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**Author** **Kimbrough Consulting**

Kimbrough Consulting helps the change to come with diversity, equity, inclusion services, strategic planning and group facilitation! Delores Kimbrough is the founder of Kimbrough Consulting. She is a Certified Diversity Professional (CDP) and SAGE Certified.
Welcome

This Inclusive Practices for Aging Services Organizations Report offers information that can help grow and nurture organizational cultures of inclusion. This report is a product of the LeadingAge Virginia Dreaming Home Project.

LeadingAge Virginia, Westminster Canterbury of Richmond, Beth Sholom, Pinnacle Living, Brandermill Woods, and LifeSpire of Virginia, the Dreaming Home project sponsors, recognize and celebrate the diversity of elders in the city of Richmond and surrounding counties.

The Dreaming Home Project was formed to:

- Inclusively help identify senior living desires based on diverse populations’ values,
- Empower elders with information on all options and services available in greater Richmond that might help to bring elders’ vision of “home” to reality,
- Provide tools to help Sponsors to assess their culture of inclusion.

Experiences in senior living communities can be influenced by an elder’s multiple dimensions of diversity - including ability, race, ethnicity, religion, spirituality, gender identity, language, sexual orientation, veteran status and socio-economic status. In organizations that foster cultures of inclusion, individuals are respected as valuable members of their community and barriers that hinder full participation of members of marginalized groups are removed.

The sponsors are pleased to provide the information in this report with the hope that it will enable residents and staff from all backgrounds to experience inclusion in aging services organizations.

Sincerely,
Acknowledgements

This report is available as a result of the generosity in time and funding from the project sponsors: LeadingAge Virginia, Beth Sholom, Westminster Canterbury Richmond, LifeSpire of Virginia and Pinnacle Living. Additionally, an advisory group was formed in May, 2022 to support and guide the Dreaming Home project. The members of the advisory group included:

<table>
<thead>
<tr>
<th>Name</th>
<th>Title/Role</th>
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<tbody>
<tr>
<td>Delegate Dawn Adams</td>
<td>Delegate for the 68th District of the Virginia House of Delegates</td>
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<td>Eric Lin</td>
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<td>Charles City County Parks and Recreation manager</td>
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Special thanks also to the following individuals for sharing important resources and perspectives: **Gigi Amateau**, MS, PhD, Assistant Professor, Department of Gerontology, Virginia Commonwealth University; **Jed Johnson**, MSW, MBA, Managing Director of Aging Services, CARF International.
Forward from Melissa Andrews,
President & CEO, LeadingAge Virginia

LeadingAge Virginia is committed to using open hearts and minds to expand the world of possibilities of aging. Our focus is to be a leading advocate for all of Virginia’s aging population. To maintain this status, we promote fair and open access to our services through continuous improvement of our policies and procedures targeted to remove barriers. We join our member communities to embrace the diverse perspectives of residents, employees and partners representing all genders, orientations, cultures, races, economic status, and ability.

We are steadfast in our pursuit to lead today, challenge ourselves in respectful dialogue, learn from the past and create opportunities to build a bright future for all who meet us.

In 2027, LeadingAge Virginia will be known for:

- **Setting the Standard** for impactful solutions that create value and meet the real-world challenges of our members through advocacy, education, and applied insights.

- **Innovative Connections** that leverage our unique standing as a trusted resource to convene and collaborate with thought leaders around emerging and important issues.

- **A Bold Vision and Positive Growth** that furthers our mission and expands our impact.

Those goals will only be achieved if we support the creation of healthy organizations embracing diversity, creating equity & building cultures of inclusion. We are the only association that represents the full continuum of older adult services and supports in Virginia, and are pleased to share this report on inclusive practices for aging services organizations in the hopes it helps our members and the greater community.

President & CEO, LeadingAge Virginia

Melissa Andrews
Introduction

What is “diversity”? What do you think of when you think of the word “inclusion”? What does “equity” mean? This is our starting point. We establish a shared understanding of diversity, equity and inclusion.

From that foundation, we discuss why Diversity, Equity and Inclusion (DEI) are important for aging services organizations. LeadingAge Virginia is a professional association representing the continuum of aging services throughout Virginia, including affordable senior housing, nursing homes, adult day, assisted living, home health, hospice, life plan and continuing care retirement communities. This document shares examples, tools and references specific to these types of aging services organizations in support of LeadingAge Virginia’s mission to expand the world of possibilities for aging.

There is both an important moral case and a strategic business case for creating and nurturing a culture of inclusion. We invite you to explore both and to embrace the benefits that can come to organizations that value diversity, equity and inclusion in all aspects of work and relationships. Valuing diversity, equity and inclusion and integrating DEI into all areas of an organization involves big, important, long-term culture change. The benefits can include increased staff and residents’ well-being and engagement; increased innovation; reduced risks; improved client satisfaction; increased sales and more!

As it is with all impactful, strategic change, it is important to create a vision of a diverse, equitable, inclusive future where all people are valued and included within our organizations. That vision helps us to chart a path to inclusive goals. We share attributes of an inclusive organization in hopes that this might help your distinct organization’s vision to emerge.

