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Pepperdine University
Graduate School of Education and Psychology

ENGAGING DIVERSITY: BEST PRACTICES TO CREATE AN INCLUSIVE WORK
ENVIRONMENT

A dissertation submitted in partial satisfaction
of the requirements for the degree of
Doctor of Education in Organizational Leadership

by

Britta M. Wilson

July, 2016

Farzin Madjidi, Ed.D. – Dissertation Chairperson

This dissertation, written by

Britta M. Wilson

under the guidance of a Faculty Committee and approved by its members, has been submitted to and accepted by the Graduate Faculty in partial fulfillment of the requirements for the degree of

DOCTOR OF EDUCATION

Doctoral Committee:

Farzin Madjidi, Ed.D., Chairperson

Gabriella Miramontes, Ed.D.

Lani Simpao Fraizer, Ed.D.

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TABLE OF CONTENTS

	Page
LIST OF TABLES	vi
LIST OF FIGURES	vii
DEDICATION	viii
ACKNOWLEDGEMENTS.....	ix
VITA.....	xii
ABSTRACT	xiv
Chapter 1: The Journey to Inclusion Begins.....	1
Background.....	2
Statement of the Problem	5
Purpose of the Study	5
Research Questions	6
Significance of the Study	6
Key Definitions	12
Key Assumptions	13
Limitations of the Study	13
Summary	14
Chapter 2: Literature Review.....	15
Definition of Diversity	15
Definition of Inclusion.....	20
Anthropological Perspectives	22
Social Perspectives	25
Psychological Impacts	26
Organizational Considerations.....	30
Best Practices to Create Inclusion.....	50
Global Considerations	56
Summary	56
Chapter 3: Research Design and Methodology.....	58
Nature of Study.....	59
Restatement of Research Questions.....	61
Methodology	62
Research Design	64
Statement of Personal Bias	77
Data Analysis.....	79

	Page
Inter-rater Reliability and Validity	81
Summary	81
Chapter 4: Findings	83
Profile of the Participants	85
Data Collection	86
Data Analysis	89
Research Question One	91
Research Question Two	105
Research Question Three	111
Research Question Four	121
Chapter Five: Conclusions and Recommendations	128
Research Questions	129
Summary of Findings	129
Key Findings	137
Researcher's Observations	141
Implications of the Study	142
Recommendations for Future Research	146
Final Thoughts	149
REFERENCES	150
APPENDIX A: Recruitment Script	174
APPENDIX B: Informed Consent	175
APPENDIX C: IRB Approval	181

LIST OF TABLES

	Page
Table 1. Active Listening Strategies	72
Table 2. Research Questions and Corresponding Interview Questions	76
Table 3. Participant Demographics by Industry and Title	86
Table 4. Annual Measures for Global Inclusion	119
Table 5. Elements of Inclusion with Corresponding Measures	121

LIST OF FIGURES

	Page
Figure 1. Evolution of diversity to inclusion	9
Figure 2. Gender distribution of research participants.....	85
Figure 3. Distribution of CDO titles.	86
Figure 4. Qualitative data analysis process.....	89
Figure 5. The definition of inclusion: Coding results.....	92
Figure 6. The best practices to promote inclusion.....	96
Figure 7. Practices that hinder inclusion.....	100
Figure 8. Resources required to recruit and retain.	103
Figure 9. Challenges CDOs face.....	107
Figure 10. How CDOs deal with challenge.....	108
Figure 11. Elements of a successfully inclusive work environment.....	113
Figure 12. Measures that leadership values.....	116
Figure 13. Methods CDOs employ to benchmark inclusion practices.	120
Figure 14. Highlights of cautionary tales.	123
Figure 15. Will characteristics change in the future?.....	125
Figure 16. Inclusion-rich practices per lifecycle stage.	133
Figure 17. Challenges CDOs face.....	134
Figure 18. Inclusion framework	140
Figure 19. Individual and common elements from literature review and CDOs.	143

DEDICATION

I dedicate this work to my grandmother, Velma D. Locke, who had a love of learning like no one else I know or have known. Growing up in the Jim Crow south prevented her from pursuing the education that she dreamt of, so I am honored to honor her with this achievement. I know that if she were still with us, she would be shouting “sho nuff” with her church hat and heels on.

