong (2008) outline key steps in developing violence prevention strategies:

1. Conduct a problem analysis

2. Establish long-term goals and objectives
3. Consult research
4. Create a strategic plan
5. Execute an iterative evaluation plan

Microaggressions

Using the Inclusive Leadership Training Manual (<https://inclusiveleadership.eu/inclusive-leadership-manual-for-trainers/>), facilitators can begin discussion around examples of microaggressions and the impacts of such acts. Facilitators should help participants understand the term and the impacts as well as develop action steps for how to address such behaviors in their units.

Virtual Reality

Wagler and colleagues (2020) outline a proactive approach to diversity and inclusion training using Virtual Reality (VR) technology. They make an argument toward the benefits of using an immersive experience to engaging training scenarios. Virtual reality allows participants the ability to recognize unconscious biases and also learn skills and techniques to counteract these biases.

If I Ruled the World

The idea of this activity is to make your staff think of ways to make your company more inclusive. What changes would they make if they were in charge?

Time: You decide

Participants: Department

Materials: Paper/Computer

Instructions:

- At first, gather groups together and explain the exercise.
- Each member will come up with 3 real-life ideas of changes the company could make to be more inclusive. Tell them to be creative and to think outside the box.
- Once done, they'll turn in to you. As the facilitator, you'll review the ideas and submit a copy to Human Resources.
- If any of the ideas are selected, the person who came up with the idea gets a \$250 bonus.

Debrief: Explain that good ideas come from everywhere – from the janitor to the CEO. Great ideas can help change the world. Let them know their ideas are being reviewed by HR and one or more may be put into place.

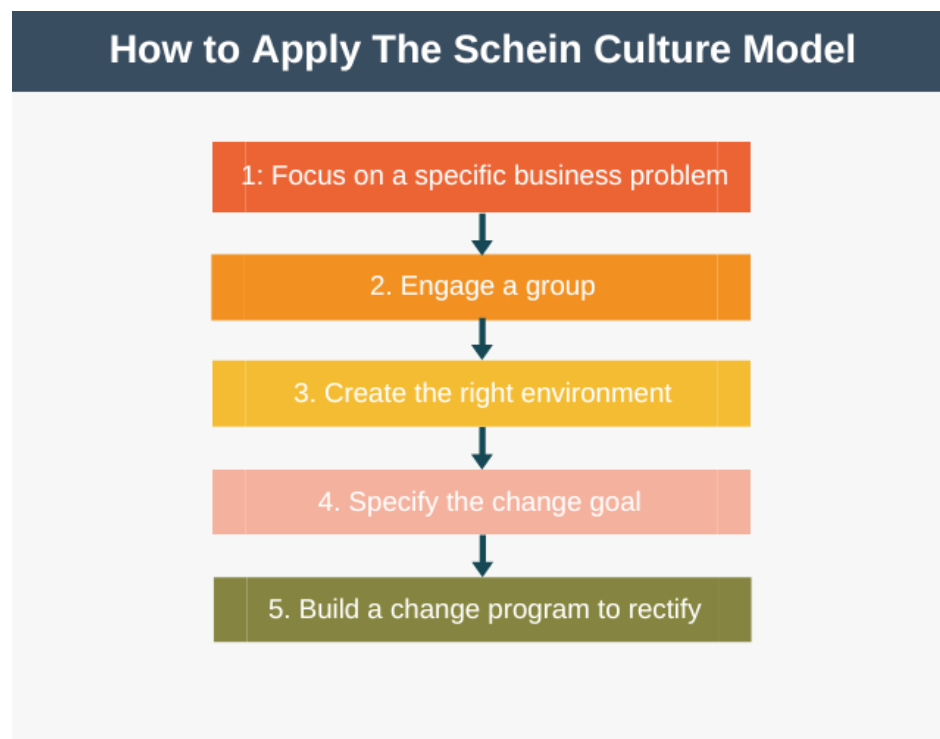
Applying the Schien Model

Figure 4 Minute Tools Content Team, Edgar Schein's Organizational Culture Model, Minute Tools, Sep, 2022
<https://expertprogrammanagement.com/2022/09/edgar-schein-culture-model/>

Definitions

- The Military Equal Opportunity Program seeks to create an organizational culture and climate that ensures all service members can reach the highest level of responsibility that their abilities allow (DoD, 2009).
- Equal opportunity (EO) climate is defined as an employees' perceptions of the degree to which discrimination and harassment are likely to occur within their work unit (Dansby & Landis, 1991). EO climate specifically addresses the perception of discriminatory and/or harassment behaviors. According to James & Jones (1974), EO climate is traditionally described as a psychological climate as opposed to an organizational or unit climate.
- Diversity is defined by Executive Order (E.O.) 14035 (2021) as "the practice of including the many communities, identities, races, ethnicities, backgrounds, abilities, cultures, and beliefs of the American people, including underserved communities." According to the DoD (DoDI 1020.05, 2020) "Diversity is all the different characteristics and attributes of the DoD's Total Force, which are consistent with our core values, integral to overall readiness and mission accomplishment, and reflective of the nation we serve."
- Equity is defined by E.O. 14035 (2021) as "the consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment."
- Inclusion is defined by E.O. 14035 (2021) as "the recognition, appreciation, and use of the talents and skills of employees of all backgrounds." According to the DoD (DoDI 1020.05, 2020) inclusion is "a set of behaviors (culture) that encourages Service members and civilian employees to feel valued for unique qualities and to experience a sense of

belonging. Inclusive diversity is the process of valuing and integrating each individual's perspectives, ideas, and contributions into the way an organization functions and makes decisions; enabling diverse workforce members to contribute to their full potential in collaborative pursuit of organizational objectives.”

- Accessibility is defined by E.O. 14035 (2021) as “the design, construction, development, and maintenance of facilities, information and communication technology, programs, and services so that all people, including people with disabilities, can fully and independently use them.”

Policy Alignment

Initiative	Policy
Military Equal Opportunity	<ul style="list-style-type: none"> • Executive Order (E.O.) 14035 (2021) • Diversity and Inclusion strategic plan 2012-2017 • Diversity and Inclusion (DEIA) strategic plan 2022-2023 • DoDD 1020.02E (2018) • DoDI 1350.02 (2020) • SecDef Memo 07/14/20
Equal Employment Opportunity	<ul style="list-style-type: none"> • Executive Order (E.O.) 14035 (2021) • Diversity and Inclusion strategic plan 2012-2017 • Diversity and Inclusion (DEIA) strategic plan 2022-2023 • DoDD 1020.02E (2018) • DoDD 1440.1 (2003) • SecDef Memo 07/14/20 • EEOC Management Directive 715 • Administrative Instruction 31 (2013) • EEOC Regulations & Laws reinforced by EEOC • 2014 Human goals charter
Diversity and Inclusion	<ul style="list-style-type: none"> • Executive Order (E.O.) 14035 (2021) • Diversity and Inclusion strategic plan 2012-2017

	<ul style="list-style-type: none"> • Diversity and Inclusion (DEIA) strategic plan 2022-2023 • DoDI 1020.05 (2020) • SecDef Memo 06/19/20 • SecDef Memo 07/14/20 • SecDef Memo 12/17/20 • Administrative Instruction 31 (2013) • Notification and Federal Employee Antidiscrimination and Retaliation Act of 2002 (No FEAR Act) • Department of Defense Equity Action Plan • Department of Defense Board on Diversity and Inclusion Report: Recommendations to Improve Racial and Ethnic Diversity and Inclusion in the U.S. Military
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