Long-term, ongoing, strategic culture change cannot happen in an organization without the full commitment of the CEO, the executive team and the board. And, long-term, inclusive change that impacts the entire organization involves engaging everyone in the organization. Supporting diversity, equity and inclusion must involve everyone: from direct-care team members to all levels of leadership, including the board and executive teams. People from every department need to understand and be accountable for achieving DEI goals. This includes understanding the perspectives of residents, families and care partners, volunteers, and the community.

An organization’s culture includes both explicit practices and unwritten rules, beliefs, feelings, and values. Work experiences and care experiences in aging services organizations may be different base on multiple dimensions of diversity, including race, ethnicity, age, veteran status, sexual orientation, gender type and ability. As part of our discussion on creating and nurturing an inclusive culture, we share a few examples of biases that have been experienced in some aging services organizations; and we suggest organizational policy and practice options that can nurture a culture of inclusion and support disrupting bias.

Finally, we review key policy, practice and procedure considerations that help to sustain long-term DEI change and that support an organization’s culture of inclusion.

Throughout this document, we provide supporting resources for reflection. These are resources that may deepen your understanding of a topic; and some resources are toolkits with assessment tools related to DEI practices for aging services organizations.
Establish a Shared Understanding of Diversity, Equity, Inclusion

It is important to have a shared understanding about what we mean when we say and experience Diversity, Equity, and Inclusion.

**Diversity** refers to the variety of similarities and differences among people, often called diversity dimensions, including, but not limited to: gender, sex, gender identity and expression, ethnicity, race, native or indigenous identity/origin, age, generation, disability, sexual orientation, culture, religion, belief system, marital status, parental status, pregnancy, socio-economic status/caste, appearance, language and accent, mental health, education, geography, nationality, work style, work experience, job role and function, thinking style, and personality type (Center for Global Inclusion, 2021).

![Dimensions of Diversity Diagram](image)

Figure 1: Dimensions of Diversity, Cornell University, Diversity and Inclusion in the Workplace
**Inclusion** is a state of feeling, belonging, and operating in which diversity is leveraged and valued to create a fair, healthy, and high-performing organization or community. An inclusive culture provides equitable access to resources and opportunities for all. It also enables individuals and groups to feel safe, respected, heard, engaged, motivated, and valued for who they are. Inclusion describes the way that an organization structures opportunity, interaction, communication, and decision-making to empower diversity (Center for Global Inclusion, 2021).

**Equity** is about fairness and justice. It is about taking deliberate actions to remove systemic, group, and individual barriers and obstacles that hinder opportunities and disrupt well-being. Equity achieves fairness through the identification and elimination of policies, practices, attitudes, and cultural messages that create and reinforce unfair outcomes. The difference between equality and equity must be emphasized. “Equality” focuses on treating everyone the same, regardless of need and circumstances. Equity achieves fairness through treating people differently dependent on need, circumstance and consideration of historical and systemic inequities (Center for Global Inclusion, 2021).

Figure 2: The Impact of Equity, @2022 Cornell University, DV221-F21
Additional Helpful Definitions

**Intersectionality:** The complex, cumulative way in which multiple forms of inequalities and discrimination a person can experience that compound, overlap or intersect. With an intersectional lens, the emphasis is on the interconnected nature of social categorizations (i.e., class, race, sexual orientation, gender, religion) (Onatario Center for Learning, Research and Innovation in Long-term Care, 2020).

**Person-Centered Care:** With person-centered care, the emphasis is placed on understanding the needs and preferences of the person as a unique individual beyond their medical diagnosis. In person-centered care, the focus is on enabling people receiving care to collaborate with the team and to direct their care planning and provision whenever possible. *This definition also acknowledges the personhood of others in the circle of care, including service providers, family members and students* (Onatario Center for Learning, Research and Innovation in Long-term Care, 2020).

**Person-Directed Care:** Within the culture change movement, there is a shift towards the term ‘Person-Directed Care’, where the emphasis is on the person receiving the care as the director of what, when and how services are provided. For example, residents wake up, go to bed, eat, and bathe when they choose to. Team members alter their work routines to honor residents’ preferences (Pioneer Network, 2023).

**Relationship-Centered Care:** This emphasizes the relationships between the care team, the resident and their family, and focuses on how to enhance these relationships. It also includes community health resources and peer resident support. While person-centered care focuses on the resident and their inclusion, relationship-centered care focuses on strengthening the resident’s associated relationships for the benefit of all care partners (Onatario Center for Learning, Research and Innovation in Long-term Care, 2020).

**Stereotypes:** Generalizations of an individual or a group of people based on incorrect assumptions that everyone in a particular group shares the same characteristics. By doing so, we ignore unique differences among individuals (Onatario Center for Learning, Research and Innovation in Long-term Care, 2020).

**Unconscious Bias:** The attitudes or stereotypes that affect our understanding, actions, and decisions in an unconscious manner. (Virginia Center for Inclusive Communities, 2020)

**Cultural Competence:** The ability to interact effectively with people of different cultures. Cultural competence consists of (1) Awareness of one’s own cultural worldview (2) Attitude towards cultural differences (3) Knowledge of different cultural practices and worldviews, and (4) Cross-cultural skills (Society for Diversity, 2018).
Clarify & Share “Why” DEI is important for your organization

There is a moral case and a strategic business case for organizational focus on diversity, equity and inclusion. Choose DEI because it is the right thing to do and because inclusion can result in great business results.