ACKNOWLEDGEMENTS

Several years ago, I had the incredible honor of being named a Distinguished Alumni, Pepperdine Graziadio School of Business and Management. As I stood silently on the stage and looked out upon the sea of graduates, my head and heart were immediately reminded of a promise that I had made to myself a dozen years ago to get a doctorate. In my head, I could see myself being hooded and in my heart, I could audibly hear, "It's time. Plan and Prepare." As I took my seat after my speech, I considered if "I could pull it off." In the months that followed, I prayed and discussed it with Jeffrey. As we should expect from GOD, the vision was not without provision. Just as I started that Distinguished Alum speech with acknowledgement and honor to my GOD, I also do so here. Thank you GOD who has rained love, grace, mercy, wisdom and favor upon me and in doing so, has blessed me beyond my wildest dreams with:

My husband, Jeffrey, who is always there to offer support, encouragement and love. There is no way that this exercise could have been completed without you. "From the beginning, you've always been my old friend" – Al Jarreau.

Three children who have enriched my life in ways that I could not even number. Brittany, Jarielle and Jordan, - you are individually and collectively the greatest blessing in my life. I am beyond proud to be your mother and cannot put words to the depths of my love. You make me smile inside and out.

My mom, Dorothy, who as a young divorcee and single mom, worked multiple jobs to keep me in great schools and to insure that I had my heart's desires. Even back at 3711, I understood and appreciated your sacrifice, hard work and example.

My sissy's, Sharlyn and Lori, who prayed for and with me; who propped me up when "just takin a seat" seemed to be a most attractive option. Sharlyn – my Sista Friend/Road Dog Extraordinaire, I know that "He's Preparing You" for something *superduperfantastic* and no one is more deserving!

A loving family of uncles, brothers, aunts and cousins. Since I know that you may not bother to read the pages that follow, but will look for your name in these acknowledgements, here you go. William – who bought into the vision that I sold and opened up his pulpit to allow me to honor him on his pastoral anniversary. Buz – where do I begin, let's just say this: Sightseeing on Carnegie, Filet O Fish, Easter ensembles, etc. PL – who contributed to this educational journey and allowed me to take classes with him (and the Claysburg crew) at Indiana University 35 years ago. My brothers, Ron, Ken Jr., and Chris. Thank you for ongoing love and support. Ron, I love that you'll drive a 1000 miles in a weekend to see your sister. My cousin Shirley, who is now representing for my most favorite Aunt Lilly. Thank you for your prayers and check in calls. My Aunt Phyllis, thank you for the "treats" when I was a kid.

A cadre of sister-friends who didn't press me when I couldn't come out and play with the Saturday Sistas because I had homework to do. I can't wait to get back on schedule!

The I-Tribe. A diverse collection of compassionate, committed folks that started this journey together.

My pals at Expedia, Ya'll are the best! Working and traveling with you has been the source of deep in the belly laughs with tears in the eyes. Do I really have to put hand sanitizer in my hair to get through Immigration?

My pals from Paramount, Fremont and Pepsi/TacoBell. I have learned from you, lunched and laughed with you and hosted great parties that you've attended. I am grateful for your friendships.

To the plethora of captains and flight crews on American and Alaska who did your jobs with such excellence that I could comfortably grab some much needed zzzzz's or work on this research.

My freshman undergraduate college professor who by his closed mind and limited thinking inspired me to prove to him that this black girl from Shaker Heights could and would graduate from college in 3 years, Your attempt to tell me what I couldn't accomplish has provided a lifetime of inspiration, resolve and confidence to chart my own path. Ha!

Last, but certainly not least, my committee, who were open minded and embodied limitless thinking. I am deeply and sincerely grateful to Farzin Madjidi, Lani Fraizer and Gabby Miramontes, who were fearless enough to innovate. Your willingness to try something different to support a cadre of driven (and possibly, insane) students has touched us all. Thank you for pressing your way, which allowed us to press ours. The tips, tools and touchbases were deeply appreciated and immensely valuable. Thank you seems insufficient.

And to the many of you, who are not mentioned by name, please know that it is not a reflection on the deposits that you made. I remain grateful.

With heartfelt appreciation to all...

