



BYOND DIALOGUE

**CODIFYING THE IMPACT OF
FEARLESS
DIALOGUES WORKSHOPS**

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Beyond Dialogue: Codifying the Impact of Fearless Dialogues Workshops

Contents

Abstract5

Key Terms.....5

Executive Summary.....6

Organization Context.....8

Problem of Practice.....8

Review of Literature.....9

 Introduction.....9

 Key Characteristics of Effective DEI.....10

 Behavior Changes that Promote More Inclusive Organizations.....12

 How Funding Positions Organizations of Color to Compete.....14

 Conclusion.....17

Conceptual Framing and Project Questions.....18

 Project Questions.....18

 Conceptual Framework.....18

Project Design.....20

 Data Collection Plan.....20

Quantitative Data Collection and Analysis.....21

Qualitative Data Collection and Analysis.....24

Findings.....25

 1: Clients are highly satisfied with Fearless Dialogues’ workshops and materials.....25

2: Clients experience “radical hospitality” as what makes Fearless Dialogues’ workshop unique.....	27
3: Clients report individual behavior change after Fearless Dialogues’ workshops.....	28
4: Clients experience organizational change after Fearless Dialogues’ workshops.....	31
5: Clients are extremely likely to recommend Fearless Dialogues workshops.....	33
6: Clients are extremely likely to re-engage Fearless Dialogues workshops.....	34
7: Data showed evidence for a targeted needs assessment.....	35
Recommendations.....	36
1. Leverage “radical hospitality” as Fearless Dialogues’ competitive advantage in the market.....	36
2. Develop a survey tool and metrics that assess client experiences across Fearless Dialogues’ workshops in real time.....	37
3. Develop a formal, structured process for a client needs assessment, service alignment, and post-workshop follow-up.....	37
4. Leverage its position as a black-owned and operated organization to meet the needs of marginalized individuals, recruit additional clients, and elevate its platform.....	37
Limitations.....	37
References.....	39
Appendix.....	43
List of Figures	
1. Conceptual Framework.....	18
2. Data Collection Plan.....	18
3. Workshop Impact	25

4. Perceived Behavioral Change.....	29
5. Perceived Organizational Change.....	32
6. How likely are you to recommend Fearless Dialogue to a friend or coworker?.....	33
7. Do you plan to continue engaging with Fearless Dialogues training in the future?.....	34

List of Demographic Tables

1. Gender.....	21
2. Age.....	21
3. Race.....	22
4. Job Title.....	22
5. Region.....	23
6. Sector.....	23
7. Key Coordinator.....	23

Abstract

Fearless Dialogues, a Black-owned, non-profit consulting firm, specializes in change management, leadership development, and a unique approach to fostering workplace diversity, equity, and inclusion (DEI). Amid the current political climate, Fearless Dialogues is preparing to sustain its growth and expand while seeking new ways to articulate its relevance, codify its impact, and market its competitive advantage. This white paper explores the correlation between the effects of Fearless Dialogues workshops and client recruitment and retention. Post workshops, positive impact on clients is conceptualized as a transformation in individual behavior that galvanizes organizational change. The research involved a mixed methods data collection process, including a thirty-one-question Likert-type survey, semi-structured interviews, and small focus groups. The findings revealed a high level of client satisfaction with Fearless Dialogues workshops, largely due to the experience of radical hospitality, which creates a psychologically safe environment for client engagement. Clients reported significant changes in their individual and collective organizational behaviors as a direct result of the workshops. The findings also underscored the need for Fearless Dialogues to strengthen its needs assessment process and service alignment to enhance client retention.

Key Terms: Fearless Dialogues, Workshops, Behavioral Change, Organizational Change, Culture, Leadership, Diversity, Equity, and Inclusion (DEI), Stakeholder Perceptions, Client Retention, Client Recruitment, Radical Hospitality, Needs Assessment, Competitive Advantage, Survey tools, Real-time Assessment, Marginalized Individuals, Black-owned, Black-led, Change management

Beyond Dialogue: Codifying the Impact of Fearless Dialogues Workshops



Executive Summary

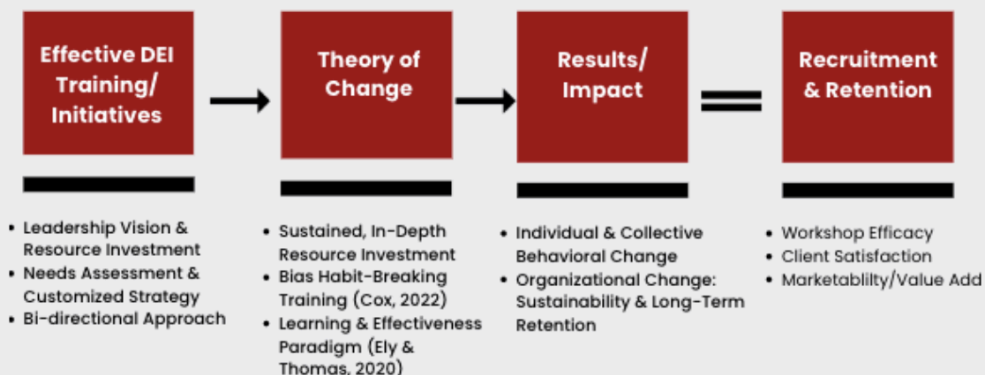
Introduction

Fearless Dialogues is a Black-owned, grassroots, non-profit organization that has evolved into a successful consulting firm specializing in change management, leadership development, and a unique approach to diversity, equity, and inclusion (DEI). Over the last decade, Fearless Dialogues has partnered with clients to foster strong communities that increase workplace equity and inclusion. However, while the organization has sustained itself through word-of-mouth recommendations, it lacks a formalized system to measure the impact of its workshops on participants and client organizations.

Capstone Description

Our Capstone addresses this challenge by examining stakeholder perceptions of Fearless Dialogues' workshops and their impact on retaining existing and recruiting new clients. The goal is to codify the impact of its DEI training so that the organization can articulate its competitive advantage, retain long-term clients, attract new clients, and achieve its organizational goals toward sustainability.

Conceptual Framework



Beyond Dialogue: Codifying the Impact of Fearless Dialogues Workshops

Project Design

This project utilized survey and interview data to answer our primary question and its subquestions:

- To what extent do Fearless Dialogues workshops play a role in recruiting new and retaining existing clients?
 - How do client participants and leaders perceive the impact of Fearless Dialogues workshops?
 - How do curriculum developers, animators, and leadership perceive the impact of Fearless Dialogues workshops on clients?
 - To what extent do these perspectives align?

Findings

We found that clients expressed overwhelming satisfaction with Fearless Dialogues workshops. Notably, the organization's commitment to "radical hospitality" creates an environment where clients feel psychologically safe and empowered. These feelings inspire individual behavioral changes, manifesting more effective organizational shifts towards equity and inclusion. Buoyed by high client satisfaction and meaningful workshop experiences, clients expressed a willingness to re-engage with Fearless Dialogues and were more likely to recommend its services. Despite the apparent success of Fearless Dialogues workshops, the qualitative data signaled opportunities to improve its needs assessment process, how it aligns services to clients' needs, and demonstrates its value add to increase client retention.

Recommendations

- **Leverage its "radical hospitality"** practice as its competitive advantage.
- **Develop survey tools and metrics** to assess client experiences in real-time across its workshops to maximize client retention.
- **Develop a formal, structured process for client needs assessment**, service alignment, and post-workshop follow-up to consider ongoing consultation and development opportunities.
- **Capitalize on its identity** as a Black-owned and operated organization to better serve marginalized individuals, recruit new clients, and enhance its platform.