The moral case is centered on meeting people’s and society’s needs by ending unfair treatment of people. “Making the moral case — saying DEI is right and wearing it on your sleeve — signals that the work of achieving transformational change is rooted in values that are deeply held in the organization and not subject to changes in business conditions” (Beach & Segars, 2022).

Additionally, many successful companies approach diversity and inclusion as a source of competitive advantage. According to McKinsey, the more diverse companies are better able to win top talent, and improve their customer orientation, employee satisfaction, and decision making and this leads to a cycle of increasing returns (McKinsey, 2015). This lens overlaps with the critical importance of matters of social justice, corporate social responsibility, and regulatory compliance. DEI strategies can be essential to an organization’s growth strategy. (McKinsey & Company, 2018).

Since diversity, equity and inclusion can bring enormous benefits to an organization, each organization should develop its own organization specific rationale or business case for DEI and create links to its mission, vision, values and business strategies (Center for Global Inclusion, 2021). The business case may be viewed through multiple lenses and overlapping approaches: being in compliance; building competence; advocating for social justice; honoring dignity; and developing the organization and improving performance.

![Figure 3: Multiple organizational approaches to DEI](Center for Global Inclusion, 2021)
Some reasons why diversity, equity and inclusion are strategically important for aging services organizations include:

- A diverse and inclusive employee base brings a range of approaches and perspectives contributing to innovation and creativity that can drive business success (McKinsey & Company, 2018).

- “There is growing racial and ethnic diversity among older adults, especially as the population of older Black, American Indian/Alaska Native, Latino, and Asian adults increases across the nation” (Virginia Center on Aging, 2023). Nearly 1 in 4 older adults were members of racial or ethnic populations in 2020. People age 65 and older represented 17% of the population in the year 2020 but are expected to grow to be 22% of the population by 2040 (Administration on Aging, 2021).

- According to the Williams Institute, in 2016 an estimated 2.4 million LGBT older adults over 50 lived in the United States, and that number is expected to double by 2030 (Williams Institute, 2016).

- A highly diverse long-term care (LTC) workforce cares for an increasingly racially/ethnically diverse client population. All LTC workers need the skills to care effectively for persons from other racial/ethnic groups and to work effectively with co-workers from different racial/ethnic groups (Bates, Amah, & Coffman, 2018).

- Workforce diversity and inclusion adds different types of knowledge and skills. This can impact competitive advantage and increases an organization’s ability to:

  - Reduce risks associated with lawsuits and negative publicity
  - Decrease costs associated with lower productivity and turnover
  - Save money with diverse suppliers
  - Demonstrate higher return for investors
  - Improve customer satisfaction
  - Capitalize on greater sales
  - Gain an edge over competitors
  - Innovate products and services
  - Strategically prepare for the future

*Figure 4: Value-in-Diversity (Society for Diversity, 2018)*
Create DEI Vision & Strategies

Inclusion describes the way that an organization structures opportunity, interaction, communication, and decision-making to empower diversity. Organizations can be diverse without being inclusive. Being diverse without being inclusive happens when interactions and relationships are structured to include only the predominate group’s perspectives and concerns (Woods & Bormann, 2002) .

Achieving organizational inclusion and leveraging the benefits of diverse ideas and backgrounds involves intentionally envisioning and creating the structures, policies and practices that recognize more than one view and signal the importance of valuing and learning from differences. (Woods & Bormann, 2002)

The attributes of an inclusive organization are listed below. How might these attributes help to inform the vision of structures, policies, and practices needed to support the culture of inclusion in your organization?

Attributes of an Inclusive Organization

Figure 5: Attributes of an Inclusive Organization (Smith & Hughes, 2022)
Three strategic pillars of DEI vision and strategy:

Additionally, three strategic pillars to consider for DEI vision and strategies are: the workforce (the people), the workplace (the culture and environment) and the marketplace (communities, residents, customers). Intentionally consider and evaluate what it might mean for employees, customers and clients, partners, vendors, suppliers and subcontractors if DEI were fully, strategically integrated throughout your organization (Woods & Bormann, 2002).

<table>
<thead>
<tr>
<th>Workforce &gt; Employees</th>
<th>Workplace &gt; Culture</th>
<th>Marketplace &gt; Customers, Residents, Communities</th>
</tr>
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<tbody>
<tr>
<td>• A diverse network of empowered teams, utilizing open dialogue and inclusive work styles</td>
<td>• Equitable systems, processes, policies, programs woven into the talent life cycle to enhance employee engagement, create a sense of belonging and drive performance.</td>
<td>• A diverse workforce and inclusive culture drives innovation and better understanding of customer and community expectations.</td>
</tr>
</tbody>
</table>

Figure 6: The Business Case (Smith, 2022)

Resources for Reflection

- Diversity, Equity, Inclusion & Belonging: Action Toolkit for Operators, First Edition, from The Senior Living Industry DEIB Coalition can be found at this link: [https://content.nic.org/DEIBCoalition](https://content.nic.org/DEIBCoalition) This toolkit shares: additional information related to the case for change for aging services organizations; a DEI organizational maturity model and assessment tool; and helpful guidance on establishing a DEI statement.