VITA

EDUCATION

Pepperdine University, Graduate School of Education and Psychology
Doctor of Education in Organizational Leadership (expected) 2016
Dissertation Title: Engaging Diversity: Best Practices to Create An Inclusive Work Environment

Pepperdine University, Graziadio School of Business and Management 1994
Executive Master of Business Administration

UCLA 1983
Bachelor of Arts in Sociology

TEACHING EXPERIENCE

Pepperdine University, Graziadio School of Business and Management
Faculty Practitioner
Courses Taught: Managing Diversity in Organizations

University of Phoenix
Faculty Practitioner
Courses Taught: Human Resources

HONORS

Los Angeles Lakers & Comerica Bank, Women in Business Leadership Award 2016

Distinguished Alumni Award, Pepperdine Graziadio School of Business & Management
2012

Governor's Award for Female Business Owners 2000

PROFESSIONAL EXPERIENCE

Chief Inclusion Officer, Vice President, Inclusion Strategies 2015-Present
EXPEDIA, INC.

Senior Vice President, People & Organization 2009-2013
PARAMOUNT PICTURES

Management Consultant 2006-2009
PREMIER MANAGEMENT ALLIANCE, LLC

Vice President, Human Resources
FREMONT INVESTMENT & LOAN

2005-2006

Managing Consultant
HEWITT ASSOCIATES

2000-2004

VOLUNTEER EXPERIENCE

Pepperdine University, Graziadio School of Business & Management
Board of Visitors

Pepperdine University, Graduate School of Education & Psychology
PhD. Advisory Committee

National Black MBA Association, LA Chapter
Advisory Board

National Black MBA Association, LA Chapter
Chair, Leaders of Tomorrow

USO
Board of Directors

Goodwill of Orange County
Board of Directors

Cornelia Connelly High School
Board of Directors

ABSTRACT

It is believed that the commitment to diversity in the workplace is rooted in the civil rights movement. Six decades later, many companies have achieved a demographically diverse workforce, while others have not. Some organizations assumed that diversity would automatically result in inclusion. Seemingly, it has been more elusive to create and sustain an inclusive workplace. Within large global organizations, the task of creating such a workplace rests with the Chief Diversity Officer (CDO).

Inclusion, as related to engaging diverse employees in the workplace, is an emerging concept. This study explored the perceptions and experiences of Chief Diversity Officers in establishing and maintaining an inclusive work environment. Specifically, this study focused on identifying the challenges they faced and determining the strategies and measures these practitioners implemented to cultivate cultures of inclusion. Further, given their experiences, this study sought to capture their recommendations for others who may consider such a task. Therefore, qualitative research methodology was aligned to the purpose of exploring the meaning assigned to this experience to identify best practices. The qualitative approach relied upon semi-structured interviews conducted on a one-on-one basis with the survey participants. In using a one-on-one format, the researcher was able to glean deep understanding and insight regarding the practices of CDOs.

The salient findings of the study indicate that there is commonality in regards to the foundational elements of building a culture of inclusion and the challenges that the CDOs have faced. The most noted foundational elements were building organizational capability, blending inclusive practices throughout the talent management cycle and

branding the organization as inclusive. With regard to the challenges, most often cited were organizational priority, executive embrace and sufficient resources. In consideration of the existence of measures and which metrics were captured, there was significant disparity. While there was no evidence of consistent best practice associated with measurement, there was universal belief that the creating and sustaining inclusive workplaces would be requisite in the future. The respondents noted that the shifting demographics would make inclusive workplaces requisite for global businesses.

Chapter 1: The Journey to Inclusion Begins

Diversity's emergence in the workplace was the result of legislation to render discrimination unlawful: specifically, if that discrimination was based on gender, ethnicity, nationality, race, or religion. Although organizations have sought to comply with the legislation, they have struggled to achieve the benefits associated with having a diverse workforce and creating an inclusive work environment. In an inclusive work environment, everyone is treated with dignity and respect, the talents and skills of dissimilar groups are valued, and productivity, creativity, and innovation improve as a result of a workforce that is happier, more motivated, and more aware of the benefits that inclusion can bring. Within large global organizations, the task of creating such an environment routinely is the responsibility of the Chief Diversity Officer (CDO).