Organization Context

Fearless Dialogues is a Black-owned, grassroots, non-profit organization that has evolved into a successful consulting firm specializing in change management, leadership development, and a distinct approach to diversity, equity, and inclusion (DEI) workshops. Since 2013, Fearless Dialogues has provided unique spaces for constructive dialogue between unlikely partners. The organization seeks to partner with clients to foster strong communities that increase workplace equity and inclusion.

Fearless Dialogues approaches change by embracing common fears that undermine difficult conversations, leveraging the power of individual stories, and maintaining a steadfast commitment to meeting people where they are. Its clients range from corporate entities and schools to religious institutions and community organizations. A group of diverse facilitators, also called “Animators,” use their expertise to ignite conversation and lead participants through “experiments” that resituate how they see and hear one another to adopt more significant transformational practices of equity and inclusiveness, fostering organizational improvement and meaningful change.

Problem of Practice

Thus far, Fearless Dialogues has sustained itself through word-of-mouth recommendations and the accumulation of individual anecdotes as evidence of the impact of the organization's workshops. Fearless Dialogues' reputation and the reputation of its current executive director led to consistent client referrals for most of its tenure. While this organic growth has been instrumental to the organization's success, it obscured the need for a formalized system to measure the impact of its workshops.

In light of social justice movements over the last ten years, organizations and institutions have experienced a cultural shift toward increasing diversity, equity, and inclusion. Many have established programs and initiatives to address this paradigm shift. Though some organizations have started to make shifts toward DEI, those efforts have been subverted by recent legal rulings and societal resistance (Dyer, 2023; Iyer, 2022; Gares, 2014). Given the current political climate and its tenth anniversary, Fearless Dialogues must prepare to sustain and grow itself while finding new ways to articulate its relevance and competitive advantage. However, despite anecdotal evidence and the program's best efforts, there is no comprehensive outcome data on the effectiveness of its DEI training sessions. Without the ability to codify its influence, Fearless Dialogues will struggle to articulate how the impact of its workshops encourages clients to want to re-engage for a longer period. We hypothesize that if Fearless Dialogues continues to operate without access to these data, it will likely waste resources, lose competitive advantage in the market, and potentially lose its viability.

This capstone will explore stakeholder perceptions of Fearless Dialogues' training and development workshops. The goal is to codify the impact of its DEI training so that the organization can articulate its competitive advantage, retain long-term clients, attract new clients, and achieve its organizational goals toward sustainability.

Review of Literature

Introduction

To support our analysis, this literature review will focus on research in three key areas: effective DEI training and development characteristics, behavioral changes that reflect more inclusive organizations, and the challenges of funding Black organizations. A clear understanding of the key characteristics of effective DEI training and development will help

situate and contextualize the mission of Fearless Dialogues. Furthermore, examining evidence-based best practices will build the foundation for our inquiry, synthesis, and analysis regarding client retention and recruitment.

Fearless Dialogues' workshop activities are grounded in "experiments" that allow participants to see one another differently, hear each other's stories, and consider ways to transform how they operate individually and collectively within their organizations. Understanding how Fearless Dialogues workshops align with the characteristics of successful DEI training outlined in the literature will be critical for assessing their impact. Similarly, the literature will identify behavioral changes that promote inclusivity and ground Fearless Dialogues' experiential approach to encourage individual and collective transformation among workshop participants. Finally, exploring funding for Black organizations carries implications for how Fearless Dialogues may use its impact to recruit and attract new clients as a part of its overall revenue strategy.

This literature review examines the key characteristics of DEI training and development initiatives and the mechanisms that facilitate the transition from professional learning to tangible behavioral changes in the workplace. It also delves into methods for measuring these changes and the behavioral shifts associated with promoting more equitable, diverse, and inclusive practices. Finally, this literature review explores how Fearless Dialogues may leverage its impact data to attract new clients.

Key Characteristics of Effective DEI Training and Development

Research strongly supports the idea that active involvement and engagement from leadership within an organization drives the success of DEI initiatives (Ely & Thomas, 2020; Hite & McDonald, 2006; Hanover & Cellar, 1998). In other words, "trickle down" DEI,

investment at the highest levels of an organization, is shown to cascade throughout the entire entity, creating greater returns. The strong link between leadership commitment and the success of DEI initiatives suggests that effective training requires the guidance and direction of the key decision-makers within an organization. Leaders must own and responsibly drive DEI initiatives to increase the likelihood of successful organizational change.

Although much of the literature communicates the importance of a top-down approach to DEI, some researchers explore the impact of a bottom-up approach. (Impellizeri & Coe, 2021; Gill, McNally, & Berman, 2018). This bi-directional approach adds nuance to the discussion around the precursors to successful DEI initiatives. For example, Impellizeri and Coe (2021) created a specific model of DEI that highlights the dichotomy between levels of influence, organizations (top-down) vs. individuals (bottom-up). Though this model was designed within the limited context of science and publishing, it thoroughly outlines how each direction feeds into a central system of awareness and organizational culture development (Impellizeri & Coe, 2021). An underlying assumption within this reciprocal relationship is the understanding that effective DEI initiatives must permeate multiple levels of influence within an institution. While leadership is key to successful DEI training efforts, the staff's individual and collective actions are critical for successful organizational shifts.

A study by Eddington et.al (2020) found that organizational culture impacts individual agency and stresses the role of leadership in building processes and systems that support DEI. Individuals within an organization may not feel empowered to create change if the environment is not structured in a way that supports enacting the necessary change. For DEI initiatives to take root within an institution, commitment must be present, sustained, and deeply embedded in its operations and culture. Successful DEI work moves beyond the awareness level (Hite &

McDonald, 2006) by engaging participants in active learning (Chavez & Weisinger, 2008) over an extended period (Hanover & Cellar, 1998) for the highest level of effectiveness.

Accordingly, DEI efforts should be tailored to an organization's needs, not reduced to a one-size-fits-all approach (Sarkar, 2022). Evidence shows that customized DEI workshops also foster more profound participant engagement. Organizational needs must be assessed before engaging in plans to integrate DEI into the current landscape. Roberson et al. (2003) identify common organizational controversies associated with DEI training: awareness vs. skill, broad vs. narrow definitions of diversity, whether to use confrontational approaches, homogeneous vs. heterogeneous training groups and trainer demographics. Research indicates that needs assessment bridges the gap between measurement and change. A thorough analysis of the organization, its employees, and its operational capacity is critical to DEI training design (Roberson et al., 2003). Needs assessment is more than a descriptive process that measures where an organization is and where it has been; it prescribes how and predicts whether an organization navigates toward achieving its DEI goals.

Behavior Changes That Promote More Inclusive Organizations

There are many cases for why an organization should pursue greater DEI. Dr. Sherard Robbins notes three cases for diversity, equity, and inclusion: business, legal, and moral (2023). He posits that representation is grounded in the business case for diversity and established to serve an organization's bottom line. The legal case for diversity is steeped in the organization's statutory commitment to Affirmative Action, Equal Employment Opportunity, and anti-discrimination. Finally, the moral case for diversity attends to human and civil rights beliefs. It seeks to serve the organization's people by developing behaviors that promote cultural and

workplace inclusion and a sense of belonging. That said, organizational change towards DEI also requires individuals within the organization to change their behavior.

