REVISED SUBMISSION:

A Diversity, Equity, and Inclusion Exercise Conducted in the U.S. South

*Abstract*

The author presents a novel exercise contributing to the field of diversity, equity, and inclusion. The exercise was tested, vetted, and documented in a medium-sized town in the U.S. South. The purpose of this exercise is to offer best practices and actionable tools for other instructors, leaders, and activists to replicate in their own respective classrooms, universities, organizations, and communities. The exercise was conducted by the author of this submission at an event designed as a listening session with roundtable discussions and breakout sessions to investigate why there is very little diversity in the merger and acquisition industry in the region.

*Body*

**Abbreviated Instructions for the Exercise**

The first step is to design the timeline, logistics, participant roles, prompts, and debriefing discussion questions. When presenting the exercise, include the purpose, rules of the game, procedures, logistics and timeframe. Consider how to modify questions, prompts and design of the exercise for diverse participants, including level of experience and education. Prompts and questions (see sample in Appendix A) facilitate inquiry and discussion regarding how people from diverse backgrounds access networks, secure resources, ask for assistance, and connect with others. In small breakout rooms, participants are given the opportunity to share their stories and experiences with inclusion (or lack thereof) and all participants can actively listen and engage in creative problem solving. The goal is to develop awareness of the experiences and challenges of others, while providing tools for students to improve their own as well as others capacity to communicate effectively with diverse populations while addressing barriers to equity and inclusion.

**Method**

I developed this exercise following design of an experiment conducted at an event in an entrepreneurial community in a medium sized, U.S. Southern town. The event was designed alongside a leader in the business community whose firm sponsored the event. The exercise is motivated by the desire to engage in inquiry about a common yet complex problem: why are there so few women and people of color among those investing in and purchasing businesses. It is designed to assist participants who are not experts in diversity, equity, and inclusion issues to engage in inquiry-based activities that facilitate the sharing of potentially personal and difficult information while encouraging deep, active listening, empathy and creative problem solving. I designed the exercise to be applicable to instructors of organizational behavior and theory and related courses, and the exercise is appropriate in the classroom and can be conducted in an average class period (ideally 75-120 minutes).

**Findings**

This exercise shares what I learned about how to collaborate with community leaders, design an event that includes relevant and representative participants, engage in outreach and promotion of the event, and design activities at the event that best encourage civil and safe communication surrounding a difficult and complex problem—lack of diversity in a sector of the economy and among the organizations who benefit. I learned nuanced understandings of how to phrase questions and discussion prompts, how to design an event that is effective at facilitating difficult conversations, and how to gather information from the exercise in a way that promotes actionable steps to begin to solve the problem.

**Classroom Execution**

This exercise conducted among a practitioner and professional audience has been adopted for the classroom in ways that deliberately facilitate difficult conversations surrounding structural, institutional, and cultural barriers and challenges to inclusion and diverse representation in homogenous economic sectors and the organizations that dominate them. Adopters of this exercise can expect deep-level discussions among students, who will learn how to effectively design as well as participate in active listening roundtable sessions that investigate organizational behavior and theory problems such as a lack of diversity, equity, and inclusion.

**Session Discussion and Objectives**

My objectives in presenting this exercise are to discuss, receive feedback, and improve the design for adaptation for the classroom and to share this with MBOTS participants for adoption in their classrooms, organizations, and communities. Performing this exercise-based exercise in an MOBTS session will help me improve its effectiveness as well as provide other instructors, consultants, leaders, and activists with the tools to execute this exercise outside as well as inside the classroom.

Given the intensity of the experience and sensitivity of the topic, I recommend this exercise be conducted in person. I will be sharing highlights of the exercise, including its purpose, the design of the exercises and a debriefing with attendees at the session. I plan to actively engage the audience in a sample roundtable exercise, where they will pretend that they are the students engaged in the roundtable sessions.

Author Notes: No special resources are needed for this exercise presentation. I am submitting to the conference theme track “*Diversity, Equity, and Inclusion*” as this exercise was conducted in a community and is designed to reveal the sources of lack of diversity, inequities, and possible environment/ culture that potential lacks inclusivity. This is a unique contribution, as the author designed the exercise in collaboration with local business/ finance leaders. Apart from the exercise being conducted in an actual entrepreneurial ecosystem, the exercise is designed around the activity conducted at an event and has never previously been presented to an academic audience. This proposal is not currently under review, nor has it been submitted anywhere except MOBTS 2022.

Appendix A:

*Instructions for implementation:*

Provide an overview of the purpose of the exercise, process, time limits, and other logistics. Break the audience into manageably sized teams of approximately 6-8 persons, being mindful of the process and outcomes to ensure teams are diverse and well represented by all members of the audience. Have the teams assign a timekeeper, process facilitator that is focused on making sure there is not excessive dominance on teams and that all voices are heard, and a note taker. Make sure all participants are granted access to paper and a pen or pencil.

*Prompts and questions: (note – these can be modified for diverse contexts and objectives)*

1. Please take 5 minutes to jot down your experiences seeking resources to support your business goals. (ex: financing for your business or startup; information about acquiring a business; knowledge about business ownership and how to go about it). Be sure to relay not only the steps taken, but how you felt and what you experience along the way. Who was helpful and who was not, and how did you experience these transactions, conversations, and engagements?
2. What can be approved in the ecosystem and among the support organizations, institutions, gatekeepers, decision makers and other actors to make the experience of seeking support for your business goals more accessible, supportive, and effective?
3. How have you experienced inclusion and/ or exclusion in the pursuit of resources, including information, mentorship, guidance, and financing? What specific recommendations can you make to make these experiences more effective and supportive?