The CDO is the company's executive-level diversity and/or inclusion strategist. According to a 2011 survey of CDOs, the impetus to create an inclusive work environment is predicated on various factors, ranging from enhanced business innovation and creativity to the realities of shifting demographics (Worthington et al., 2011). By 2042, there will be no ethnic or demographic majority; people of color will compose almost 60% of the U.S. population. It is expected that those organizations that leverage and empower differences by achieving full participation will experience optimum performance to sustain their success (Kochan et al., 2003). Inclusive organizations have employee engagement that is higher than their industry peers. High engagement facilitates higher performance and productivity (Miller, 1998).

Background

The U.S. workforce has been experiencing a steady demographic transformation. According to a Pew Research Center study (Taylor, 2014), the racial tapestry of the U.S. has changed substantially from the 1960s to 2014 and will see another significant shift prior to 2030. In 1960, the population of the United States was 85% White. By 2060, the population will be 43% White. William Frey (2014), expert demographer and Senior Fellow at the Brookings Institute, asserted that the rapid growth in the “new minorities” (p. 3) of Hispanics, Asians, and multiracial Americans, along with African Americans and other groups, is transforming the American landscape.

American history can attest that changes in the landscape have also served as a catalyst of broader transformations. Changes coming from the civil rights movement of the 1960s led to the landmark Civil Rights Act of 1964, which made discrimination based on race, color, religion, sex, or national origin illegal. Specifically, Title VII of the Act addressed employment discrimination. Those who opposed Title VII were concerned that employers would be required to grant preferential treatment to racial minorities (McCormick, 2008). Those concerns were addressed explicitly in Section 703 (j) of the Act:

Preferential treatment not to be granted on account of existing number or percentage imbalance.

Nothing contained in this subchapter shall be interpreted to require any employer, employment agency, labor organization, or joint labor—management committee subject to this subchapter to grant preferential treatment to any individual or to any group because of the race, color, religion, sex, or national

origin of such individual or group on account of an imbalance which may exist with respect to the total number or percentage of persons of any race, color, religion, sex, or national origin employed by any employer, referred or classified for employment by any employment agency or labor organization, admitted to membership or classified by any labor organization, or admitted to, or employed in, any apprenticeship or other training program, in comparison with the total number or percentage of persons of such race, color, religion, sex, or national origin in any community, State, section, or other area, or in the available work force in any community, State, section, or other area. (McCormick, 2008, p. 133)

Although Title VII does not require preferential treatment of underrepresented groups, Affirmative Action and Equal Employment Opportunity did add standards and requirements that would compel employers to eliminate disparate treatment. The requirement to create equity in the workplace was supported with the release of the 1987 Hudson report, which predicted increased workforce diversity. The study commissioned by then Secretary of Labor, William Brock, sought to identify economic and demographic trends. The study was published in a seminal book (Johnston & Packer, 1987), *Workforce 2000*, which identified five key findings:

1. The population will grow slower than at any time since the 1930s.
2. The average age of the workforce will intersect with the shrinking of younger workers entering the labor market.
3. Increased volume of women will enter the workforce.
4. The largest share of those entering the workforce for the first time will be racial and ethnic minorities.

5. Immigrants will constitute the greatest increase in the population. (p. xx)

The legislative guidelines set forth via the Equal Employment Opportunity Commission and Affirmative Action, coupled with the *Workforce 2000* report, gave birth to the concept of diversity management as a way to address demographic variety (Subeliani & Tsogas, 2005). The need to understand heterogeneity in the workplace was preeminent. The notion that human diversity could be addressed via a managerial approach was established out of EEO. This new approach was necessitated by increased workforce diversity, which was not limited to the United States; rather, global shifts were occurring simultaneously (Frey, 2014). Many multinational organizations were witnessing an increasingly complex blend of cultures and nationalities in their workforces (Rosenzweig, 1998).

As a result of the shifts in the characteristics of the population, thoughtful business leaders recognized the realities of the impending increase in diversity in the workplace and began considering the business case for it. As Gardenswartz and Rowe (2009) noted, “Because of vision and necessity, companies began to understand that diversity was a business issue and managing it effectively was a strategic imperative for growth and survival” (p. 35). In an address to the Economic Club of Detroit, John Bryan (1998), Chairman and CEO of the Sara Lee Corporation, shared his belief that diversity is a strategic imperative and that success in the years ahead will require an aggressive and skillful leadership in promoting diversity. Bryan noted that, for his organization, diversity could provide a competitive advantage founded upon the “extraordinary demographic shifts and unstoppable shift in global competition” (p. 44). It would follow,

then, that those organizations that learn to embrace the changing winds of demography effectively would gain the competitive advantage.

