

MILLENNIUM— Leadership Capsules for the 21st Century

Capsule #7— In Compliance

Facilitation and Self-Study Guide

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Looking to the Millennium

I remember 1970. I had just graduated from high school and was getting ready to head off to university. Leaving home seemed a wonderful adventure and I was filled with awe at the opportunities and anxiety at the uncertainty. I remember thinking how significant it was that this huge milestone in my life had fallen at the beginning of a new decade.

I also remember thinking that in 3 more decades—an eternity, it would be the end of the millennium. I thought of how funny it would be to be part of the graduating class in the year 2000. What would they be called? The class of zero?

And now, here we are. Eternity didn't really take very long at all. But in those thirty years it seems that everything has changed.

We used to pop popcorn on the stove. My children find this idea fascinating. “Why didn't you use the microwave?” they ask. We all worked in office buildings or factories. Now many of us run businesses in our homes or telecommute. We used to get a job and keep it forever. In 1970 people in the United States were amused by the little cars coming out of Japan and derided their quality. In 1970 there was no CNN. In 1970 there was no cellular telephone industry. In 1970 no one owned a home computer. A Macintosh was an apple—the kind you eat. The world was clearly divided into the good guys (us) and the bad guys (remember the m?).

A millennium feels like something really big. Historically, that's been true. In the first century, paper was invented in China. It has taken 2000 years for us to develop a better medium for recording information. Around the same time, the city of London was founded by the Romans. Events happened of such tremendous historical and spiritual consequence that they still have a profound impact on our lives today.

So it is with those familiar feelings of awe at the opportunities mixed with anxiety at the uncertainty of it all that I look ahead at the millennium on whose doorstep we stand. Things will be profoundly different. They already are. Changes in how we do what we do happen at speeds that are mind-numbing.

Our organizations face these same forces. They are scrambling to redefine themselves so that they will remain relevant in a world that is in a state of constant, rapid flux. Charting the course, setting the mission, sharing a vision, opening to new learning have become the key skills that leaders need. But what does that mean on a day to day basis? How does being a LEADER change how you hire people? Or fire people? Or provide feedback? Or coach your team?

We need to create bridges between where we are coming from and where we are going. That is the purpose of this series. MILLENNIUM—Leadership Capsules for the 21st Century is 7 short bridges linking management functions and leadership skills. Each 15 minute capsule is a thought provoking discussion of the issues managers, supervisors, team leaders and others playing a leadership role in their organizations face daily. They can be used as part of a comprehensive learning experience or as refresher material to revisit concepts already explored. They can be presented in a facilitated classroom setting or as part of a self-directed study program. They are versatile tools designed to support a wide range of learning situations.

In my collaboration with a team of extraordinary leaders, I've learned a tremendous amount while producing MILLENNIUM. I hope you will find the series as rewarding to work with as I have.

A handwritten signature in black ink that reads "Robt Rosell." The signature is written in a cursive, flowing style with a large initial "R" and a prominent "P" in the second name.

Robert Rosell
Producer

How to Use this Guide

Program Format

MILLENNIUM—Leadership Capsules for the 21st Century contains seven different programs :

- #1 Leadership Is . . .
- #2 The Leader as Coach
- #3 The Leader as Mentor
- #4 Providing Performance Feedback
- #5 Beginning Employment Relationships
- #6 Ending Employment Relationships
- #7 In Compliance

The material in the MILLENNIUM capsules looks at the practical skills that are necessary to be a leader in today's complex and ever changing world. It introduces viewers to the all-important notion that each of us, at one time or another, no matter what our position in an organization, must be leaders in the 21st century. Throughout the series, experts provide us with practical ideas about leadership, and help us prepare for the realities of leading in the next millennium. The material in this booklet supports the video capsule you will be using.

Using the Guide

The material in MILLENNIUM is complex and requires a good amount of reflection, and a willingness to practice known and new skills. For that reason each of the booklets is divided into three parts:

- Part One Reflecting on the Material Covered in the Leadership Capsule
- Part Two Discussing the Capsule
- Part Three Working with the Material Presented in the Capsule

The support material can be used in three different ways: for self-study, for team presentation and discussion, or for direct facilitation.