Ely & Thomas explain, “To make real progress, people—and the organizational cultures they inhabit—must change” (2020). They found that what matters most is how an organization capitalizes on the diversity of its internal and external stakeholders’ identity-related knowledge and experiences to inform how the organization could better perform its core work. Ely & Thomas (2020) coined this approach as the learning-and-effectiveness paradigm and noted four actions that helped managers shift their practice: building trust by establishing psychological safety and encouraging open, honest discourse; actively enacting systematic change through individual and collective learning that dismantles discrimination and subordination; embracing a wide range of voices and perspectives; and observing cultural differences as an opportunity to learn and expand the organization’s knowledge base. Centering the moral case for diversity underscores the research that effective organizations prioritize people over profits (Ely & Thomas, 2020).

Despite its diversity or lack thereof, institutions are comprised of people who bring a myriad of experiences, backgrounds, ethnicities, world views, and biases to the workplace. Research shows that the root cause of most failing DEI training is the execution of a deficit model. This approach seeks to address a perceived lack of knowledge and/or experiences and fill those deficits, thereby inciting widespread defensiveness and demotivation. Through quantitative study and practical experience, Cox (2022) found that empowerment-based approaches to DEI training inspired lasting change within individuals and the institutions they served.

Cox (2022) argues that 15 years of empirical evidence foregrounds bias habit-breaking training as one scientifically validated approach to meaningful DEI training. Essential to this

approach is the idea that breaking a habit requires ongoing effort over time and support to understand individuals' responsibility to ensure that DEI efforts are enduring and self-sustaining. His analysis illuminates the intersection between cognitive behavior change and strategic curriculum design that enlists participants as active, self-motivated agents in the change process. In doing so, workshop participants are centered and taught new tools to navigate the social systems of their organizations to reduce bias and promote more equitable, inclusive workplaces. "The training often helps people make concerns more concrete that have previously been vague or uncertain – content from the training gives employees and employers a common language with which to discuss issues related to bias or diversity, and provides solutions for how to address those issues." (Cox, 2022, p. 1052)

In addition to helping other organizations create inclusive environments, Fearless Dialogues navigates its challenges as an organization of color. Its financial position directly affects its ability to recruit new and retain long-term clients.

How Funding Positions Organizations of Color to Compete

Lu et al. (2019) posit that it may be most desirable for organizations to "establish and maintain multiple funding streams including government contracts, individual contributions, earned income, and so on (Lu et al., 2019)." An organization's revenue strategy determines how it attracts and retains clients, increases client engagement, and develops long-term partnerships. Despite their best strategic planning to diversify revenue streams and secure funding, Black-owned and Black-led organizations face two significant challenges that White-led peer organizations do not. The first challenge is overcoming the biased perception of Black leaders as inadequate. Evidence has shown that discrimination impacts whether clients work with Black organizations and funders invest in Black organizations (Lyons-Padilla et al., 2019).

Research shows there is a false public perception of Black leaders as ineffective, incompetent, and under-qualified. Clients holding biased views may choose to work with non-Black organizations. A study by Lyons-Padilla et al. (2019) supports this perception of inadequate Black leadership. Asset allocators reviewed four firms' "one-pager," a one-page summary of the organization's team demographics, performance history, and fund credentials. According to the study, two identical reports with strong qualifiers and two identical reports with weak qualifiers for funding eligibility were submitted. The difference between the identical portfolios was the leadership of a Black male or White male. Lyons-Padilla et al. (2019) found that funders favored White-led organizations and predominantly White teams. Asset allocators felt no obligation to fund either weaker or stronger performing Black-male-led teams due to their perception of Black leaders as ineffective, incompetent, and under-qualified. These biases limit the number of new clients and funding opportunities for Black-led organizations. Despite minority-owned business enterprises (MBEs) showing higher financial returns for investors and positive long-term change for clients, Black-owned and led businesses are considered risky investments (Bates et al., 2017).

The study by Lyons-Padilla et al. (2019) highlights a second significant challenge organizations of color may encounter: seeking funding from funding organizations. In a recent study, Lee (2023) asserted that whiteness is a proxy for organizational funding. Research shows funder preference for White-led organizations. Lee (2023) also shows that funders are likely to fund Black-owned and led organizations that serve the Black community's needs. Dunning (2022) builds upon research done in the 1970s to expand on this significant challenge for Black organizations seeking funding. According to Dunning, researchers should ask whether grantees experience real financial, political, and organizational freedom to operate and, if strings remain,

whether they do so purposefully and productively. Funders perceive the work of Black-owned and Black-led organizations, and they may not want to upset the status quo with their selection of organizations to fund to protect their future career in asset allocation. However, the goal of many Black organizations rooted in services to the Black community, for example, conducting DEI training, is to disrupt the status quo, the systems of inequality that persist. Hence, when institutions provide grant funding to organizations of color, it often includes constraints on how the funds may be used. Bates et al. (2017) documented a dynamic in which White investors are more likely to fund Black organizations whose work aligns with the investors' interests. This fact demonstrates how financial constraints and stakeholder interests shackle Black organizations. In contrast, White organizations are more likely to receive funding based on their interests rather than that of investors.

For Black-owned and Black-led organizations, expanding their programs or services to include full, mainstream services is to assume risk to both the organization and its funders. Funders may fear that Black-owned organizations cannot raise new capital to secure the investors' return. Funders' careers are at stake should the funding partnership fail. According to Bates et al. (2017), funding organizations that are predominantly racially White are likely to offer a Black-operated organization less assistance and subject the organization to greater scrutiny than its peers. If a Black-owned organization strays from its perceived role of servicing the needs of the Black community, it risks losing credibility with funders. In turn, the decisions of predominantly White funders potentially position a Black-owned and Black-led organization to become a poorly funded organization, and thus limits the organization's capacity to attract new clients.

Conclusion

This literature review aims to outline the most effective components of DEI training, identify how organizational behaviors and change efforts lead to more inclusive work environments, and explore challenges Black organizations face in securing funding. These aims influence how Fearless Dialogues attracts, recruits, and retains new clients.

The literature outlines that investment from leadership is paramount. This awareness affects how Fearless Dialogues vets clients and structures its projects. Additionally, long-term engagement is vital. Fearless Dialogues' ability to secure and retain long-term clients will support its growth as an organization and align with its commitment to facilitating enduring change. Conducting a needs assessment with agile, responsive customization is vital to effective DEI training and initiatives. This context provides a framework through which Fearless Dialogues can evaluate the effectiveness of its practices and align its services with potential clients.

Our focus on behavioral changes and inclusion reflects Fearless Dialogues' approach to its workshops. Its workshops aim to create an environment for participants to consider their organizational roles and how they engage with others to accomplish tasks. Fearless Dialogues posits that organizational change occurs when people see one another, hear each others' stories, and consider what needs to change individually and collectively while championing continuous improvement to accomplish its core work and widen its impact.

Finally, exploring funding for Black-owned and operated organizations reveals a key part of the landscape Fearless Dialogues must navigate carefully to increase its capacity. Discrimination poses an ongoing threat that has the potential to constrain its operations, hinder its efforts to attract and retain clients, limit funding, and shrink its service options. Furthermore,

Fearless Dialogues may be subjected to more scrutiny when working with White funding organizations, which would impact its autonomy.

This project is a resource for Fearless Dialogues to reconsider how it attracts and retains clients as part of its revenue and growth strategies. As a Black-owned and operated organization that consults to inspire organizational transformation, Fearless Dialogues faces hurdles that its White peer organizations do not. At the end of this inquiry, Fearless Dialogues should be better positioned to codify its impact, articulate its competitive advantage, attract new clients, retain clients long-term, and achieve its organizational goals. Therefore, this project will equip Fearless Dialogues to thrive on an unequal playing field.