Statement of the Problem

From the 1960s to the present, many organizations have committed resources and attention to increasing the diversity of the workforce. Despite making these investments, most organizations have yet to achieve the panacea that some believed workplace heterogeneity would provide. In fact, some organizations have incorrectly assumed that achieving diversity would automatically facilitate and/or result in inclusion. The result has been the incorrect perpetuation that diverse employees are fully engaged and included. Although diversity has been achieved in many organizations, the reality of inclusion is still elusive. Indeed, as Bargal and Mor Barak (2000) wrote:

An individual's sense of inclusion or exclusion in the organizational system is the result of the interplay between the individual's personal characteristics that affect their values and norms (the personal dimension) and the organization's environment in the form of policies and procedures (the organizational dimension). The congruence, or fit, between what the individual brings to the work environment and the organizational culture in the workplace dictates how welcomed and valued they feel in the system. (p. 58)

Purpose of the Study

As one looks more deeply into most organizations, one finds that diversity has become more commonplace and touted as a major initiative. However, facts reveal that creating an inclusive work environment is falling short of desired targets (K. Thomas, Tran, & Dawson, 2010). Accordingly, the purpose of this study was to:

- Determine the strategies employed and challenges faced by CDOs in creating an inclusive work environment for diverse employees.
- Determine what measures and recommendations CDOs would suggest to implement an inclusive workplace.
- Determine what recommendations CDOs would provide to help others seeking to cultivate an inclusive work environment.

Research Questions

In order to discover how to create an inclusive work environment and overcome problems associated with the lack of workplace inclusion by diverse employees, this study posed the following questions:

1. What strategies and practices do CDOs in global organizations employ to promote and facilitate inclusion of diverse employees?
2. What challenges do CDOs face in implementing strategies and practices employed to achieve inclusion of diverse employees?
3. How do CDOs measure the success of their inclusive workplace practices?
4. What recommendations would CDOs make for future implementation of inclusive workplace practices?

Significance of the Study

Bishop Desmond Tutu (2010) once stated, “Exclusion is never the way forward on our shared paths” (para. 8). Fittingly, the concept of inclusion is nascent in organizational literature (Roberson, 2004). As a concept that lacks depth in its historical context, there are many different perspectives of inclusion’s theoretical basis (Shore et al., 2011). Workforce inclusion, the elusive panacea that organizations seek, is realized

when all employees feel valued, engaged, considered, and recognized. Inclusion occurs when employees feel they have a voice in decision-making, especially in matters related to their work and careers. Inclusion brings to bear those “organizational objectives designed to increase the participation of all employees” (Roberson, 2004, p. 220). When employees are invited to participate, they become more engaged. Research indicates that a correlation exists between employee perceptions of inclusion and predictors of commitment and performance (Downey, Van Der Werff, Thomas, & Plaut, 2015). Organizational scholars have found that employees who provide accounts of experiencing compassion also report having greater commitment to their organization and relate to their coworkers and organization in positive terms (Lilius et al., 2012).

The significance of this study is that it provided insight into the benefits of inclusion and costs of exclusion. Business, human resources, and diversity leaders recognize the study of inclusion as important, as evidenced by the recent shift of emphasis from diversity to inclusion. Significant research has been conducted addressing workforce diversity, but scholars have only recently begun to focus on inclusion (Shore et al., 2011). Therefore, this study provided a solid basis upon which organizations can better understand the conceptual definition and framework of the best practices associated with creating an inclusive workplace, enabling them to develop customized solutions and programs that will align with their culture and resonate with their diverse workforce.

Significance for business leaders. Business leaders will find benefit in an improved understanding of the requisite elements of inclusion. Specifically, they will have clarity regarding their role and responsibilities in fostering an inclusive work

environment. This study also provides guidance to help them make valuable investment decisions as related to their human capital.

Significance for human resource leaders. Human resource departments are charged with strategically recruiting, retaining, and rewarding employees. Their overarching responsibility is to manage people strategically and adroitly as a business resource. To be effective in this capacity, human resources must build capacity, capability, and commitment. The insights gleaned from this study will inform their ability to do so while forging collaboration among them, the business, and diversity leaders. Human Resources leaders are also often responsible for the diversity in their workplaces (Kreitz, 2008).