Self-Study Approach

If you are using this material for self-study, the best way to benefit from the topic being covered is to turn to Part One of the booklet and complete the exercises. Most of the exercises presented help you explore the topic through your own experiences and ideas. Continue with this approach by viewing the entire video capsule. Following the video, reflect on the questions in Handout 5 of the Guide, comparing your own ideas with those expressed by the experts in the video. You may prefer to continue by reading through Part Two, which is a synopsis of comments presented in the video. Move onto Part Three and complete the exercises.

Team Approach

A team would do best by following the self-study method outlined above. Each team member could individually complete the exercises presented in Part One, and then view the video together. Following seeing the video, the team could engage in a discussion of the material. This discussion can be facilitated by the questions and responses offered in Part Two. The team can elect to complete the follow-up exercises and activities in Part Three individually or as a group.

Facilitation Approach

If the MILLENNIUM series is used as a training, the method of how to use this book would vary slightly to those outlined previously. The facilitator of the training should view the video capsule first. Following the viewing of the video, (s)he can review the exercises in Part One. A decision can be made about how or if any of these exercises would be incorporated in the training presentation for the capsule. As a part of constructing the training design, the facilitator can elect which questions would be used for discussion. These can be found in Part Two. In the same way, the exercises offered in Part Three can be reviewed, and a decision made as to which ones would be incorporated into the training.

All exercises, activities, and discussion questions are sequentially presented to follow the presentation of the material in the video capsule. All printed materials for all three formats is contained in this booklet. Handouts for participants are located throughout the booklet.

The only additional materials needed for exercises and activities are either a black or white board or flip charts for writing observations or recording information from brainstorming or other activities.

Discussion Questions for the Capsules

A list of discussion questions is presented in the booklet. This page can be copied and distributed to participants when the program is being used for training. Part Two contains a summary of material covered in the program as it relates to these questions.

Handouts and Photocopying Rights

Handouts pages that are part of the training are located throughout the program booklets. There are approximately three to five activities contained in “Part Three: Working with the Material” section of each program booklet. Trainers need only to decide which of the activities and exercises would be relevant for individual distribution, and have copies made. With the purchase of the MILLENNIUM—Leadership Capsules for the 21st Century series, Quality Media Resources, Inc. grants you license to make as many copies of this guide or the handout pages as you need for your organization. However, copying the videos is illegal.

Bibliography for MILLENNIUM

The bibliography includes works that relate to leadership and working in the 21st century. It is not a definitive list, but rather is intended to assist individuals or teams of workers who are interested in expanding their understanding and knowledge about leadership, and related leadership topics for the 21st century workplace.

MILLENNIUM—

Leadership Capsules for the 21st Century

Capsule #7—In Compliance

Part One: Reflecting on Compliance Issues

The last capsule in MILLENNIUM, “In Compliance,” covers the following concepts:

- Reviewing the meaning of Equal Employment Opportunity.
- Determining the nature of Affirmative Action.
- Defining diversity as it relates to the workplace.
- Defining the nature of protected classes.
- Synthesizing the components of workplace harassment.
- Reviewing the characteristics of The Americans with Disabilities Act.
- Discerning the nature of discrimination.
- Discovering the role of leadership regarding compliance.

Reflecting on Personal Ideas

When it comes to investigating the issues around which diversity and leadership are built, it is impossible to avoid taking a very close look at law. Law reflects the history of a country, it responds to and interprets its culture and takes a stand on its value structure. Law is the mirror of our past and a prism to our future. “In Compliance” is about the law. As you work through the following pages you may discover that you know much more about law than you realized. The exercises have been designed to help you explore the law more generally, and then to move you into more specific and problem-solving areas.

Equal Employment Opportunity and Affirmative Action Defined

Handout 1

We often confuse the concepts of Equal Employment Opportunity, Affirmative Action and Diversity. What do these concepts mean to you? How are they the same? How do they differ? Write your responses below and then check them against the definitions provided on page 12 of this guide.