- The Commission on Accreditation of Rehabilitation Facilities, CARF International, provides a sample cultural competency and diversity plan that can be downloaded here: [https://www.carf.org/pandemic-cultural-competency-diversity/](https://www.carf.org/pandemic-cultural-competency-diversity/)
Demonstrating Executive Leadership Commitment is Critical

The CEO almost always establishes the level of commitment, the attitude, the pace, and the behaviors related to an organization’s overall inclusive practices (Denver Foundation, 2003).

The most important quality of leaders and organizations that are highly inclusive is the ability to take a long-term, holistic approach to inclusiveness and integrate it into all of the work of the organization. In highly inclusive organizations, leaders and the teams that they assemble are constantly working to be responsive to diverse communities, and they are intentional about working internally with their staff and board to create a welcoming environment and to expand people’s knowledge and awareness of different cultures in multiple ways. Inclusive leaders and their organizations embrace core values of inclusiveness in all that they do (Denver Foundation, 2003).

So, what might the demonstrated leadership of DEI “look like”? Consider the following proactive, progressive and best practice benchmarks from the Center for Global Inclusion (Center for Global Inclusion, 2021):

- **DEI is an essential leadership competency and leaders are rated on it.**
- **Leaders engage in DEI issues important to employees and prevalent in the societies in which they operate.**
- **To increase their knowledge and competence, leaders seek coaching in DEI and provide coaching, sponsoring, and mentoring to others.**
- **Leaders and board members publicly support DEI-related initiatives, even if they are perceived to be controversial or come with personal risk.**
- **Leaders promote DEI initiatives, communicate the strategy, and provide recognition for DEI champions and advocates.**
- **The leadership and board of directors are diverse, engaged in DEI issues, and accountable for achieving the DEI strategy.**
- **Leaders ensure that DEI is systemic, sustainable, and involves cross-functional collaboration.**
- **Leaders take accountability for DEI, help create both a psychologically and physically safe workplace, and accept consequences for their actions.**
- **Leaders take accountability for DEI, help create both a psychologically and physically safe workplace, and accept consequences for their actions.**
- **Leaders are change agents and role models for DEI. They inspire others to take individual responsibility and become role models themselves.**
- **Leaders promote DEI initiatives, communicate the strategy, and provide recognition for DEI champions and advocates.**
- **Leaders are competent in applying conflict resolution skills to resolve DEI-related grievances and challenges.**
- **Leaders are rewarded for demonstrating high competency in DEI.**
Additionally, according to the McKinsey report, “Diversity Matters”, there is a statistically significant relationship between diverse leadership teams and boards and better financial performance (McKinsey, 2015).

Resources for Reflection

- See manager behaviors that foster inclusion in the Appendix.
- The Senior Living Industry DEIB Coalition’s “Diversity, Inclusion, Equity and Belonging Toolkit for Operators” shares two inclusive leadership assessment tools. The toolkit can be downloaded here: [https://content.nic.org/DEIBCoalition](https://content.nic.org/DEIBCoalition)
- The Embracing Diversity: A Toolkit for Supporting Inclusion in Long-Term Care Homes can be found at this link: [https://clri-ltc.ca/resource/embracingdiversity/](https://clri-ltc.ca/resource/embracingdiversity/) This toolkit, developed by the Ontario CLRI’s Supporting Diversity and Inclusion in LTC Advisory Group, has a section for DEI organizational culture assessments for long term care homes that includes questions related to leadership.
- The Commission on Accreditation of Rehabilitation Facilities, CARF International, provides a sample cultural competency and diversity plan that can be downloaded here: [https://www.carf.org/resources/sample-competency-diversity-plan](https://www.carf.org/resources/sample-competency-diversity-plan).
The Board’s Role in DEI Strategy

The role of a board of directors in influencing change is also significant. “Boards of directors can knowingly or unknowingly perpetuate cultures of exclusivity or create highly inclusive board cultures” (Denver Foundation, 2003). Diverse boards can better represent communities, provide valuable perspectives when planning and organizing community engagement and help ensure that the organizational culture is as inclusive as possible.

“To truly embody and govern inclusion, the board should reflect the diversity of [the organization’s] customer base in its composition, create an inclusive culture within the boardroom itself, and integrate inclusive thinking and behaviors into all of the ways that the board operates.”

--Trudy Bourgeois, founder and CEO, Center for Workforce Excellence, Deloitte (Deloitte, 2023)

Jim Taylor, Vice President of Leadership Initiatives for Board Source, suggests that board members ask themselves 5 strategic questions (Board Source, 2021):

1. Is our organization’s reputation being negatively (or positively) impacted by our board’s current composition regarding diversity?
2. If someone were to make assumptions about our organizational values based on our board composition, what would they be likely to think?
3. How well are we cultivating a deeper understanding of the community or communities that we serve and bringing their perspectives, needs, feedback, and priorities into our strategic boardroom discussions?
4. Are we ever at risk of making decisions without fully understanding how these decisions may affect those we serve?
5. If we were to make a deeper commitment to diversity, inclusion, and equity, what would that mean for our mission, our work, and the people we serve?

