

LEADING WITH EQUITY AND INCLUSION

# Emotional Tax in the Workplace

Virtual Instructor-Led Training



**CATALYST**  
WORKPLACES THAT WORK FOR WOMEN

# welcome

Leading with equity and inclusion is a journey, not a destination, and this workshop is designed to support you on this journey. The benefits of inclusion are profound: increased productivity, greater team problem-solving and innovation, higher engagement levels, an overall better place to work, and a positive impact on the bottom line.

In this workshop, you will:

- Understand what Emotional Tax is and its impact on women and men of color.
- Understand the importance of fostering an inclusive workplace and highlighting inclusive leadership in addressing Emotional Tax.
- Listen to and learn from colleagues' personal stories and aspects of their identity.
- Explore and utilize strategies to create an empowering workplace, including: Talk to Me, Trust Me, Stand by Me and Equip Me, and Five Inclusive Communication Skills.
- Overcome common roadblocks to communicating across difference.
- Identify action steps to address Emotional Tax and foster an inclusive workplace.

## ABOUT CATALYST

Catalyst is a global nonprofit working with some of the world's most powerful CEOs and leading companies to help build workplaces that work for women. Founded in 1962, Catalyst drives change with pioneering research, practical tools, and proven solutions to accelerate and advance women into leadership—because progress for women is progress for everyone.

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# Warm Up—Your Identity and You

**Reflect on the following questions:**

1. What aspects of your identity are most salient for you at this time? Why?

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2. How might this differ from what people may first notice about you?

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3. What is your first memory of or encounter with a race, ethnicity, ability, religion, gender identity, etc., different from your own?

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**Conversation Reflection**

1. What did you learn or gain from your group share?

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2. Any surprises?

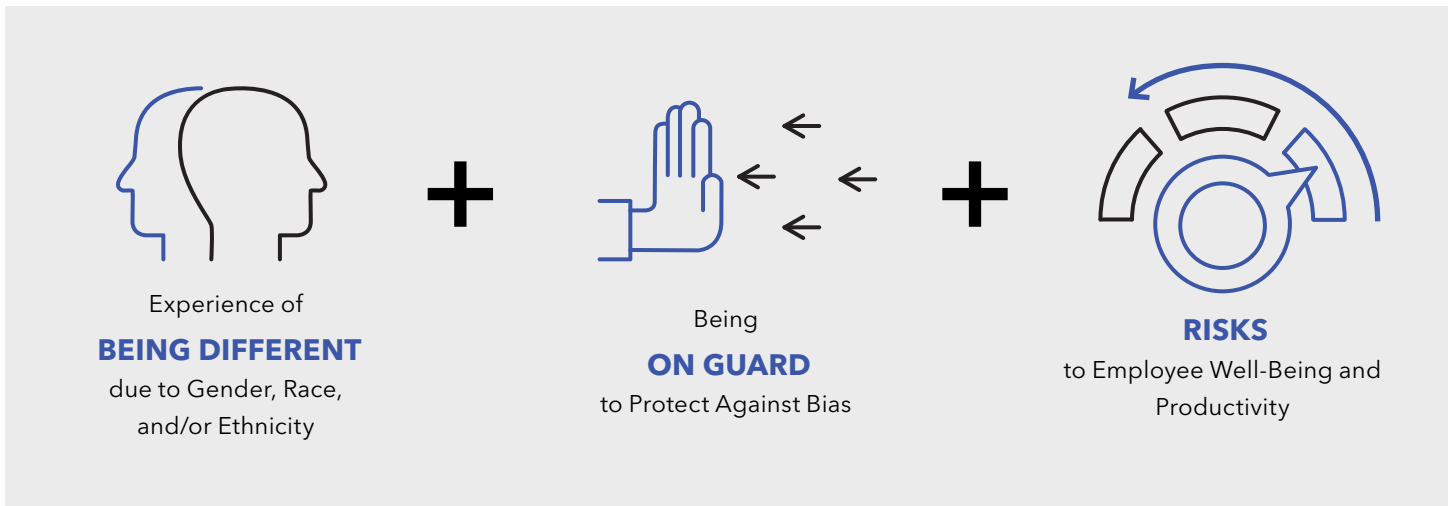
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# Emotional Tax

Emotional Tax is the combination of feeling different due to gender, race, and/or ethnicity; being on guard to experiences of bias; and the associated effects on health, well-being, and the ability to thrive at work.



