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## DIVERSITY DIALOGUE: Rules of Engagement to Begin Conversations



In July 2020, CFMA's Diversity & Inclusion Task Force (now Committee) was formed to make recommendations on how the Association could build diversity and a culture of inclusion.

The task force held its first call less than two months after the death of George Floyd and four months after COVID-19 was declared a national emergency. Across the country, emotions were high. Many of us had strong feelings — uncertainty, fear, grief, anger, and exhaustion — and we faced challenging conversations with colleagues, friends, and family about our views and how we were navigating this “new normal.”

As committee members joined that first Zoom call, we came with different perspectives and ideas. While some members knew each other well, others met for the first time. Without trust and strong relationships, it felt challenging to be open and honest. Establishing that trust and safety was critical to our mission; without honest conversation, we'd simply have “groupthink” and wouldn't be able to progress to the point of creating meaningful change.

To build psychological safety — the ability to express oneself without fear of negative consequences — we created ground rules for our conversations. When a group creates shared rules and then consistently models these behaviors, it opens the door to more honest and supportive dialogue.

The Diversity & Inclusion Committee started with seven ground rules from Catalyst (a global nonprofit focused on equity and inclusion)<sup>1</sup> and over time, added three more rules. By starting each meeting with these 10 ground rules, or Rules of Engagement, we give ourselves a chance to level-set, put aside emotions or stressors from the day, and remind ourselves of why we're here and how to respectfully engage.

Over the last year and a half, we've started the conversation within CFMA on the importance of diversity and inclusion. Recognizing that these conversations can be challenging, let's start by exploring the Diversity & Inclusion Committee's Rules of Engagement, what they mean, and how they've helped our committee step into the uncomfortable conversations that spark real change.



### RULES OF ENGAGEMENT

#### 1. Assume Positive Intent

Start every conversation by assuming that others have positive intentions. This allows you to tune into your emotions and set aside your own assumptions or biases.

#### 2. Engage in Dialogue — Not Debate

When we debate, we assume that there is a “right” answer, and we tend to focus on “winning.” The goal in a debate is to help the other person see *our* point of view. Instead, when we focus on building dialogue, the goal shifts to understanding the other person’s point of view.

#### 3. Hold Yourself & Others Accountable for Demonstrating Cultural Humility

Cultural competence is the ability to understand other cultures and points of view. Cultural humility embraces the lifelong journey and commitment required to develop that cultural competence. We all start our journey in different places and with different experiences and perspectives.

#### 4. Be Open, Transparent & Willing to Admit Mistakes

Recognize that we will have missteps and may say the wrong things. As Brené Brown states, “Vulnerability is not winning or losing; it’s having the courage to show up and be seen when we have no control over the outcome.” Commit to being vulnerable — show up and lean into the tough conversations.

#### 5. Embrace the Power of Humble Listening

C.S. Lewis wrote that “Humility is not thinking less of yourself; it’s thinking of yourself less.” When we apply humble listening, we put aside our own agenda to show respect, empathy, and trust, creating psychological safety for challenging conversations.

#### 6. Create Trusting & Safe Spaces — Where a Little Bit of Discomfort Is Okay

Psychological safety creates freedom to speak up with ideas, questions, or concerns and creates trust that you won’t be punished or ridiculed for sharing your thoughts. Create safety to have crucial conversations, recognizing that the conversations that matter often feel uncomfortable.

#### 7. Commit to Having Conversations That Matter by Speaking Up to Bridge Divides

During a time when our country feels divided, it’s tempting to avoid the hard topics. We don’t want to damage relationships,

say the wrong things, or offend someone. Instead, engage to create understanding and new perspectives. Be an ally by speaking up when you see bias or discrimination.

#### 8. Suspend Your Right to be Offended

Philosopher and author Mokokoma Mokhonoana writes, “Freedom of speech gives us the right to offend others, whereas freedom of thought gives them the choice as to whether or not to be offended.” In every conversation, you have the freedom to choose how to respond. You cannot control someone else. You can only control your response — your thoughts, emotions, and actions.

#### 9. Look for an Opportunity to be Second

Shift your goal from a desire to win a debate to a desire to understand and learn. Put aside your need to be “right” so you can focus on actively listening, uplifting others, amplifying voices, and supporting your team.

#### 10. Your Voice Is Important — Ensure it Is Heard

Speak up. Your perspectives and experiences give you a unique view on the world. Use your voice to fully engage and create meaningful change.

### CFMA’s Diversity & Inclusion Committee’s Rules of Engagement

- 1) Assume positive intent.
- 2) Engage in dialogue — not debate.
- 3) Hold yourself and others accountable for demonstrating cultural humility.
- 4) Be open, transparent, and willing to admit mistakes.
- 5) Embrace the power of humble listening.
- 6) Create trusting and safe spaces — where a little bit of discomfort is okay.
- 7) Commit to having conversations that matter by speaking up to bridge divides.
- 8) Suspend your right to be offended.
- 9) Look for an opportunity to be second.
- 10) Your voice is important — ensure it is heard.