AN INCLUSIVE GOVERNANCE STARTER LIST

- **Strategy**
  Understand the organization’s current diversity and inclusion environment

- **Talent**
  Educate yourself on inclusion and inclusive governance

- **Governance**
  Begin embedding inclusion into all board processes

- **Integrity**
  With management, concretely define what inclusion means and what behaviors support it

- **Performance**
  Begin prioritizing inclusion as a strategic imperative on the board’s agenda, and monitor relevant metrics

Figure 8: An Inclusive Governance Starter List (Deloitte, 2023)
Create and Nurture An Inclusive Organizational Culture

The culture of an organization includes its explicit strategy, vision, structures, goals, policies and values. The culture also includes: staff and resident shared “perceptions” about the behaviors that are expected and rewarded; stories and unwritten rules; shared history, traditions, assumptions and feelings.

When inclusiveness exists in organizations and on teams, there are:

- Inclusive values supported by Policies, Practices and Procedures
- Shared beliefs that diverse perspectives enhance learning and performance
- Shared understanding of inclusive behaviors expected
- Those beliefs, understandings and values are translated into EVERY DAY norms and behaviors (Nishii, 2021)

An inclusive organization acknowledges the existence of explicit and implicit organizational “culture” and seeks to align culture to support its values and enables the synthesis of the different perspectives in decision-making. (Woods & Bormann, 2002)
• When there is no shared understanding of expected behaviors and values, behaviors can be unpredictable. People make up their own narratives about what is expected and rewarded. Left unchecked, stereotypes and unconscious bias and explicit bias can impact decision making in significant ways.

“The labels we attach to people will influence how we, and others, see them. Stereotypes influence what we encode, what we notice, and what we remember. We end up seeing what we expect to see!”
--Dr. Nishii, @2022 Cornell University, IRLI003

Here are just a few examples of common patterns of unconscious bias that impact groups. These patterns can result from automatic, unconscious thinking (Nishii, 2021):

<table>
<thead>
<tr>
<th>Competence &amp; Leadership</th>
<th>Women and people of color receive lower evaluations of competence when attributes associated with their social group are incongruent with the attributes thought to be required for success in a particular role (for example, women in senior leadership). The notion of “success” tends to be scrutinized more heavily such that more is required to dispel doubt and be perceived as similarly competent.</th>
</tr>
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<tr>
<td>Interpreting factors that contribute to success or failure</td>
<td>The success of “ingroup” members tends to be attributed to ability and failure to situational factors. The opposite happens for “outgroup” members. For “outgroup members”, success tends to be attributed to situational factors and failure is attributed to incompetence. This translates into greater reluctance to appoint an &quot;outgroup member&quot; for an important or visible role.</td>
</tr>
<tr>
<td>Likeability</td>
<td>People tend to dislike individuals who engage in counter-stereotypical behavior. For example, women who voice their opinions or are unafraid to disagree with others are often described as “aggressive,” “pushy,” or “self-interested,” while the same behaviors engaged in by a man are expected and therefore are more likely to be referred to as “leader-like,” “strategic,” or “assertive.”</td>
</tr>
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</table>

Here are a few examples of how bias may impact staff in some long-term care organizations:

• People of color make up one-quarter of the total U.S. workforce and they comprise the majority (59%) of direct care professionals across long-term supports and services (LTSS). Though direct care professionals are majority people of color, by contrast, this diversity may not be reflected in senior leadership or middle management (LeadingAge LTSS Center@UMASS Boston, 2021). People of color have limited opportunities to move up the LTSS career ladders. They are excluded from informal networks, receive less attention and mentoring from peers who have status in the LTSS field, and undergo performance evaluations that reflect common stereotypes and result in discrimination. Those people of color who advance to positions of leadership often find racism and bias in healthcare C-suites, where they receive the clear message that if they want to keep their jobs, they will not rock the boat. Their white counterparts do not hear the same messages (LeadingAge LTSS Center@UMASS Boston, 2021).
• Professional caregivers receive low wages and a high number of direct caregivers rely on public assistance to make ends meet. This speaks volumes about the lack of value that the nation places on this workforce and may be an indicator of systemic racism in the industry (LeadingAge LTSS Center@UMASS Boston, 2021).

• Many non-white nursing aides have experienced racism or regularly hear remarks about their race from residents or clients in long-term support and services settings (LeadingAge LTSS Center@UMASS Boston, 2021).

• A study was conducted by the Department of Gerontology at Virginia Commonwealth University that gathered CNAs’ perspectives of their personal and professional sources of stress, resilience, and well-being. Eighteen CNAs participated in 5 focus groups at four nursing homes. The participants called for change within facility cultures experienced as “disrespectful, inequitable, and contrary to work-life balance” (Amateau, Gendron, & Rhodes, 2022).

Here are examples of how bias may impact elders in some long-term care organizations:

• A recent AARP study found that more than 60% of LGBTQ+ older adults surveyed were concerned about how they would be treated in LTC settings. Respondents expressed fear that they might be refused or receive limited care; be in danger of neglect or abuse; or face verbal or physical harassment, and being forced to hide or deny their identity once again (Sackett, 2018).

• “It is estimated that about 5% of people living in long-term care communities identify as LGBTQ+. However, due to a lifetime of discrimination and continued fear, LGBTQ older adults may stay silent and in the closet upon moving into an LTC community” (LEI Project, 2021).

• The Long-term Care Equality Index (LEI) project surveyed 116 of the largest long-term care organizations nationally. They discovered that only 18% have non-discrimination policies that were fully LGBTQ inclusive and protected residents based on their sexual orientation and their gender identity. Only 36% had non-discrimination policies that were fully LGBTQ inclusive and protected staff based on staffs’ sexual orientation and gender identity (LEI Project, 2021).