## COSTS OF EMOTIONAL TAX

### Retention Challenges

**Those who are highly on guard report a dangerously high intent to quit, including:**

- 50% to 69% of Black, East Asian, and South Asian professionals in Canada.
- 29% to 43% of Asian, Black, and Latinx professionals in the United States.

### Threats to Health and Well-Being

**Those who are highly on guard report high rates of sleep problems, including:**

- 22% to 42% of Black, East Asian, and South Asian professionals in Canada.
- 53% to 66% of Asian, Black, and Latinx professionals in the United States.

**Source:** Dnika J. Travis and Jennifer Thorpe-Moscon, *Day-to-Day Experiences of Emotional Tax Among Women and Men of Color in the Workplace* (Catalyst, 2018). Jennifer Thorpe-Moscon, Alixandra Pollack, and Olufemi Olu-Lafe, *Empowering Workplaces Combat Emotional Tax for People of Colour in Canada* (Catalyst, 2019).

# Being on Guard

A state of being on guard—consciously preparing to deal with potential bias or discrimination.

Examples:

- Bracing yourself for insults or nonverbal slights.
- Avoiding certain situations at work in response to anticipated bias.
- Changing your appearance to protect against unfair treatment or discrimination (i.e., “covering” at work).

Reflect on the quotes below by answering the questions that follow. After writing your responses, share your reflections with your group.

“At a diversity summit, I gave a speech that I called ‘I Am Not My Hair.’ When you are trained to be a lawyer, you are not trained to talk about yourself. You’re pretty guarded. I was terrified to get on stage and bare my soul and share what was impactful to me and what had been hurtful to me and what I was optimistic about. It hurt that people would always think I was my assistant. It hurt that I would have to change my hair to be accepted. And I didn’t want that to be the case anymore” –Tiffany Benjamin, Black, female, senior director, Eli Lilly

“At work I’m always processing how much of myself, my true authentic self, I can share. I have to think about, ‘Will anyone find this off-putting?’ ...When I’m looking up the ladder, I’m asking myself, ‘Well, how is this going to play with that person or this person if they find out?’” –Jordan,\* Black, male, director

“[People have underestimated my level in the hierarchy, my skills, or my leadership capacity because of the way I look.] I think it’s a combination of my race, my gender, as well as my stature and size, and how...I actually look visibly younger than most people [my age]. I do watch [how I am] presenting myself....I definitely try not to dress in such a way that I’m not representing that I am actually substantial.... [For example,] I don’t giggle as much if it’s in a workplace situation.” –May,\* East Asian, female, senior executive

1. What themes do you observe reflected in the quotes?

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2. What thoughts or feelings emerge for you in response to the quotes?

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3. What is your experience with being on guard?

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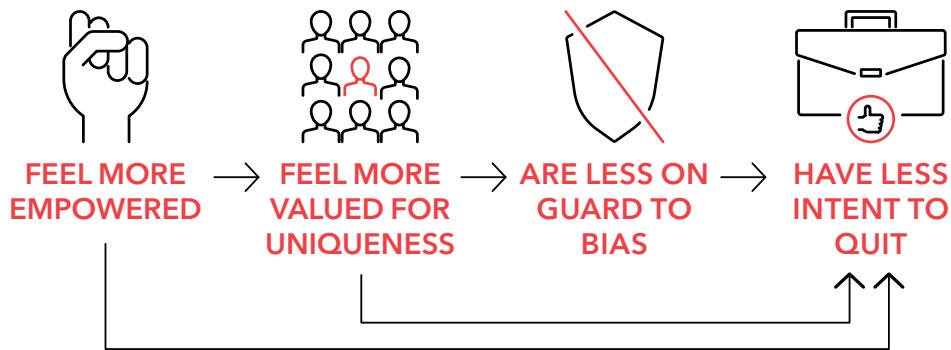
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\*Quotes are from real study participants; the names of individuals have been changed to provide anonymity.

**Source:** Catalyst, Case Study: Eli Lilly and Company—Employee Journeys and People Strategy (January 17, 2019). Dnika J. Travis and Jennifer Thorpe-Moscon, *Day-to-Day Experiences of Emotional Tax Among Women and Men of Color in the Workplace* (Catalyst, 2018). Jennifer Thorpe-Moscon, Alixandra Pollack, and Olufemi Olu-Lafe, *Empowering Workplaces Combat Emotional Tax for People of Colour in Canada* (Catalyst, 2019).