Equal Employment Opportunity

Affirmative Action

Diversity

Equal Employment Opportunity Law Quiz-Handout 2

- | | True | False |
|---|--------------------------|--------------------------|
| 1. An employer can be found guilty of discrimination even though the employer did not intend to discriminate. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. An employer is liable for a supervisor's unlawful discrimination even though it did not know about it. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Supervisors are never personally liable for discrimination. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. You may refuse to hire an applicant because she is pregnant. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. If an employee files a complaint about you, you can privately set the record straight and warn him/her. | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. As long as you treat everyone the same, you can't violate the discrimination laws. | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. You cannot consider an applicant's arrest record in deciding whether to hire him/her. | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. You can refuse to hire someone over 70 years old because of age. | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. If a job requires occasional overtime, and an employee cannot work overtime on Friday evenings for religious reasons, you do not have to hire him/her. | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. You may refuse to hire an employee just because she has a foreign accent. | <input type="checkbox"/> | <input type="checkbox"/> |

1. True. If an employer has a neutral practice (e.g., an educational, height, or strength requirement) that adversely impacts people in a protected class, and the employer cannot show that the practice is job-related and required by business necessity, the employer can be guilty of discrimination even though it did not intend to discriminate.
2. True. An employer may be liable for the activities of a supervisor it did not know about.
3. False. While most federal courts addressing the issue have held that individuals are not liable for discrimination under Title VII of the Civil Rights Act of 1964, supervisors may face liability under other federal and state laws prohibiting discrimination.
4. False. Pregnancy discrimination is prohibited by federal law.
5. False. This could be viewed as unlawful retaliation.
6. False. For example, the law requires that you give special treatment to qualified employees with disabilities so they have equal opportunity to perform the essential functions of their jobs.
7. True. You may consider a *conviction* record if the convictions are related to the person's ability to perform the job in question.
8. False. The Age Discrimination in Employment Act protects employees from discrimination because they are 40 years or older. There is no cap.
9. False. The law requires that you make reasonable accommodations for an employee's religious practices unless it would be an undue hardship to do so.
10. False. You cannot discriminate against an applicant simply because (s)he has a foreign accent, unless you can establish that this requirement is job-related and required by business necessity.

Who is Protected?

Handout 3

Both federal and state laws protect individuals from employment discrimination based on their status in a “protected class.” List the classes of people protected under these EEO laws.

We are all in two or more of these classes. In which classes do you fall?

Protected Classes

The following classes are protected from employment discrimination under federal and many state laws:

- race (African-American, Hispanic, Caucasian, American Indian, Alaskan native, Asian)
- color
- sex (both men and women)
- national origin
- religion
- pregnancy
- age (40 and older)
- disability (including AIDS)
- veterans (disabled and Vietnam era)

In addition, under some state and/or local laws, it is unlawful to discriminate based on a person’s sexual orientation.

Everyone is protected from employment discrimination based on their race, color, gender, national origin, or religion. Thus, for example, a United States employer could not decide to hire only women because this would be unlawful discrimination against men.

Exploring Prejudices

Handout 4

A prejudice is a preconceived notion that we hold about an individual because (s)he is in a particular group or class.

1. List examples of the stereotypical notions that society holds about individuals in the following groups:

- African Americans:

- Hispanic Americans:

- Caucasian men over 40:

- Asian Americans:

- Women:

- Persons with disabilities:

2. Answer the following questions:

- What is the origin of these stereotypical notions?

- How might these notions impact a manager in making employment decisions?

- How can a manager avoid letting stereotypical notions impact his/her employment decisions?

Part Two: Watching the Video Capsule

Watch the video in its entirety. The questions below have been provided to help you center a discussion around the concepts it presents. When necessary, restructure and add to the questions in order for the discussion to best suit your own organization.

1. What is EEO?

Equal Employment Opportunity (EEO) is federal law, and it is based on the principal that we should not consider a person's status in a protected class in making an employment decision. It means equal employment opportunity for everybody. It is a legal process with rules and regulations.

2. What is Affirmative Action?

Affirmative Action is a federal ruling with a goal to create positive and effective actions that further equal employment opportunity, and to address current and past discriminatory practices. Affirmative Action is a positive step—an extra effort ensuring that women and people of color receive an opportunity to compete on a level of equality.