Significance for diversity leaders. Diversity leaders, unlike other functional leaders, address diversity and inclusion as a first priority. Since they have the primary responsibility for leading efforts to assess, define, nurture, and cultivate the organization's diversity, their focus is myopic regarding the deployment of initiatives to foster inclusion. This study will augment their ability to do so effectively.

Exclusion threatens certain fundamental human needs, such as belonging and self-esteem (K. Williams & Nida, 2011). Exclusionary behaviors in the workplace take on many forms, such as inequity of access to opportunities and outright rejection. The psychological impact of perceived exclusion includes a host of ills, including increased social anxiety, depression, loneliness, and hurt feelings. Research indicates that the perception of exclusion predicts job satisfaction and psychological well being (Hitlan, Clifton, & DeSoto, 2006).

The emergence of inclusion may portend the lack of success that many companies have achieved with their workplace diversity initiatives. According to Bourke, Smith, Stockton, and Wakefield (2014), one factor to which this failure is attributed may be the company's treatment of diversity as a matter of compliance versus transforming the workplace to create an inclusive environment. The focus on compliance can be best understood from the historical vantage point of the evolution of diversity. In a presentation on inclusion in the workforce, Deputy Assistant Secretary for Diversity and Inclusion of the U.S. Department of Veterans Affairs Georgia Coffey (2013) depicted the evolution as shown in Figure 1.

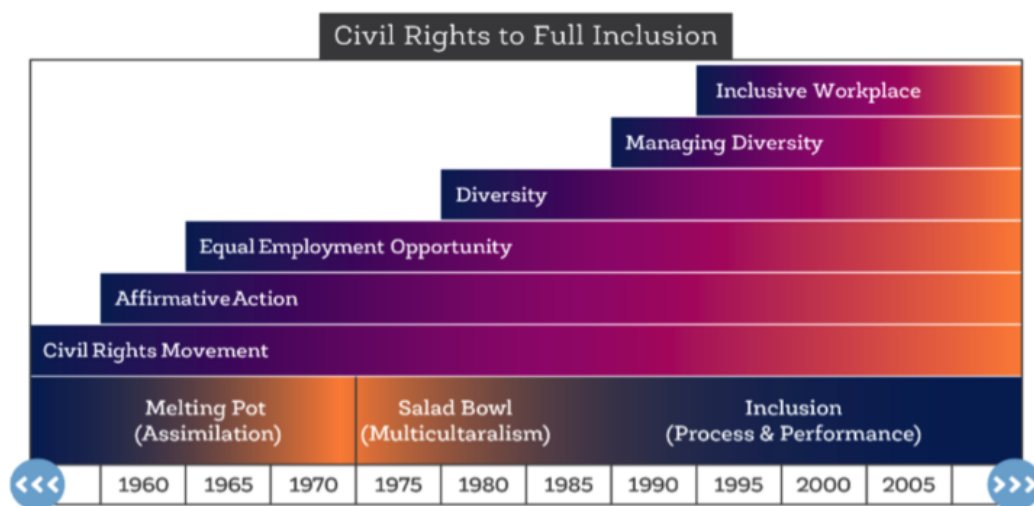


Figure 1. Evolution of diversity to inclusion. Reprinted from *The Inclusion Paradigm: The Key to Organizational Performance* [PowerPoint presentation], by G. Coffey, 2013, slide 5, retrieved from <http://www.diversity.va.gov/training/files/the-inclusion-paradigm-short.ppt>. Reprinted with permission.

The African American Civil Rights Movement. Overturning the veto of President Andrew Johnson, the Civil Rights Act of 1866 marked the beginning of the African American Civil Rights Movement, declaring that all persons born in the United States were citizens. On May 17, 1954, the movement was re-energized with the Supreme Court ruling in *Brown v. Board of Education of Topeka, Kansas* and in *Bolling*

v. Sharpe. These rulings effectively overturned *Plessy v. Ferguson* (Janda, Berry, & Goldman, 1992).

Affirmative Action: March 6, 1961: Executive Order 10925 makes the first reference to “affirmative action.” This Executive Order, issued by President John F. Kennedy created the Committee on Equal Employment Opportunity. The Executive Order mandated that federally funded projects adopt affirmative action to ensure that hiring and employment practices are free of racial bias (Ferdinand, 2014).