# Empowerment Is Key to Retaining People of Color

**AN EMPOWERING WORKPLACE CAN COMBAT EMOTIONAL TAX AND ATTRITION**



**EMOTIONAL TAX**

The combination of feeling different from peers at work because of gender, race, and/or ethnicity; being on guard to experiences of bias; and the associated effects on health, well-being, and ability to thrive at work.

## NOTES

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Source: Jennifer Thorpe-Moscon, Alixandra Pollack, and Olufemi Olu-Lafe, *Empowering Workplaces Combat Emotional Tax for People of Colour in Canada* (Catalyst, 2019).

# Creating an Empowering Workplace

WHERE EMPLOYEES HAVE THE AUTONOMY, RESOURCES, AND SUPPORT THEY NEED TO SUCCEED.<sup>1</sup>

## TALK TO ME



### WHAT EMPLOYEES SAY

Encourage me and your other direct reports and colleagues to have open discussions of our unique experiences.<sup>3</sup>

### TAKE ACTION

- Inquire across differences: Explore the experiences of others through genuine curiosity.
- Suspend judgment: Actively refrain from adding your own editorial comments or lens to someone else's experiences.
- Demonstrate vulnerability and self-disclose: Acknowledge your shortcomings and share elements of your experience that may feel uncomfortable or risky.

## TRUST ME



### WHAT EMPLOYEES SAY

Trust me to do my work. Give me the autonomy to do my work where and when works best for me.<sup>4</sup> Be confident in my ability to achieve results.

### TAKE ACTION

- Recognize the talents of employees and create opportunities for ongoing development.
- Ensure flexible working arrangements are equally available and accessible to all employees.<sup>5</sup>
- Do not penalize employees who use flexible working arrangements or treat them differently than those who choose not to use them.<sup>6</sup>

## HOW<sup>2</sup>

## STAND BY ME



### WHAT EMPLOYEES SAY

When issues occur, back me up and give me air cover.<sup>7</sup> Focus on solutions rather than blame.

### TAKE ACTION

- Treat missteps and challenges as learning moments.
- Assume positive intent.
- Approach difficulties with a growth mindset, helping employees to develop and improve.

## EQUIP ME



### WHAT EMPLOYEES SAY

Enable me to do my job to the best of my ability. Provide me with the tools and support I need to thrive.

### TAKE ACTION

- Make sure employees have sufficient access to the information and resources necessary to do their job well.<sup>8</sup>
- Ensure employees are kept in the know about all issues that are critical to their job performance.

Source: Jennifer Thorpe-Moscon, Alixandra Pollack, and Olufemi Olu-Lafe, *Empowering Workplaces Combat Emotional Tax for People of Colour in Canada* (Catalyst, 2019).

# How Comfortable Are You Talking About...?

Capture where group members stand in terms of their comfort level discussing particular aspects of their identity and experiences at work. You may also note where your comfort level stands once you've placed your dot on the presentation slide.

## GENDER

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**Very uncomfortable** **Very comfortable**

## RACE

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**Very uncomfortable** **Very comfortable**

## ETHNICITY

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**Very uncomfortable** **Very comfortable**

## WHEN YOU FEEL EXCLUDED

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**Very uncomfortable** **Very comfortable**

## WHEN YOU FEEL INCLUDED

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**Very uncomfortable** **Very comfortable**

1. What do you notice about how comfortable group members are discussing aspects of their identity at work?

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2. Why do you think it is important to discuss our identities at work?

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# Roadblocks to Meaningful Dialogue Across Difference

## WHAT ARE CONVERSATION ROADBLOCKS?



Assumptions, attitudes, or experiences that can stifle our ability to talk about our differences.

Roadblocks often have an underlying motivation—e.g., fear, resistance, emotional fatigue, lack of knowledge, or perceived inability to make a difference.

## THREE THEMES

### THERE ISN'T A PROBLEM

"Gender differences don't matter—we view men and women equally."

"We don't see color—only people."

"Race and ethnicity are not relevant in certain places."

### THERE'S NO BENEFIT TO TALKING

"Talking about our differences can only further divide us."

"Talking won't solve anything."