Conceptual Framing & Project Questions

Project Questions:

To what extent do Fearless Dialogues workshops play a role in recruiting new and retaining existing clients?

How do client participants and leaders perceive the impact of Fearless Dialogues workshops?

How do curriculum developers, animators, and leadership perceive the impact of Fearless Dialogues workshops on clients?

To what extent do these perspectives align?

Conceptual Framework:

Figure 1

Conceptual Framework



Our conceptual framework draws from relevant literature identifying the key characteristics of effective DEI training as organizational leadership: a thorough needs assessment in service of a customized implementation strategy and a bi-directional approach for dissemination. The research overwhelmingly indicates that the unwavering dedication of organizational leadership and the allocation of aligned resources are crucial elements of impactful DEI training. Additionally, a thorough needs assessment that identifies pain points and assesses workplace culture informs workshop design and shapes the organization's broader DEI strategy. Adopting a bi-directional approach to training and development reflects the symbiotic relationship between management and staff, ensuring its efforts toward fostering greater awareness and inclusivity permeate the institution.

Our theory of change is that prolonged, sustained resource investment facilitates implementing bias habit-breaking training (Cox, 2020), thereby bolstering employees' transformation into individual change agents who aim to reduce bias, promote equity, and operationalize inclusion within the organization. To complement DEI training, Ely & Thomas encourage the adoption of a learning orientation toward diversity, equity, and inclusion or a

learning-and-effectiveness paradigm (2020). Such an approach seeks to build trust among staff while actively working against discrimination, embracing a range of voices and perspectives, and drawing on cultural differences as a natural resource. Accordingly, Fearless Dialogues' ability to spark individual behavior changes that manifest organizational change may lead to long-term client retention and strengthen new client recruitment efforts.

Project Design

Data Collection Plan

Figure 2

Data Collection Plan

Questions	Concepts	Data Type	Sample	Recruitment
How do client participants and leaders perceive the impact of Fearless Dialogues workshops?	Effective DEI/Impact/ Cognitive Behavioral change	Client Survey Focus Groups/ Interviews	Representative sample From Client List Sample from responses	Mass distribution of the survey via email (as many respondents as possible) Follow up via email as needed
How do curriculum developers, animators, and leadership perceive the impact of Fearless Dialogues workshops on clients? To what extent do these perspectives align?	Effective DEI/Impact/ Cognitive Behavioral change	Focus Groups	FD Executive Director and COO (purposive), animators, and curriculum developers	N/A

To answer our first subquestion, we collected data from surveys, follow-up interviews, and focus groups. The survey was distributed to client liaisons and workshop participants from Fearless Dialogues' client list. We drafted a recruitment email for Fearless Dialogues to disseminate, including a link to the survey. The survey asked respondents to participate in follow-up interviews and focus groups. Based on survey responses, follow-up interviews and/or focus groups were scheduled.

To answer our second subquestion, we scheduled focus groups with the leadership and staff of Fearless Dialogues. Focus groups and interviews were conducted for the convenience of respondents via Zoom or by phone.

Quantitative Data Collection and Analysis

The survey was distributed to 33 primary contact persons for organizations on Fearless Dialogues' client list through Qualtrics. They were asked to complete it and forward the survey to others in their organization who participated in Fearless Dialogues workshops. The survey received 50 responses. Of these responses, 16 were incomplete and, therefore, omitted from our analysis. This resulted in 34 responses representing at least 17 organizations. Survey data were analyzed descriptively by examining the percentages of respondents who gave various ratings to each survey question.

Demographics

Table 1

Gender	% of Respondents
Male	24
Female	76

Table 2

Age	% of Respondents
18-24	38
25-34	9
35-44	17
45-54	15
55-64	18
65+	3

Table 3

Race	Percentage of Respondents
White/Caucasian	16
Black/African American	66
Hispanic/Latin	8
Asian/Pacific Islander	10
Native American/American Indian	0
Other	0

Survey responses included representation across gender, age, and racial demographics. In terms of gender distribution, females comprised the majority at 76%, while males made up 24%. Regarding age, 18-24 year olds were most represented in the data, constituting 38%. Following this group, 55-64 and 35-44 age brackets were tied at 18%, 45-54 year olds represented 15%, and 25-34 year olds 9%. Only one respondent was over the age of 65 (3%). Of the respondents, people of color were more likely to respond to our survey; Within this group, 66% of respondents identified as Black, Asian 10%, Latino 8%, and 16% as White.

Table 4

Job Title	% of Respondents
Student/Intern	47
Executive Leadership	32
Manager/Supervisor	18
Administrative Support Staff	13

In terms of job titles, almost half of the respondents are student fellowship interns (47%), followed by executive leadership (32%), Manager/Supervisor (18%), and Administrative Support Staff (3%). The length of employment within respondents' respective organizations

varies, with 41% having less than six months of tenure and 35% having more than five years, which correlates to the large number of respondents at the student/intern and executive leadership levels.

Table 5

Region	% Percentage of Respondents
Northeast	41
Southeast	35
Midwest	12
West	6
South West	6
International	0

Table 6

Sector	% of Respondents
Corporate	32
Nonprofit	47
Medical	0
Education	21

The regional distribution indicates a significant presence in the Northeast and Southeast at 41% and 35%, respectively. The nonprofit sector was the most represented at 47%, followed by corporate organizations at 32%.

Table 7

Key Coordinator	% of Respondents
Yes	47
No	53

When asked about coordinating or facilitating Fearless Dialogues services for their organization, 47% of respondents answered Yes, while 53% indicated they were not central to this role.

Qualitative Data Collection and Analysis

The distributed survey included an open-response section where clients were asked to share any additional feedback about Fearless Dialogues' workshops. This question gained 14 responses. Furthermore, of the 34 respondents who completed the survey, 26 were open to participating in focus groups or interviews and submitted their email addresses for follow-up. We reached out to those clients via email to schedule interviews. Our outreach yielded the scheduling of six clients. Interviews with Fearless Dialogues leadership and staff were also scheduled via email. Fifteen semi-structured interviews were conducted in total with three focus groups, including:

1. Survey free responses (N=14)
2. Fearless Dialogues' leadership team (N=8)
3. Fearless Dialogues workshop facilitators (Animators) (N=3)
4. Fearless Dialogues workshop participant survey respondents (N=6)

Interviews were recorded via Zoom and Otterai, which produced transcripts. Those transcripts were uploaded to Dedoose for coding based on emerging themes and identifying support for our quantitative analysis. The codes included themes such as behavioral change, organizational change, experiments/workshops, container/environment, etc.

Findings

To what extent do DEI workshops play a role in recruiting new and retaining existing clients at Fearless Dialogues?

Seven findings emerge from this study based on project questions about perceptions of Fearless Dialogues workshop sessions. We analyzed data from a voluntary survey, open responses, focus groups, and semi-structured interviews.

Finding 1: Clients are highly satisfied with Fearless Dialogues' workshops and materials.

Figure 3

Workshop Impact	
Satisfaction with Fearless Dialogues workshops/training	97%
Ability to understand and apply Fearless Dialogues principles: SEE, HEAR, CHANGE	97%
Clarity and helpfulness of Fearless Dialogues training materials and resources	100%
Would recommend Fearless Dialogues workshops to a friend	97%

Our conceptual framework links client satisfaction to retention. The survey results indicate that many participants engaged with Fearless Dialogues over extended periods. Of the 34 respondents, 62% have attended at least five Fearless Dialogues workshops (85% more than one), with 35% having engaged with Fearless Dialogues for over a year. Regarding the content of Fearless Dialogues' workshops, 97% of respondents expressed extreme satisfaction, with only one dissatisfied respondent. Research shows that a pillar of effective DEI training is long-term

retention. This study shows the correlation between client satisfaction and engagement with Fearless Dialogues.