June 4, 1965: Speech defining concept of affirmative action. In a commencement speech at Howard University, President Johnson spoke of social injustice and economic inequalities between Blacks and Whites. Johnson’s speech framed the concept underlying affirmative action, asserting that civil rights laws alone are not enough to remedy discrimination. Many felt that this was the first time the President acknowledged the discriminations that Blacks had experienced (MacLean, 2006).

September 24, 1965: Executive Order 11246 enforces affirmative action for the first time. As a result of an executive order signed by President Johnson, government contractors, were also required to “take affirmative action” (Leon-Guerrero, 2010, p. 90) toward minority employees. The order was amended 2 years later to include gender-based discrimination. The Office of Federal Contract Compliance Programs is responsible for administering this order.

August 8, 1969: Executive Order 11478. Prohibiting discrimination on certain grounds in the competitive service of the federal civilian workforce, this order was signed by President Richard M. Nixon. This affected civilian employees of the U.S.

Armed Forces as well as the U.S. Postal Service. In subsequent years, the order was enhanced to offer protection to broader groups and statuses (Rosen, n.d.).

Equal Employment Opportunity: July 2, 1964. The Civil Rights Act of 1964 was a landmark piece of legislation that outlawed unequal application of voter registration requirements and racial segregation. Other laws enforced by the Equal Employment Opportunity Commission include Equal Pay Act of 1963, Age Discrimination in Employment Act of 1967, the Americans with Disabilities Act of 1990, the Rehabilitation Act of 1973, the Civil Rights Act of 1991, and the Genetic Information Nondiscrimination Act of 2008 (Haberfeld et al., 2005).

Diversity. The term *diversity* was coined in 1977 to refer to the changing demographics of the workforce. The term is credited to Merlin G. Pope Jr. (Hughes, 2014). Pope is recognized as a pioneer in the diversity arena.

Managing diversity. The first use of the phrase *managing diversity* is often attributed to former Harvard Business School Professor R. Roosevelt Thomas. His 1990 article in the *Harvard Business Review* began with the prediction: “Sooner or later, affirmative action will die a natural death. Its achievements have been stupendous, but if we look at the premises that underlie it, we find assumptions and priorities that look increasingly shopworn” (p. 107). Instead, Thomas contended, “The goal is to manage diversity in such a way as to get from a diverse workforce the same productivity we once got from a homogenous workforce, and do it without artificial programs, standards—or barriers” (p. 112). Additionally, Thomas asserted that diversity is not limited to a handful of social characteristics. Rather, it includes other ways in which

people differ from one another, including age, background, education, work role, and personality.

Inclusive workplace. Mor Barak (2000a) used the term for the first time in the early 2000s. It essentially describes a workplace that invites and appreciates diversity. This workplace is considered to a model environment.

Key Definitions

The following key terms are used in this study:

Best practices: “Practices, which are most appropriate under the circumstances, esp. as considered acceptable or regulated in business; techniques or methodologies that, through experience and research, have reliably led to desired or optimum results” (“Best Practices,” n.d., para. 1).

Chief Diversity Officer (CDO): An organization’s executive-level role serving as the diversity and inclusion strategist (D. Williams & Wade-Golden, 2013).

Diversity: The presence of demographic differences, including those that are visible and those that are not visible (Nishii, 2013).

Exclusion: Employees’ perceptions that they are not valued or respected and have been barred from participation (Miller & Katz, 2002).

Inclusion: Employees’ perceptions that their unique contribution to the organization is appreciated and they have full organizational membership (Miller & Katz, 2002).

Insight: An intuitive understanding of relationships that sheds light on or helps to solve a problem (Robinson-Riegler, 2004).

Perceive: “To be aware of, to recognize, discern, or understand” (“Perceive,” n.d., para. 1).

Practices: “The repeated systematic performance or customary way of doing something” (“Practice,” n.d., para. 1).

Strategies: “Plans or methods to obtain a specific goal or result” (“Strategy,” n.d., para. 1).

Work environment: The aggregate of artifacts, conditions, surroundings, and influences in the workplace (K. Thomas et al., 2010).

Workplace: “A place of employment” (“Workplace,” n.d., para. 1).