### THERE WILL BE NEGATIVE CONSEQUENCES TO MY ACTIONS

"People have said they think I'm overly sensitive, and I feel that my experiences are minimized."

"I will say something inappropriate—or worse, be viewed as racist or sexist."

"It's not safe to speak up."

## NOTES

# Five Inclusive Communication Skills



1

## **INQUIRE ACROSS DIFFERENCES**

Instead of shying away from conversations about difference that can sometimes make people uncomfortable, ask questions to learn more about your colleagues' experiences. These conversations can uncover commonalities among people, as well as highlight the differences that make your teammates uniquely who they are. Expressing interest in learning more can make people feel valued and appreciated.

## **LISTEN & ACKNOWLEDGE**

Listening to hear, feel, understand, and empathize with what the person is saying, checking yourself to see if any biases are getting in the way of fully hearing them, and then acknowledging what you hear helps that person feel heard, understood, and valued. Without acknowledgment a person will not know if you heard them well.



2



3

## **SUSPEND JUDGMENT**

It is human to judge. In fact, many of us are hired into our roles because of our ability to critically assess ideas and make the best decisions. However, as an inclusive leader you have a responsibility to suspend judgment and refrain from inserting your opinions when your team members are speaking to you so that you create a space where even if all ideas are not used, they are welcomed. Suspending judgment is a critical way to foster a safe space, which Catalyst research has found leads to increased innovation as well as higher levels of engagement.

## **DEMONSTRATE VULNERABILITY**

Be forthcoming about your own vulnerabilities so that you cultivate a safe environment where others can do the same. Act as a role model by being humble enough and courageous enough to admit what you don't know yet, and demonstrate the work that you are doing to learn from others' perspectives.



4



5

## **SELF-DISCLOSE**

Share your past experiences and reveal your strengths, shortcomings, goals, and challenges. Timely and relevant self-disclosure builds connections and opens the door for others to do the same. Catalyst research has found that disclosing is a key behavior for building trust with diverse groups.

# Talk to Me—Breakout Group

1. Share your responses to the four prompts on page 7:

- How comfortable or uncomfortable are you talking about your race at work?
- How comfortable or uncomfortable are you talking about your ethnicity at work?
- How comfortable or uncomfortable are you talking about your gender at work?
- How comfortable or uncomfortable are you talking about experiencing feelings of exclusion at work?
- How comfortable or uncomfortable are you talking about experiencing feelings of inclusion at work?

2. Explain why you feel the way you do. Consider the impact of your individual experiences, beliefs, team, or organizational culture.

3. Take turns sharing. Use the Five Inclusive Communication Skills to build understanding and connection.

- Inquire Across Difference
- Listen and Acknowledge
- Suspend Judgment
- Demonstrate Vulnerability
- Self-Disclose

## Conversation Reflection

1. What did you gain from your conversation?

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2. What feelings emerged?

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3. Did you encounter any challenges?

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# Stand by Me—Scenarios Role Play

In your breakout room, role play the scenario given to you.

- One person acts as a **manager**, using the Five Inclusive Communication Skills (see below) to back up the team member. Focus more on how you will provide air cover than on the Five Inclusive Communication Skills, if necessary.
- The second person is the **team member** experiencing the challenge in the scenario given to you.
- The third person **observes** and **provides feedback** on the approach and inclusive communication after the manager and team member reflect on how they experienced the role play exercise.

## Scenario A

Alicia, an actuary on your team, is tasked with submitting formulas in a spreadsheet for an important executive meeting. After she sends the file to someone very senior on the executive team, you notice a number of inaccuracies in the formula.

Not long before this incident, you had met with Alicia and she shared with you that she feels unsupported because when others make mistakes they are given a pass, but if she makes a mistake you criticize her harshly. You felt terrible receiving this feedback. She is the only Black person on the team, and you wonder if she is feeling singled out or excluded because of that. You are not sure how to handle this—you want to ensure she is accountable for her work and meeting high standards, but want to be mindful of her feedback, as well as your concern that there may be some bias at play in the way you treat her. How do you respond?

## Scenario B

Dylan, a junior employee and one of two Latinxs on your team, is going to present a new product idea to the senior leadership team, to which you recently were promoted. This is part of a new initiative to encourage junior employees of diverse racial backgrounds to share their ideas. You think Dylan's idea has real potential, but is out-of-the-box and the leadership team—which tends to be cautious and often gets stuck in a group-think mode—will likely not accept it.