Affirmative Action may be considered the opposite of equal employment opportunity in the sense that we will consider a person's race or gender in making an employment decision.

3. What is diversity?

Diversity is the inclusion of all people regardless of gender, race, age, ability, sexual orientation, marital status, language or religious practice. Diversity is a business oriented practice that values these differences so that the organization can be the best that it can be.

4. What are protected classes and what are they protected from?

Protected classes generally means people who have been excluded in the past. This usually means that there should be no discrimination based on race, color, gender, national origin, religion, age (over 40), disability, or being a Vietnam veteran. In some localities or states there is also protection based on sexual orientation.

5. Are there different types of discrimination?

There are three types of discrimination:

- Disparate treatment
- Disparate impact
- Retaliation

6. What is disparate treatment?

Disparate treatment is discrimination against an individual because (s)he is a member of a protected class. An example of disparate treatment might be that a company is looking for a certain image, and then only hires young people.

7. What is disparate impact?

Disparate impact is where a person can be guilty of discrimination without having even intended to discriminate. A situation where an employer has what is apparently a neutral job criterion that has an adverse impact on people in a protected class. When challenged, the employer can't show that the criteria is job related or that it was truly required by business necessity. An example of disparate impact might be a rule that requires all security guards to be six feet or taller. When employers are challenged regarding such a law the responses usually do not relate to day to day job performance.

8. What is retaliation?

Retaliation is another form of discrimination. Retaliation occurs when an employee is discriminated against because they have engaged in a protected activity. An example might be if someone called the Environment Protection Agency informing them of unsafe conditions, and this is held against him/her by a manager who finds out.

9. What is harassment and what must be done to avoid it?

An extension of the EEO concept is that not only should we not discriminate against someone because of their race or their gender, but we ought not to harass people based on their race, gender, religion or their age.

In sexual harassment we are talking about quid pro quo, meaning exchanging sex for a promotion or a good work assignment. The other kind of sexual harassment is called a hostile environment. A hostile environment exists when there are three elements present:

- There is behavior that is sexual in nature or gender based (or in the case of racial harassment, race based).
- The behavior must be unwelcome to be considered harassment.
- The behavior must be pervasive or severe.

Harassment is not an isolated incident, a vulgar comment, an offensive remark. It is the situation where an employee on a regular basis is subjected to inappropriate, unlawful behavior.

In the work environment harassment can come from customers as well as from employees. The manager's or coach's responsibility is to ensure that the environment is free of harassment whatever that source may be.

Employers have created harassment policies to affirm that they are an anti-discriminatory environment, that people are treated fairly, and are respected, not only on the basis of gender or sex, but on the basis of race or other differences. It is important to have a policy, and to put some teeth behind it in the form of training and education, and to have some real consequences in place for violation of that policy.

10. What is the ADA and what does it require of employers?

The Americans with Disabilities Act added another protected class to the law—the class of those who are disabled. The law says that you cannot discriminate against someone because they are disabled. An example: A person cannot refuse to hire someone simply because they are blind. The law also requires that a person with a disability be extended any reasonable accommodation (s)he would need in order to perform the essential functions of a position.

An organization's building must be accessible to people with physical disabilities.

11. Are there exceptions to the accommodation obligation?

There are two exceptions to the reasonable accommodation obligation:

- a. The circumstance where the accommodation would be an Undue Hardship on the organization. This might be in terms of financial cost to the organization. In deciding that, one looks at the overall organization's financial resources in addition to the departmental resources. Another reason for undue hardship would be that to implement a particular accommodation would so impact the type of operation that the organization really could not perform its purpose.

- b. The other exception is where offering the accommodation would present a direct safety risk to either the employee or others in the work environment. It is important in examining whether or not there is a direct safety risk to look to see if you have objective evidence. We should not base that decision on fear or stereotypical notions.

12. What are the guiding principles of following the EEO laws?

We can create a workplace in which people from different backgrounds all contribute—an environment that provides equity in mobility and in which everyone's talents are used and valued. Starting from that premise the laws really are the foundation for a strong and vibrant organization.