It is vitally important to gain awareness of staff and client lived experiences related to inclusion and equity within aging services organizations.

• In order to learn what different groups might be experiencing, consider regularly using tools such as culture of inclusion surveys, engagement surveys, satisfaction surveys, focus groups, dialogues, open-door policies and 360-feedback to learn staff and resident perceptions and actual lived experiences related to DEI within your organization.

• Tools should be culturally sensitive and linguistically appropriate (Center for Global Inclusion, 2021).
The following workplace policy and practice options can help to align explicit and implicit components of an organization’s “culture” to support inclusive values and to help disrupt bias (Borman & Woods, 1998):

- Explicitly state values, behaviors and practices that support the synthesis of divergent perspectives and enhance organizational values.
- Embrace norms and practices that support collaboration, encourage learning from difference and enable the synthesis of diverse perspectives in decision making.
- Continually examine and evaluate processes and procedures for decision making, problem solving, communication, information sharing, interaction, work organization, learning and innovation to ensure consistency with diversity goals.
- Establish the expectation that all employees will respect and uphold organizational values through their behaviors and work practices and develops leadership capability at all levels to promote or reinforce desired norms.
- Provide formal opportunities like annual meetings, training sessions, or town hall meetings which enable every employee to learn about, respond to and align with the organization’s stated values and expected behaviors.
- Leaders establish and sustain accessible, authentic procedures through which all employees engage in continuous reflection, assessment, critique and enhancement of the organizational culture to ensure that it is respectful, open and aligned with values.
- Provide sanctioned networking opportunities that enable employees to engage in a mutually beneficial, continuous learning process regarding their own identities, world views and life experiences and the impact of these on the forms, function and culture of the organization.

"Socio-demographic data is important: capture it, learn from it and share it.”

(Ontario Centre for Learning, Research and Innovation in Long Term Care, 2022)
Resources for Reflection

- Appendix 1 lists manager behaviors that promote inclusion.

- Embracing Diversity: A Toolkit for Supporting Inclusion in Long-Term Care Homes can be found at this link: [https://clri-ltc.ca/resource/embracingdiversity/](https://clri-ltc.ca/resource/embracingdiversity/) This toolkit, developed by the Ontario Centres for Learning, Research and Innovation in Long-Term Care - Supporting Diversity and Inclusion in LTC Advisory Group, has a section on DEI organizational culture assessment practices for long term care homes. There is also a section on promising practices for employee education and training.

- Creating a Diverse, Equitable, and Inclusive Workplace Culture: A Review of the Literature can be found here: [https://ltsscenter.org/reports/DEI/A_Review_of_the_Literature.pdf](https://ltsscenter.org/reports/DEI/A_Review_of_the_Literature.pdf) This document, created by the LeadingAge LTSS Center @ UMass Boston, references assessment tools and additional considerations for creating an inclusive culture.

- Promoting Cultural And Linguistic Competency, Self-Assessment Checklist for Personnel Providing Primary Health Care Services can be found here: [https://nccc.georgetown.edu/documents/Checklist%20PHC.pdf](https://nccc.georgetown.edu/documents/Checklist%20PHC.pdf) This checklist, developed by Tawara D. Goode, National Center for Cultural Competence, Georgetown University, “is intended to heighten the awareness and sensitivity of personnel to the importance of cultural and linguistic cultural competence in health, mental health and human service settings”. (Goode, 2009)

- Stress, strength, and respect: Viewing direct care staff experiences through a trauma-informed lens can be found at this link: [https://doi.org/10.1080/02701960.2022.2039132](https://doi.org/10.1080/02701960.2022.2039132) This study conducted by Gigi Amateau, Annie Rhodes and Tracey Gendron elevates the perspectives and lived experiences of 18 CNAs that participated in 5 focus groups at 4 nursing homes. The research shares how “trauma-informed approaches may promote the well-being of CNAs and disrupt organizational practices that perpetuate inequities” (Amateau, Gendron, & Rhodes, 2022)
Adopt Inclusive Policies, Procedures and Practices

Advancing a culture of inclusion requires intentionally creating the structures, policies, procedures and practices that support valuing the diversity of all stakeholders. It is important to assess existing policies and practices with an equity and inclusion lens. To support the assessment and development of inclusive policy and procedures, best practice benchmarks and assessment tools exist — including tools specific to assessing practices within aging services organizations for inclusivity. In this section, we share information that supports inclusive policies, procedures and practices for staff, residents and community relationships.

REVIEWS AND ASSESSMENTS

For reviews of existing policy and practices and for new policy and practice development, remember to gather the perspectives of staff, residents and the community related to their experiences of inclusion with your organization. Gathering this information helps to ensure that your senior living organization addresses systematic barriers that may be experienced by residents, team members, family members, friends, and volunteers (Ontario Center for Learning, Research and Innovation in Long-term Care, 2020).

For the revision of existing policies consider:

- ensuring the use of inclusive and respectful language;
- ensuring accessibility;
- offering adaptations (i.e., interpreters, translated printed materials, braille, etc.);
- looking for any hidden bias(es) and/or exclusions.
- Do not assume that everyone will have the same capacity to understand a policy (Ontario Center for Learning, Research and Innovation in Long-term Care, 2020).