All respondents reported at least some improvement in their understanding of Fearless Dialogue principles: SEE, HEAR, CHANGE, with 74% noting a great extent of improvement. Similarly, 97% of respondents indicate a significant increase in confidence in applying these principles in their work. The clarity and usefulness of the training materials also received high praise, with all respondents finding them clear and helpful. These findings suggest a strong positive impact of Fearless Dialogues' workshops on participants' understanding, confidence, and application of its principles in their professional contexts. Aiden, an executive, explained his satisfaction with Fearless Dialogues as a service provider and partner in shepherding student interns, "I would rate [Fearless Dialogues'] facilitation and performance as top-tier across all fronts. Their impact on the fellowship set the standard for how our fellows perceived themselves and their ability to make change both within the program and their greater environments. Based on what I've experienced, their core principles and models are unlike any professional development I've seen. They stand out amongst other companies I've worked with by miles. Excited to continue the partnership."

We also found that Fearless Dialogues' Animators, or session facilitators, are key to client satisfaction. A consistent theme from the qualitative data is Fearless Dialogues' ability to create a welcoming and affirming environment not only in the set-up of the physical space but also in the way Animators engage with participants and one another. One client program manager explained, "I think it's the openness of the facilitators, the way that they see everybody. I'm gonna [use] their words. See, Hear, and Change. They really exemplify what they're teaching... they embody it. They are what they bring to the table."

This finding was underscored by the Fearless Dialogues leadership team, who reported that Animators undergo extensive training on facilitating its SEE, HEAR, CHANGE principles and the aligned workshop experiments. Animators are intentionally selected to work with clients based on their ability to lead experiments and connect with client populations effectively. As a result, we identified a strong correlation between high client satisfaction and Fearless Dialogues' workshop environment design, its customized experiments, workshop materials, Animator facilitation, and level of participant engagement.

Finding 2: Clients experience “radical hospitality” as what makes Fearless Dialogues’ workshops unique.

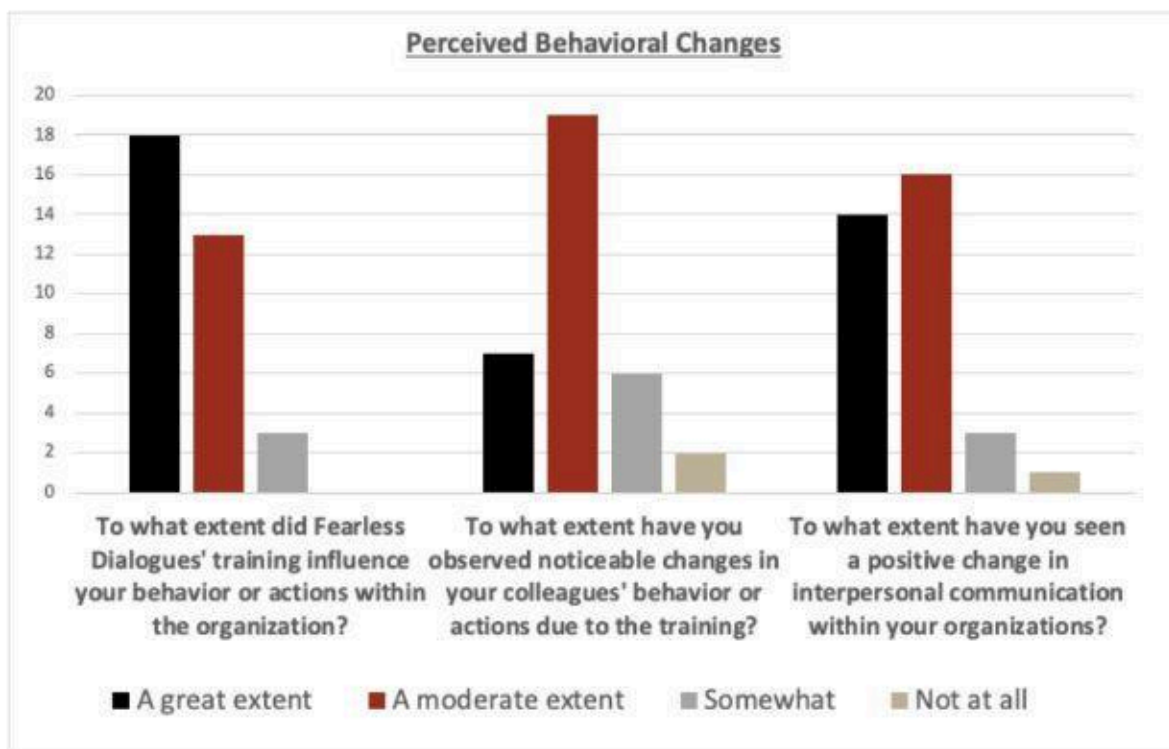
Client liaisons, participants, and Fearless Dialogues’ team highlight “radical hospitality” as a distinctive feature of its workshops, laying the groundwork for individual behavior change. Radical hospitality refers to the engineering of a “holding environment” (Ellison, 2017) where clients feel welcomed and supported to engage confidently in the stressful, difficult conversations that emerge. The Fearless Dialogues team creates intentional spaces where clients feel connection and confidence. This space fosters an environment where clients feel welcomed and empowered to make behavioral changes that lead to organizational change. The process involves an adaptive approach that requires strategic assignment of Animators who can nimbly adjust workshop activities to meet clients' needs. We posit that the workshop environment created by Fearless Dialogues’s commitment to radical hospitality (Ellison, 2017) counteracts the typical deficit model of DEI training that Cox (2022) warns against. In this container, Animators are uniquely trained to guide participants to “fear less” through its workshop pillars: See gifts in others, Hear value in others’ stories, and work for Change and positive transformation.

An effect of radical hospitality is that Fearless Dialogues empowers traditionally marginalized participants to re-envision themselves and others during carefully curated experiential workshops. This yields moments of deep, purposeful connection among participants that usher clients into opportunities for immediate, sustainable, and forward-facing change. Parker, CEO of a non-profit organization that supports Black male youth, credits Fearless Dialogues for transforming how he presents himself as a leader. Despite his title as CEO, he mentioned feeling inferior to others when walking into spaces of power. Fearless Dialogues workshops helped him recognize the power of his own experience and the gifts that he has. Parker went on to explain that this feeling of empowerment is something he wishes to gift to the boys in his program. He stated, “Because of what we do at [organization redacted], I want to make sure that I give Black boys everything because I got everything I wish I had, which is why I gave them the gift of Fearless Dialogues.”

To that end, Fearless Dialogues creates uniquely welcoming environments where clients are open to change. Radical hospitality catalyzes connection through which clients feel empowered to pursue growth through vulnerability.

Finding 3: Clients report individual behavior change after Fearless Dialogues’ workshops.

Figure 4



Fearless Dialogues aims to inspire cultural shifts within client organizations by addressing how individuals see the value in each other, hear the perspectives of their colleagues, and consider what transformation is required for organizational change. Its ability to foster these shifts speaks to client satisfaction and retention. Clients were asked to answer three Likert Scale-type questions measuring their perceptions of individual behavior changes within their organization post Fearless Dialogues workshops.