13. How do leaders view compliance issues?

There is a growing notion from a leadership perspective that compliance with the laws such as EEO, and ADA and non-discrimination are seen as an opportunity rather than as a barrier. When we cast our nets wide and broad and bring in as many people as we can, it will affect our productivity, performance and ultimately our profit for the new organization.

The leaders of the 21st century will be willing to engage in self-examination. They recognize that we all hold prejudices. What we want to do is find out what these prejudices are, and to make certain that they do not influence our employment decisions.

Part Three: Working with the Material

The activities that follow are intended to help you examine your understanding of EEO laws and how they impact your management decisions. They can be done individually or used with a team of individuals who are responsible for legal compliance.

Identifying and Preventing Gender Discrimination

Handout 6

Bob, a manager, is considering two employees for a research position on a long-term special project. One of the candidates, Steve, (a white male, age 30, married, and no children) has a B.S. and several years of research experience (although unrelated to the project in question). During his interview with Steve, Bob explained the research in detail. Steve was very enthusiastic about it and had some good ideas as to how to approach the research.

The second staff member, Sally, is a white female, age 31. She has her M.A. from Cal Tech. Sally has worked on related research and told Bob about this research during her interview. She seemed fairly dogmatic about her approach to this kind of research. Bob knows that Sally and her husband have been thinking about having children and he suspects that she is pregnant. He is concerned that, if Sally does have children, she will not want to work the hours this project requires and, after she has a child, will take an extended maternity leave under the FLMA. If she does so, it could hamper the project. He decides that it is best to get this issue out on the table and asks Sally during her interview what her plans are with regard to having children. Sally tells him that she would like to have children in the near future. Bob then asks her how she will manage being both a mother and a full-time research engineer. Sally gets very defensive and states that she is more than capable of handling both children and a career.

Bob decides that this project would be a good “stretch” project for Steve and that Sally does not really need the experience. He also believes that Steve’s personality will be a better fit with the other members of the team. Thus, he offers the position to Steve.

1. What behaviors or attitudes might reflect gender bias in this situation?
2. Discuss how those behaviors or attitudes might affect the people involved.
3. How should this situation be dealt with?
4. Could this situation be prevented and, if so, how?

Identifying and Preventing Racial Discrimination

Handout 7

In an employment interview, Darryl, black, age 28, is telling Greg, white, age 30, an engineer with the organization, how he developed a new program for monitoring systems. Greg asks him what he does when he is not working. Darryl answers, mildly surprised, that he plays the sax; Greg plays, too, and digresses from the interview to talk about jazz.

Darryl comes back with questions about salary, training, projects, and clients; Greg answers generally and then asks Darryl, out of curiosity (“not that it matters”), how he came to major in engineering. Darryl answers. Greg asks when Darryl can start if made an offer. Darryl says one month and asks Greg about opportunities for advancement. “The sky is the limit,” replies Greg. Darryl says he will settle for Director of Operations. Greg’s look says he would, too. Greg closes the interview by complimenting Darryl on his style, adding that he, too, has had to overcome some barriers in his career and admires Darryl’s determination. He says that even though some clients are prejudiced, the company is prepared to deal with that. Greg later offers the position to a white male who he believes is more qualified.

1. What behaviors or attitudes might reflect racial bias in this situation?
2. Discuss how those behaviors or attitudes might affect the people involved.
3. How should this situation be dealt with?
4. Could this situation be prevented and, if so, how?

The ADA and Hiring

Handout 8

The Americans with Disabilities Act prohibits you from asking any questions about an applicant's health until after you have made a conditional offer of employment. May you legally ask the following questions of an applicant? Answer yes or no.