A few examples of workplace policies and practices where bias may be found

**Performance Evaluations**: Ambiguous and open-ended performance evaluations leave room for personal bias.

**Appearance**: Dress code policies may discriminate against natural hairstyles or cultural clothing.

**Recognition of Different Cultural Holidays**: Most organizations allow time off for Federal holidays. However, a more inclusive policy would acknowledge different holidays celebrated by employees or would offer floating holidays to allow employees to take time off for non-mainstream cultural or religious holidays of their choice.

**Recruitment**: Language used in job descriptions may unconsciously tell people they are not the right fit for a job. Organizations should consider reviewing these job descriptions and standardizing interview questions so all interviewees can present themselves effectively.

(LeadingAge LTSS Center@UMASS Boston, 2021)
Process audits and bias disrupters - resources

- The “Diversity, Equity, Inclusion and Belonging Action Toolkit for Operations” report from the Senior Living DEIB Coalition can be downloaded here: [https://info.argentum.org/deib-action-toolkit](https://info.argentum.org/deib-action-toolkit) This toolkit shares a link to process change shifts to consider, curated from Work Life Law. Considerations to disrupt bias are described for the following processes (as listed in the Work Life Law toolkit related toolkit: Performance Evaluations; Hiring & Recruiting; Assignments; Meetings; Compensation; Flexibility; Family Leave; Hybrid Work; Retention.

- The Society for Human Resources Management (SHRM) shares a Diversity and Inclusion Audit Checklist that can be downloaded here: [https://www.shrm.org/shrm-india/pages/diversity-and-inclusion-audit-checklist.aspx](https://www.shrm.org/shrm-india/pages/diversity-and-inclusion-audit-checklist.aspx) This diversity and inclusion audit checklist includes considerations for the following policies and processes: Selection, Hiring, and Recruitment; Performance Reviews and Promotion; Harassment At Workplace; HR Operations. The section related to HR Operations provides checklist items for mentorship, training, learning and growth, contractors, anonymous feedback, pay structures, and more.

BEST PRACTICE STANDARDS / BENCHMARKS

The Global Diversity, Equity and Inclusion benchmarks (GDEIB) were developed by the Center for Global Inclusion. The GDEIB is a free resource. The GDEIB has a total of 227 benchmarks for 15 categories and 5 levels. And, there are supporting tools and a suggested assessment process is available. These benchmarks are not industry specific. The benchmarks help organizations to: realize the depth, breadth, and integrated scope of DEI practices; assess the current state of DEI; determine strategy, and; measure progress in managing diversity and fostering inclusion (Center for Global Inclusion, 2021).
INCLUSIVE POLICIES & PRACTICES SPECIFIC TO AGING SERVICES ORGANIZATIONS

CARF standards include cultural competency, diversity and inclusion practices

CARF International is an independent, nonprofit accreditor of health and human services, including aging services (CARF International, 2023). The aging services continuum of care accredited by CARF includes: Continuing Care Retirement Communities, Adult Day Services, Assisted Living, Person-Centered Long-Term Care Communities, Home and Community Services, Case Management, Independent Senior Living, Personal Supports Services, Dementia Care Specialty Program, Stroke Specialty Program.

Since 2012, one of CARF’s accreditation standards has included implementing a cultural competency, diversity, and inclusion plan. CARF, in its accreditation process, recognizes that knowledge and response to all aspects of diversity are critical in providing quality services. The intent of the standard (standard 1.A.5) is that each organization:

- demonstrates an awareness of, respect for, and attention to the diversity of the people with whom it interacts (persons served, personnel, families/support systems, and other stakeholders) that are reflected in attitudes, organizational structures, policies, procedures, and services.
- addresses how it will respond to the diversity of its stakeholders as well as how self-awareness, knowledge, skills, and behaviors will allow personnel to work effectively cross-culture in understanding, appreciating, respecting, and responding to differences in beliefs, values, and practices.
- includes the design and delivery of services in a manner that will be most effective given the cultures of the persons served and the local community and that promote comfort, trust and familiarity (CARF International, 2022).

The standard recommends the gathering of demographics and review of those demographics at least annually, to include: culture, age, gender, sexual orientation, spiritual beliefs, socioeconomic status, language, race, and other factors as relevant.

Plus, the CARF standard suggests that the following be considered as part of diversity awareness and knowledge: spiritual beliefs; observances and holidays; dietary regulations or preferences; clothing; attitudes toward impairment or disability; behavioral health; language; how and when to use interpreters; health beliefs; the role of family members in decision making; experiences of bias; attitudes about sexual orientation, gender identity, and gender expression; and overall acculturation (CARF International, 2022).

From Section 1.A. Leadership, 2022
CARF Continuing Care Retirement Community Standards Manual

The organization should include what it has learned about the diversity of stakeholders and actions taken or planned, e.g.:

- How it has considered diversity and inclusion in organizational plans such as the strategic plan and in workforce recruitment, board member selection, community outreach, etc.
- Consideration of diversity and inclusion in person-centered planning
- Modified educational materials for persons served and families/support systems
- Incorporation of spiritual beliefs and practices into service delivery options
- Personnel training
- Changes in experience with services and satisfaction of persons served and other stakeholders
CARF standards recommend that an organization’s cultural competency, diversity, and inclusion plan should address how the organization will respond to the diversity of its residents and community and all other stakeholders; plus, it should share how knowledge, skills, and behaviors will enable staff to work cross culturally to understand, appreciate, and respect differences between cultures (CARF International, 2022).