You have been with the company for many years, but are still finding your way. While they tend to be conservative, they have also made a commitment to do better at employee engagement after receiving some poor employee satisfaction surveys among racially diverse junior employees. You feel they have a long way to go—in fact, Dylan confided that he is nervous about presenting because he feels people of color are not always heard within the organization. You can see where Dylan is coming from and want to support and stand by him, but are not sure of the best approach given your uncertain footing on the leadership team. What do you do?



# Action Planning Tool

Use this tool to reflect on your key learnings from the session and priority actions you intend to take to address Emotional Tax for people of color and foster an empowering workplace.

EMPOWERMENT BEHAVIORS	KEY LEARNING	PRIORITY ACTION
<p><b>TALK TO ME</b></p> <p><b>What Employees Say</b> Encourage me and your other direct reports and colleagues to have open discussions of our unique experiences.</p> <p><b>Take Action</b></p> <ul style="list-style-type: none"> <li>• Inquire across differences: explore the experiences of others through genuine curiosity.</li> <li>• Suspend judgment: actively refrain from adding your own editorial comments or lens to someone else’s experiences.</li> <li>• Demonstrate vulnerability and self-disclose: acknowledge your shortcomings and share elements of your experience that may feel uncomfortable or risky.</li> </ul>		
<p><b>TRUST ME</b></p> <p><b>What Employees Say</b> Trust me to do my work. Give me the autonomy to do my work where and when works best for me. Be confident in my ability to achieve results.</p> <p><b>Take Action</b></p> <ul style="list-style-type: none"> <li>• Recognize the talents of employees and create opportunities for ongoing development.</li> <li>• Ensure flexible working arrangements are equally available and accessible to all employees.</li> <li>• Do not penalize employees who use flexible working arrangements or treat them differently than those who choose not to use them.</li> </ul>		

# Action Planning Tool

EMPOWERMENT BEHAVIORS	KEY LEARNING	PRIORITY ACTION
<p><b>STAND BY ME</b></p> <p><b>What Employees Say</b> When issues occur, back me up and give me air cover. Focus on solutions rather than blame.</p> <p><b>Take Action</b></p> <ul style="list-style-type: none"> <li>• Treat missteps and challenges as learning moments.</li> <li>• Assume positive intent.</li> <li>• Approach difficulties with a growth mindset, helping employees to develop and improve.</li> </ul>		
<p><b>EQUIP ME</b></p> <p><b>What Employees Say</b> Enable me to do my job to the best of my ability. Provide me with the tools and support I need to thrive.</p> <p><b>Take Action</b></p> <ul style="list-style-type: none"> <li>• Make sure employees have sufficient access to the information and resources necessary to do their jobs well.</li> <li>• Ensure employees are kept in the know about all issues that are critical to their job performance.</li> </ul>		

A large, expressive red brushstroke graphic that serves as a background for the text. It consists of several overlapping, horizontal strokes of varying lengths and thicknesses, creating a textured, painterly effect. The color is a vibrant, slightly muted red.

**APPENDIX**  
**research**  
**and resources**



## Research

Dnika, J. Travis, Jennifer Thorpe-Moscon, and Courtney McCluney, *Emotional Tax: How Black Women and Men Pay More at Work and How Leaders Can Take Action* (Catalyst, 2016).

Dnika J. Travis and Jennifer Thorpe-Moscon, *Day-to-Day Experiences of Emotional Tax Among Women and Men of Color in the Workplace* (Catalyst, 2018).

Jennifer Thorpe-Moscon, Alixandra Pollack, and Olufemi Olu-Lafe, *Empowering Workplaces Combat Emotional Tax for People of Colour in Canada* (Catalyst, 2019).

Dnika, J. Travis, Jennifer Thorpe-Moscon, and Courtney McCluney, *Emotional Tax: How Black Women and Men Pay More at Work and How Leaders Can Take Action* (Catalyst, 2016).

Catalyst, *Engaging in Conversations About Gender, Race, and Ethnicity in the Workplace* (2016).

Dnika J. Travis, Emily Shaffer, and Jennifer Thorpe-Moscon, *Getting Real About Inclusive Leadership: Why Change Starts With You* (Catalyst, 2019).

## Infographic

Infographic: How and Why to Create an Empowering Workplace

## Videos

Emotional Tax

Experiencing Emotional Tax

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