	Yes	No
1. Please list diseases for which you have been treated.	<input type="checkbox"/>	<input type="checkbox"/>
2. Have you ever been hospitalized? If so, for what condition?	<input type="checkbox"/>	<input type="checkbox"/>
3. Have you ever been treated for any mental condition?	<input type="checkbox"/>	<input type="checkbox"/>
4. How well can you handle stress?	<input type="checkbox"/>	<input type="checkbox"/>
5. Can you perform this particular job function with or without an accommodation?	<input type="checkbox"/>	<input type="checkbox"/>
6. [If applicant indicates that she needs an accommodation:] What kind of reasonable accommodation would you need?	<input type="checkbox"/>	<input type="checkbox"/>
7. How many days were you absent from work because of illness last year?	<input type="checkbox"/>	<input type="checkbox"/>
8. Do you have any physical defects which preclude you from performing certain kinds of work? If yes, describe such defects and specific work limitations.	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you have any disabilities or impairments which may affect your performance in the position for which you are applying?	<input type="checkbox"/>	<input type="checkbox"/>
10. Are you taking any prescribed drugs?	<input type="checkbox"/>	<input type="checkbox"/>
11. Have you ever been treated for drug addiction or alcoholism?	<input type="checkbox"/>	<input type="checkbox"/>
12. Have you ever filed for workers' compensation insurance?	<input type="checkbox"/>	<input type="checkbox"/>

Answers

You may legally ask only questions 4 and 5. Simple job stress is not regarded as a disability unless a doctor certifies that it is symptomatic of a diagnosable stress disorder. If the applicant tells you that (s)he will need an accommodation, you may not ask the applicant question six. You can, however, ask the applicant to describe or demonstrate how (s)he would perform a particular job function.

The ADA and Reasonable Accommodation Handout 9

The Americans with Disabilities Act requires that you offer an employee with a disability a reasonable accommodation to enable him/her to perform the essential functions of his/her position. Under the ADA, an employer is required to consider certain factors in determining whether a function is essential to a position. Read the following and complete the job analysis for your position.

Does the Employee Actually Perform the Function?

The first consideration is whether employees in the position actually are required to perform the function.

For example: A job description for a secretary may state that typing is a function of the job. If you never or seldom require an employee in that position to type, this could not be considered an essential function.

Would Removing the Function Fundamentally Change the Job?

The next consideration is whether removing that function would fundamentally change the job. There are several reasons why a function could be considered essential:

1. The position exists to perform the function.

For example: A person is hired to proofread documents. The ability to proofread accurately is an essential function, because this is the reason that this position exists.

2. There are a limited number of other employees available to perform the function, or among whom the function can be distributed.

This may be a factor because there are only a few other employees, or because of fluctuating demands of a business operation.

For example: It may be an essential function for a file clerk to answer the telephone if there are only three employees in a very busy office and each employee has to perform many different tasks.

3. A function is highly specialized, and the person in the position is hired for special expertise or ability to perform it.

For example: A company wishes to expand its business with Japan. For a new sales position, in addition to sales experience, it requires a person who can communicate fluently in the Japanese language. Fluent communication in the Japanese language is an essential function of the job.

The ADA and Reasonable Accommodation

Handout 9, page 2

Complete this job analysis for your position: _____

Purpose

Essential Functions

Marginal Functions

Physical and Mental Requirements

Possible Modifications

What is a Reasonable Accommodation? Handout 10

The Americans with Disabilities Act requires that you offer an employee with a disability a reasonable accommodation to enable him/her to perform the essential functions of his/her position. The Act lists the following as potential accommodations:

- Readily accessible facilities
- Job restructuring
- Part-time or modified work schedules
- Reassignment to a vacant position
- Acquisition or modification of equipment or devices
- Modifications of examinations, training materials or policies
- Qualified readers or interpreters

List potential reasonable accommodations for employees with the following disabilities:

- A computer word processor who has a sight impairment:
- A manager in an office environment who has a paraplegic:
- A secretary who has a back impairment:
- A recovering alcoholic who is in a rehabilitation program:
- An employee who is unable to perform the essential functions of his/her position even with an accommodation:
- An employee in a stressful job who is suffering from post-traumatic stress disorder:
- A telephone customer service representative who is blind:

Questions for Watching the Video

Handout 5

1. What is EEO?
2. What is Affirmative Action?
3. What is diversity?
4. What are protected classes and what are they protected from?
5. Are there different types of discrimination?
6. What is disparate treatment?
7. What is disparate impact?
8. What is retaliation?
9. What is harassment and what must be done to avoid it?
10. What is the ADA and what does it require of employers?
11. Are there exceptions to the accommodation obligation?
12. What are the guiding principles of following the EEO laws?
13. How do leaders view compliance issues?

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