In response to the first question, “To what extent did Fearless Dialogue’s training influence your behavior or actions within the organization?” a combined 100% of respondents report that Fearless Dialogues workshops influenced their behavior change. 53% of clients noted “a great extent,” 38% responded “a moderate extent,” and 9% “somewhat.” Not a single

respondent reported “not at all.” Given the data, one could conclude that Fearless Dialogues training is directly linked to self-perceived behavioral change among most clients.

Similarly, most respondents observed noticeable changes in their colleagues’ behavior. We asked, “To what extent have you observed noticeable changes in your colleague’s behavior due to the training?” A combined 94% of client participants reported noticeable changes in their colleagues’ behavior, with 56% responding “a moderate extent,” 21% reporting “a great extent,” and 18% “somewhat.” Two respondents, or 6%, noted no observable change after engaging in Fearless Dialogue’s workshops. Qualitatively, Ayannah described specific ways in which she perceived changes in her colleagues: “...this helped us to give folks tools to be more comfortable...I just can't tell you how transformative the work is that Fearless Dialogues does like people do that hard internal work, and they can't help but go out.. they can't help but see people differently. They can't help but hear differently, which ultimately changes them even more. Right? So there's this constant transformation that occurs.”

It’s important to note the data demonstrated that the magnitude of clients’ perceived behavioral change shifted when asked about their colleagues, with most reporting “a moderate extent” as opposed to more than half of respondents reporting a “great extent” as they reflected on their behavior. One explanation for this phenomenon is that the data set may reflect illusory superiority, where due to cognitive bias, subjects are more likely to overestimate changes in their behavior in relation to the behavior of others.

The third question was, “To what extent have you seen a positive change in interpersonal communication within your organization?” Similarly, 97% of respondents reported a positive change, with 88% noting a significant change (moderate to a great extent), 9% “somewhat,” and only one client reported “not at all” after engaging in Fearless Dialogues workshops.

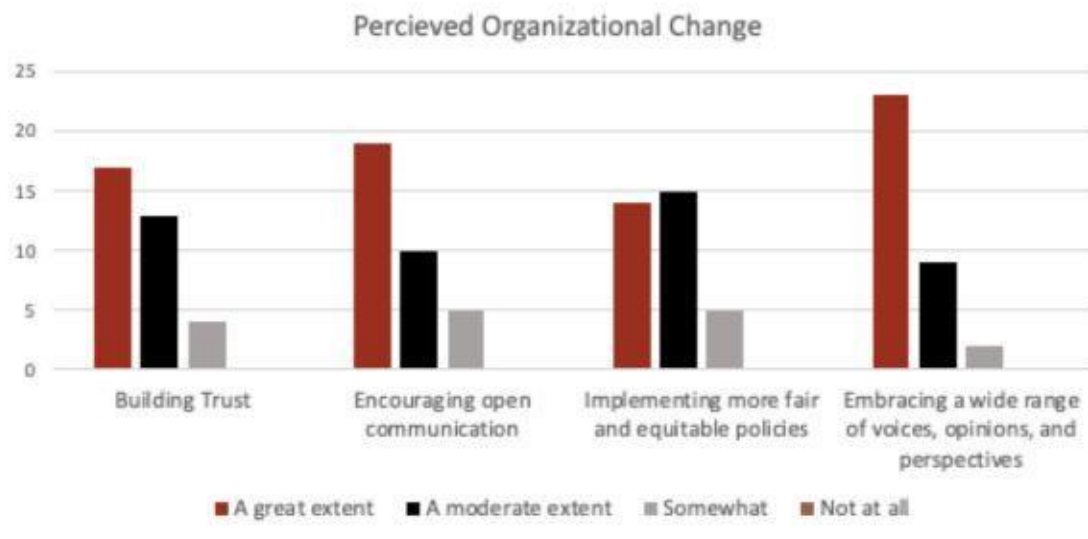
Additionally, as clients reflected on workshop experiences, they reported using Fearless Dialogues' principles and frameworks to guide their interpersonal interactions and life experiences, signaling a lasting change in their behavior toward others. Jared described the Five Hardest Questions (Ellison, 2017) as a model to live his values and a guide for decision-making: "They just [help me to] know more about myself, and sometimes [I] just start asking them to myself. Sometimes the 5 Hardest Questions is just knowing ourselves, and just keep them [in mind] every day as we navigate through life."

Fearless Dialogues' team describes the behavioral changes clients as shared in reflections. "People have given us video testimonials of how Fearless Dialogues helped them move from A to B and helped them become less fearful, more confident in taking on change...or innovate in some way (Earl, FD staff)."

The clients' perception of individual behavioral change within their organizations suggests a direct correlation to or a result of Fearless Dialogues workshops, which guide individuals to manifest lasting behavioral change. Finding three aligned well with Fearless Dialogues Animators and its leadership team, who consider individual behavior change as the primary function of their work and a key driver toward organizational change.

Finding 4: Clients experience organizational change after Fearless Dialogues' workshops.

Figure 5



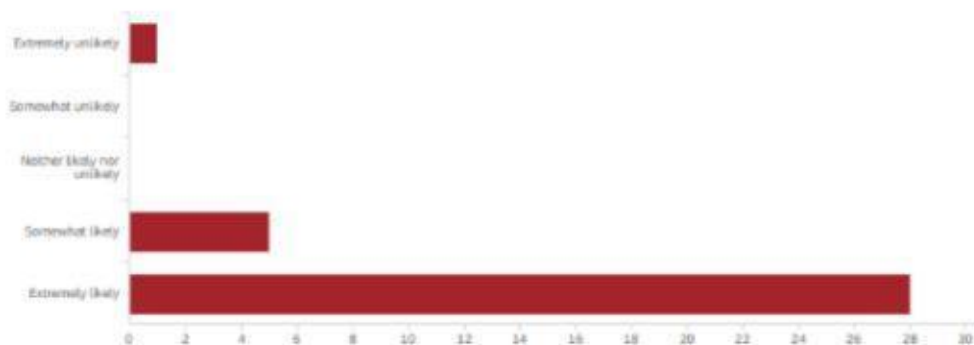
Beyond behavioral changes, respondents reported observing organizational changes in building trust, encouraging open communication, implementing more fair and equitable practices, and embracing various voices, opinions, and perspectives. Notably, 100% of respondents reported observing organizational change related to these four critical elements. No respondents reported observing no change across categories. This finding reflects a key element of our conceptual framework related to Ely and Thomas' (2020) learning and effectiveness paradigm. They describe these elements as the foundation of a learning-and-effectiveness paradigm that motivates individual change agents within an organization. As organizational leaders implement these four elements to transform the workplace, what matters most is how managers capitalize on the diversity of employees' identity-related knowledge and experience and how that knowledge and experience inform how the organization could better perform its core work.

Survey data also indicated that most respondents noted observable changes when asked how they observed the leadership of more equitable and inclusive practices among various organizational levels: executive 97%, manager/supervisor 100%, administrative support staff 100%, and staff 97%. That changes are observable through multiple organizational levels signals that these transformational change efforts are integrated into the fabric of their respective organizations. Investment from the top-down and bottom-up in organizations leads to successful organizational change. One executive underscored Fearless Dialogues' impact on his organization, "Conviction leads to connection. We are better able to connect with each other as a staff because of Fearless Dialogues." Finding four strongly aligns with the bi-directional approach described by Impellizeri and Coe (2021). Additionally, the Fearless Dialogues leadership team posits that one of its primary functions is to help organizations develop shifts in workplace culture. The data bears that out to be true.

Finding 5: Clients are extremely likely to recommend Fearless Dialogues workshops.