CARF International provides a sample cultural competency and diversity plan that can be downloaded here: https://www.carf.org/resources/sample-competency-diversity-plan.
**Transform the culture to include “Person-Directed” Care Practices**

The Pioneer Network supports transformation through culture change – from “provider-directed” care to person-directed care practices in nursing homes and assisted living communities. This culture change is “based on person-directed values and practices where the voices of elders and those working most closely with them are solicited, respected and honored. Core person-directed values are relationship, choice, dignity, respect, self-determination and purposeful living.” Resident-directed living focuses on getting to know each resident’s needs, preferences, life story, how they want to live today, and helping to make it happen” (Pioneer Network, 2023).

The Pioneer Network suggests that the following are **key principles of person-directed care models**: (Pioneer Network, 2022): Resident-Directed Life; Being Well-Known; Home Environment And Accommodation Of Needs And Preferences; Family And Community; Leadership And Engagement. They provide a framework that demonstrates the journey that organizations may take when transforming to a person-directed culture model (Pioneer Network, 2023):

![Figure 9: Pioneer Network Continuum of Person Directed Culture](https://www.pioneernetwork.net/artifacts-culture-change/)

The Pioneer Network also provides assessment tools for nursing homes and assisted living communities. The Artifacts of Culture Change for Nursing Homes and Assisted Living Organizations (2 assessment tools) can be downloaded using the following link: [https://www.pioneernetwork.net/artifacts-culture-change/](https://www.pioneernetwork.net/artifacts-culture-change/)
The Long-term Care Equality Index national benchmarking tool

The Long-term Care Equality Index (LEI) Project is a joint project of SAGE and the Human Rights Campaign Foundation. The project promotes equitable and inclusive care for LGBTQ+ older adults in residential long-term care communities. The project has 4 objectives:

1. Ensure foundational non-discrimination protections for residents, visitors, and staff and provide cultural competency training on LGBTQ+ inclusion
2. Demonstrate progress towards inclusion of LGBTQ+ resident care services and support
3. Foster an inclusive workplace by providing LGBTQ+ inclusive employee policies and benefits
4. Demonstrate engagement with and a public commitment to the LGBTQ+ community

The LEI survey tool is the 1st national benchmarking tool for LGBTQ+ inclusion in senior housing and long-term care communities! This assessment tool can be found here: https://hrc-prod-requests.s3-us-west-2.amazonaws.com/thelei/documents/LEI-Criteria-2023_-Final-1.pdf

Benchmark topics in the LEI include considerations for: resident non-discrimination policies; equal visitation policies; employment non-discrimination policies; training in LGBTQ+ resident-centered care; LGBTQ+ inclusive intake forms; LGBTQ+ inclusive relationship intake forms; LGBTQ+ inclusive neglect and abuse policies; grievance processes, sexual orientation confidentiality policies, and more.

Resources for Reflection

Additional resources and reports from the LEI can be found here: https://thelei.org/reports-and-resources These resources include: LGBTQ+ Aging - the Case for Inclusive Long-term Care Communities; and The LEI 2021 Report.
Inclusive program planning, execution and delivery for diverse communities

The US Administration on Aging’s “Toolkit for Serving Diverse Communities” can be downloaded from here: https://www.aarp.org/content/dam/aarp/livable-communities/old-learn/demographics/Toolkit-for-Serving-Diverse-Communities-AARP.pdf

The goal of the toolkit is to provide those who provide aging services with an easy-to use method for providing respectful, inclusive and sensitive services for any diverse community. The toolkit shares a 4-step process for program planning, implementation and delivery of services. The 4 steps are: (1) Assessments; (2) Identifying Resources About the Community; (3) Designing Services; and (4) Program Evaluation”. Each step is supported by a set of guiding questions (US Administration on Aging, 2023).
Manager Behaviors That Promote Inclusion

- Uses inclusive language (e.g., spouse or partner vs. wife or husband)
- Greets people authentically, takes an interest in everyone
- Speaks up when people are being excluded
- Asks who else needs to be in a meeting to understand the whole situation
- Respects confidentiality with regard to information shared
- Links to others' ideas and feelings
- Uses "ouch" and "oops" situations as teachable moments
- Seeks to understand others
- Listens and engages as an ally
- Creates a sense of safety for all employees, partners, and customers
- Creates opportunities for everyone to have a voice and present their views
- When people make mistakes, immediately takes appropriate action to address missteps
- Actively learns about other cultures (e.g., attends events, employee network groups, etc.)
- Mentors' others from different diverse segments
- Encourages and enables others to participate in D&I events and groups
- Leads the team to establish and follow group norms for a safe and inclusive workplace
- Seeks and promotes opportunities for employees to participate in activities where their diversity can add value to the team
- Sets performance goals that support an inclusive culture
- Participates in processes and practices that enable diverse representation in the workplace (e.g., supplier diversity, recruiting, etc.)
- Takes the time to have challenging conversations

*Source: Cornell University, Fostering an Inclusive Climate, Dr. Nishii*
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