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## COMMITTEE MEMBER PERSPECTIVES

These rules of engagement have become a critical tool to help CFMA's Diversity & Inclusion Committee build trust and enable stronger relationships. While each ground rule is important, several committee members shared which one(s) they connect with the most and how they're using these ground rules in their own conversations.

"I have a healthy bout of anxiety, and a large portion of my job is mitigating risk; thinking about the worst-case scenario is habitual and hardwired in my brain. Starting each meeting with *assume positive intent* allows me to interact with my guard down, which frees up mental bandwidth to focus on having meaningful conversations instead of looking for potholes. It's not a guarantee that someone won't eventually say something offensive; we work with humans, and humans will inevitably make mistakes.

"It does, however, attach a parachute onto those words so they land softly and can be addressed without damaging a relationship. Assuming positive intent ultimately results in assuming the best of each other, which is great for building trust and strong, resilient teams." — *Brittany Diederich, Director of Finance & Administration, Industrial Builders, Inc.*

"The Rules of Engagement allow me the opportunity to stop, pause, and reflect on the ability to appreciate each person's individual perspective on topics that can be impacted by diversity and help us think through life experiences. Each day, I am going too fast from meeting to meeting (or video call to video call), which can prioritize my own needs. I find I get much more enjoyment and satisfaction watching my team members succeed. The Rules of Engagement help me to 'get my mind right!'" — *Jason Myers, CPA, Partner, BKD, LLP*

"As I reflect on our 10 ground rules, all of them are very important to helping our committee members feel safe and open to discuss tough issues, some that may be very personal. However, the one that connects with me the most is *assume positive intent*. This gives me the opportunity to choose not to take comments personally and not to become defensive. Rather, this helps me first try to understand where folks might be coming from and creates the safety and honesty for me to ask, 'how did you mean that?'"

"In Stephen Covey's *The 7 Habits of Highly Effective People*,<sup>®</sup> Habit 5 is to "Seek First to Understand, Then to Be Understood."<sup>®2</sup> Who we are today consists of all of our exper-

iences from birth to now; this houses all of our experiences and formulates how we think as well as how we process and receive communication. Therefore, assuming that folks' comments are intended to be positive desensitizes my emotions and allows me to attempt to see things from a different perspective. This encourages more meaningful dialogue and helps to keep the focus on increasing awareness and moving toward meaningful change.

"I use this positive intent rule not only when engaged with CFMA's Diversity & Inclusion Committee, but also with my business and personal relationships to increase communication effectiveness." — *Mel BurgEs, CCIFP, Retired CFO, Harcon, Inc.*

"The two rules that resonate most with me are *embrace the power of humble listening* and *look for an opportunity to be second*. I joined up with the committee a little later, so I felt that I needed to prove myself. I quickly realized that I needed to get those thoughts out of my head. These rules of engagement allowed me to keep myself in check, sit back and really absorb others' ideas, and feel comfortable speaking when warranted. In such a tumultuous year, it seems the only thing we have control over is our own self-awareness, self-reflection, and how we treat others. I have the self-awareness to know that I can talk a lot and want to be a fixer.

"The rules of engagement keep me focused on looking for a chance to go second, to try to listen more, and talk less. I know sometimes I fall into old habits, but with the rules on my mind, I can make necessary adjustments and keep trying to do better. I have loved listening to others and asking for clarification on their ideas so I can fully understand what their idea looks like. It has made me a better person already, and I am extremely excited for the unique opportunities the construction industry has in the space of diversity and inclusion work and outcomes. Common sense tells us that if you show up assuming you have something to learn, you will learn something.

"To sum up with a cheesy quote that fits our industry, 'The road to perfection is always under construction.' It is absolutely worth trying and that starts with listening." — *Janeen Butler, CPA, CCIFP, Tax Manager, Conover Asay CPAs, PLLC*

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## LISTEN, LEARN & LEAD

Over the coming months, join CFMA's Diversity & Inclusion Committee as we continue the conversation on how to build a culture of inclusion. We'll share how to listen, learn, and lead within CFMA and your own organizations.



## Rules of Engagement

First, we'll focus on listening by gathering your perspectives and sharing tips on how we can actively listen to each other during crucial conversations. Next, we'll share why a culture of inclusion is important and what these behaviors look like. Finally, we'll offer strategies to help you lead diversity and inclusion efforts within your own organizations.

The Diversity & Inclusion committee will continue to support you by offering personal stories, education, and resources. But you don't have to wait — lean into uncomfortable conversations now, leveraging the rules of engagement (or your own ground rules) to create safety, trust, and meaningful dialogue. ■

### Endnotes

1. "Conversation Ground Rules." Catalyst. October 16, 2016. [www.catalyst.org/research/conversation-ground-rules](http://www.catalyst.org/research/conversation-ground-rules).
2. "The 7 Habits of Highly Effective People.®" FranklinCovey. [www.franklincovey.com/the-7-habits](http://www.franklincovey.com/the-7-habits).

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