Figure 6

3.6 - How likely are you to recommend Fearless Dialogues' training to a colleague or friend?



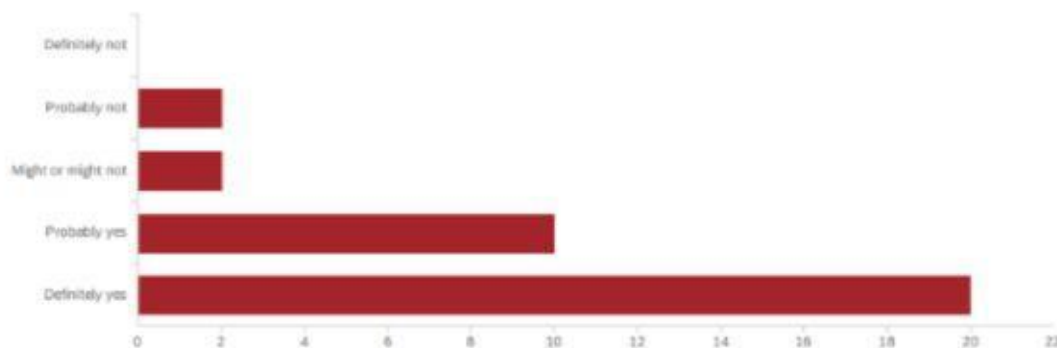
Our conceptual framework links client satisfaction to recruitment. Accordingly, all but one survey respondent said that they would recommend Fearless Dialogues to a friend. A notable quote from a client demonstrates this connection between satisfaction and recruitment: "I was a part of the coordinating group to recommend fearless dialogues because... I just thought [the experiences] were really profound."

The data confirmed that word-of-mouth reflections, the organization's reputation, and the executive director's deep personal connections within the community are pivotal in recruiting new clients. Most of Fearless Dialogues' new clients emerge from previous workshop participants' referrals. Kia, for example, attended multiple workshops and recommended Fearless Dialogues to her new organization. Another example includes Parker, who met Fearless Dialogues' Founder and Executive Director through his work with youth in Atlanta. He stated that Fearless Dialogues has a prominent presence within the Atlanta community: "I don't even know how you can even be in Atlanta really trying to, with all due respect, trying to help kids if you don't have Fearless Dialogues as part of your team."

Finding 6: Clients are extremely likely to re-engage Fearless Dialogues workshop.

Figure 7

3.7 - Do you plan to continue engaging with Fearless Dialogues' training in the future?



Our conceptual framework links client satisfaction to retention. Most clients showed interest in re-engaging with Fearless Dialogues in the future, responding "probably and definitely yes." On the other hand, 12% of respondents were uncertain if they would re-engage, responding "probably not or might or might not."

Finding 7: Data showed evidence for a targeted needs assessment.

Research indicates that needs assessment bridges the gap between measurement and change. Fearless Dialogues reports having a process for assessing the needs of clients. However, qualitative data revealed a misalignment of services and missed opportunities for client re-engagement, indicating potential gaps in effectiveness in Fearless Dialogues' current needs assessment process. For example, one client respondent recalled, "I really appreciated the pre and post-meeting check-ins with organizers (including me). I would recommend Fearless Dialogues [be] specific about [follow-up] training and/or consultations. I think my [organization] would benefit from more specific training if that is something Fearless Dialogues offers." This data points to a potential misunderstanding of Fearless Dialogues' service offerings or a missed opportunity to retain the client for deeper future engagement.

Though most clients expressed the desire to re-engage with Fearless Dialogues in the future, some reported a lack of clarity on how to do so. Kia, for instance, described both a desire for clarity in re-engaging Fearless Dialogues and a more thorough, formal needs assessment before Fearless Dialogues' workshop facilitation. She explained that internal dynamics within the organization were not adequately communicated while coordinating Fearless Dialogues' services. This led to challenges in determining the next steps for potential follow-up services.

"So there was, I think, one framing I offered to Fearless Dialogues when I initially reached out, and then when our head of DEI person got looped into the conversation, I had to pad

a little bit more of like the culture and our needs, ...to not... offend or undermine [my organization's] leadership. So... there is that dynamic at play... those are some dynamics that was [sic] not within...Fearless Dialogue's scope, but I think...we would love to do a follow-up or what are some options out there because there was that energy of... figuring things out on our end and then some...of those dynamics... on our end, sort of a lack of clarity of... how we want to continue this work. So I'll just say..., I think if that was something that we had discussed more on the front end or if I had maybe disclosed that, maybe we could have explored that more (Kia, client).”

The qualitative data from client interviews underscores the power of a structured needs assessment of organizational pain points with tight alignment to service delivery. Additionally, it exposes missed opportunities to evaluate workshop satisfaction metrics, discuss additional service offerings and Fearless Dialogues' value add, and retain the client for longer-term engagements to support the organization's goals.

Recommendations

Overall, the findings indicate that Fearless Dialogues' workshops positively impact clients, leading to individual and organizational changes. However, there may be areas for improvement in how Fearless Dialogues aligns its services to client needs. Thus, we recommend the following:

Leverage “radical hospitality” as Fearless Dialogues' competitive advantage in the market. A consistent theme from the interview data is Fearless Dialogues' ability to create a welcoming and affirming environment. Respondents characterize workshops as a unique "container" of psychological safety where participants can engage with the content /discussions in meaningful, transformative ways.

Develop a survey tool and metrics that assess client experiences across Fearless Dialogues' workshops in real time. The development of survey instruments will position Fearless Dialogues to codify the impact of its workshop experiences and support its clients in evaluating organizational change efforts.

Develop a formal, structured process for a client needs assessment, service alignment, and post-workshop follow-up. Though Fearless Dialogues has an internal system for vetting potential clients and assessing needs, qualitative data indicates gaps in its current processes. For example, clients reported wanting additional engagement but needed more clarity about the extension of services.

Leverage its position as a black-owned and operated organization to meet the needs of marginalized individuals, recruit additional clients, and elevate its platform. One theme among respondents of color was that they initially lacked confidence in engaging across lines of difference due to systemic bias. Respondents further expressed feelings of empowerment after experiencing Fearless Dialogues workshops. This is a unique strength upon which Fearless Dialogues can capitalize.

Limitations

Throughout our research, several limitations emerged. Kennietha, an individual contractor and former Animator for Fearless Dialogues, brought valuable contextual knowledge to our research efforts. However, her previous association with the organization presented challenges, particularly during the interviews. Kennietha abstained from participating in the focus group with the Fearless Dialogues leadership team to maintain objectivity. During the Animator focus group and the interview with Ayannah, Kennietha acknowledged her previous association with Fearless Dialogues and emphasized her role as a researcher. There were

instances in which she refrained from engaging in certain lines of questioning to preserve objectivity. To further mitigate potential bias, we each read “Fearless Dialogues” by Dr. Ellison (2017), the organization’s executive director, to gain greater insight into its work, mission, and vision. This helped our Capstone group norm on biased insider information versus publicly available knowledge.

Another limitation involved recruiting survey respondents. Fearless Dialogues did not allow us to send the survey directly to clients. They opted not to share their client contact information to maintain confidentiality. As a result, our partner distributed the survey to its client liaisons, limiting our ability to track and further analyze the client organizations that received it.

Finally, respondents who volunteered for focus groups or interviews were those who responded favorably to Fearless Dialogues. The few respondents who expressed unfavorable reviews declined to participate in follow-up conversations.

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Appendix

Instruments

Introduction to the Survey

Welcome to our survey on Determining Impact of Fearless Dialogues training sessions on Organizational Change!! We are interested in measuring the impact of Fearless Dialogues workshops. Your responses will be kept entirely confidential. The survey should take you about 10 minutes to complete. Your participation in this research is voluntary. You have the right to withdraw at any point during the survey. The Principal Investigators of this project can be contacted at Katherine Dennis (Katherine.e.dennis@vanderbilt.edu), Kennietha Jones (Kennietha.jones@vanderbilt.edu), and Marschnee Strong (Marschnee.Strong.@vanderbilt.edu). By clicking the button below, you acknowledge: Your participation in the survey is voluntary.

You are 18 years of age.

You are aware that you may choose to terminate your participation anytime for any reason.

There is no compensation for your participation.

Q1.

We are interested in measuring the impact of Fearless Dialogues workshops. Researchers will keep your responses entirely confidential. This survey should take you at most 10 minutes to complete. Your participation in this research is voluntary. You have the right to withdraw at any point during the survey. The Principal Investigators of this project can be contacted at Katherine Dennis (Katherine.e.dennis@vanderbilt.edu), Kennietha Jones (Kennietha.jones@vanderbilt.edu), and Marschnee Strong (Marschnee.Strong.@vanderbilt.edu).

I consent to begin the survey.

I do not consent. I do wish to participate.

Survey:

****Section 1: Demographics****

1.1. Gender:

- Male
- Female
- Non-binary
- Prefer not to say

1.2. Age:

- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65 or older

1.3 Race (check all that apply)

White/Caucasian

Hispanic/Latino

Black/African American

Native American/American Indian

Asian/Pacific Islander

Other

1.4. Which of the following best describes your title at this organization:

Executive Leadership

Manager/Supervisor

Administrative Support Staff

Staff

Student/Intern

1.5. Length of Employment with your organization:

- Less than 6 months

- 6 months to 1 year

- 1-3 years

- 3-5 years

- More than 5 years

1.6. Regional location of your organization

North East, (U.S.)

Southwest, (U.S.)

West (U.S.)

Southeast (U.S.)

Midwest (U.S.)

International: Outside of U.S.

1.7. Sector

Corporate

Non-profit

Medical

Education

1.8. Were you central to coordinating or facilitating Fearless Dialogues' services for your organization?

-Yes

-No

****Section 2: Initial Training Experience****

Think about these Fearless Dialogues Concepts as you answer these questions.

SEE: Seeing the gifts in others, HEAR: Hearing others' stories, and CHANGE:

Transforming how we work

The 5 Fears: Fear of the unknown, Fear of strangers, Fear of appearing ignorant, Fear of plopping, and Fear of oppressive systems.

2.1. How many Fearless Dialogues workshops have you participated in?

- None

- 1

- 2

- 3

- 4

- 5 or more

2.1.A. How long have you been working with Fearless Dialogues?

Less than 1 month

1-3 months

3-6 months

6-12 months

More than a year

2.2. How satisfied were you with the content of the Fearless Dialogues training?

- Extremely dissatisfied
- somewhat dissatisfied
- neither dissatisfied or satisfied
- somewhat satisfied
- extremely satisfied

2.3. To what extent did the training improve your understanding of Fearless Dialogues' principles? (SEE, HEAR, CHANGE)

- A great extent
- A moderate extent
- Somewhat
- Not at all

2.4. To what extent did the training increase your confidence in applying Fearless Dialogues' principles (SEE, HEAR, CHANGE) in your work?

- A great extent
- A moderate extent
- Somewhat
- Not at all

2.5. To what extent were the training materials and resources clear and helpful?

- A great extent
- A moderate extent

- Somewhat

- Not at all

****Section 3: Impact Assessment****

3.1. To what extent did Fearless Dialogues' training influence your behavior or actions within the organization?

- A great extent

- A moderate extent

- Somewhat

- Not at all

3.2. To what extent have you observed noticeable changes in your colleagues' behavior or actions due to the training?

- A great extent

- A moderate extent

- Somewhat

- Not at all

3.3 To what extent have you seen a positive change in interpersonal communication within your organizations?

- A great extent

- A moderate extent

- Somewhat

- Not at all

3.4 To what extent have you observed the following actions within your organization post Fearless Dialogues training?

	A great extent	A moderate extent	Somewhat	Not at all
Building Trust Encouraging open communication Implementing more fair and equitable policies Embracing a wide range of voices, opinions, and perspectives				

3.5 To what extent have you observed the leadership of more equitable and inclusive practices from the following:

	A great extent	A moderate extent	Somewhat	Not at all
Executive Leadership Manager/Supervisor Administrative Support Staff Staff				

3.6. How likely are you to recommend FD's training to a colleague or friend?

- Very Unlikely
- Unlikely
- Neutral
- Likely
- Very Likely

3.7. Do you plan to continue engaging with Fearless Dialogues' training in the future?

- Yes
- No
- Unsure

Section 4: Additional Comments

4.1. Please provide any specific feedback or comments regarding your experience with FD's training.

4.2. Would you be willing to participate in one-on-one or group interviews to discuss your Fearless Dialogues experience? All interviews are entirely confidential.

Yes

No

Maybe, I need more information.

4.3. First Name and Last Name

4.5. Email address (for internal project use only).

Fearless Dialogues–Follow UP Participant Interview

Thank you for agreeing to participate in our research. You were selected to participate in an interview as part of this project. As previously noted, we want to understand your experiences and the impact of Fearless Dialogues training. We value your contribution to helping us better understand factors related to the sessions' impact on your interpersonal interactions in the organization.

This interview will last at least 20 minutes and investigate how you perceive the impact of Fearless Dialogues' training on your professional experiences. Your participation will be kept confidential. Be advised that your participation in this research is voluntary. You have the right to withdraw at any point during the survey. Feel free to contact the Principal Investigators of this project with question or concerns: Katherine Dennis (katherine.e.dennis@vanderbilt.edu), Marschnee Strong (marschnee.strong@vanderbilt.edu), and Kennietha Jones (kennietha.jones@vanderbilt.edu).

Interview Protocol for Focus Groups

Client Focus Group (5-8 people)

Take about a minute to tell us a little bit about yourself and your role in the organization.

(If part of the coordination of services... can you tell us what made you contract with FD)

How many FD training sessions have you participated in? (Round robin, if more than one)

What do you remember most about your FD training session?

Why do you think that memory left such an impression on you?

In what ways did the training session impact how you engage with your colleagues, especially along the lines of difference (thought, racial, ethnicity, physical, organizational function)?

In what ways did you find the FD training session impactful?

Is there anything else you want to share?

Interview Protocol for Focus Groups

Animator/Curriculum Writer Focus Group (5-8 people)

How long have you been animating/writing curriculum for FD? (Round robin)

What's the vision for the work that FD training sessions address?

What stands out most about leading FD training sessions?

What have you observed that makes FD training sessions impactful among participants?

What have FD training sessions taught you about leading/facilitating the learning of others, especially along the lines of difference?

Is there anything else you want to share?

Interview Protocol for Focus Groups

FD Leadership Focus Group (Greg, Ted, Andrea, Julian, Charles)

How long have you been a part of the leadership team? (Round robin)

What are the most frequent reasons (top 3) that clients seek your service?

What is the mission/vision for your work with your clients?

Concerning workshop participants, how does FD define impact?

What have you observed that makes FD training sessions impactful among participants?

In what ways does the variation of session Animation impact its effectiveness? (quality control)

What have FD training sessions taught you about leading/facilitating the learning of others, especially along the lines of difference?

Is there anything else you want to share?