Key Assumptions

There are several primary assumptions inherent in this study. First, it was assumed that the participants, as experienced professionals, would trust the interviewer and the confidential nature of the research, and would be transparent and fully willing to provide their insights. Second, the format of the interviews allowed the participants to share information broader than the scope of the inquiry. Third, despite professional experience in this area, the researcher strove to maintain objectivity throughout the research. Finally, it was assumed that the interviews would be scheduled and completed within the prescribed period.

Limitations of the Study

The limitations of a study are those characteristics of design that influence the results’ interpretation. Limitations usually derive from the framework and design. All research has limitations, as none is designed perfectly (Marshall & Rossman, 1989).

This researcher understood this reality and acknowledged the following limitations of the current study.

- Extant literature suggests limited availability of scholarly work and empirical research related to inclusive work environments.
- The methodology itself relied on the assumption that interviewee memories are accurate (Creswell, 2010).
- The semi-structured interview format had the potential to yield bias.
- Personal experiences, biases, and characteristics had the potential to influence the results.
- The principal investigator solely conducted the data collection.

Summary

Diversity management was borne out of a changing demographic landscape and against a legislative backdrop. With the emergence of workplace diversity, organizations were focused on diversity for the sake of compliance. Organizational thinking has since evolved to realize that diversity can provide a competitive advantage. Therefore, creating an inclusive work environment is a strategic imperative, yet a specific strategy for doing so has been elusive. CDOs are primarily responsible for creating an inclusive environment. This study explores the best practices CDOs employ to nurture inclusion as well as the challenges they face in doing so. The following chapter includes a comprehensive review of literature regarding inclusive workplaces and related topics.

Chapter 2: Literature Review

To consider and establish best practices for the effective engagement and management of diverse employees in corporate settings, multiple fields of study may provide valuable context. In the sections to follow, diversity and inclusion were considered from various perspectives. In addition, ranges of social and corporate contexts are also examined. Based on the literature and research reviewed, a set of best practices were put forth.

Definition of Diversity

It is essential to establish a clear conceptual basis for strategies and approaches regarding corporate diversity management. Therefore, this initial section focuses on a comprehensive consideration of approaches and definitions of diversity. In quality- or characteristic-based definitions, diversity refers to “differences between individuals on any attributes that may lead to the perception that another person is different from self” (van Knippenberg, De Dreu, & Homan, 2004, p. 1,008). In most cases, definitions of diversity focus on visible or easily discernible attributes, or characteristics including ethnicity, gender, age, etc. Some have advocated for an expansion of visible attributes, suggesting that elements beyond physical characteristics be considered, including but not limited to: leadership style, personal and corporate background, education, sexual preference, geographic origin, and tenure with the organization (R. Thomas, 1991, 1996). However, although these more inclusive definitions do represent a broader approach to diversity, many still are critical of the attempt to equalize the differences. Others have criticized the minimization of those elements of diversity that likely have resulted in greater detriment in the organization (Prasad, 2005).

Another approach to defining diversity highlights various social and interactional factors. Mor Barak, Cherin, and Berkman (1998) contended that “workforce diversity is not about anthropological differences among individuals that make them special or unique; diversity is about belonging to groups that are different than whatever is considered mainstream in society” (p. 84). As a result of affinity with certain groups, this definition established diversity on the basis of susceptibility to discrimination and negative employment (Mor Barak et al., 1998). To that end, Mor Barak (2014) asserted that in the absence of a universal definition of diversity, one consideration could be to use a process-based approach. A process-based approach provides a definition of diversity constructed around:

The division of the workforce into distinct categories that (a) have a perceived commonality within a given cultural or national context and that (b) impact potentially harmful or beneficial employment outcomes such as job opportunities, treatment in the workplace, and promotion prospects—irrespective of job-related skills and qualifications. (p. 136)

Like Mor Barak, others have similarly proposed definitions based on social groupings, particularly those who have faced systemic discrimination in the workplace (Hays-Thomas, 2004; Linnehan & Konrad, 1999). Still other approaches in this category have defined diversity in terms of intergroup interaction, paying particular attention to differences in power versus focusing on individual differences and historical discrimination and marginalization (Konrad, 2003; Konrad, Prasad, & Pringle, 2005).

One final approach to conceptualizing diversity is based in social constructionism, which defines diversity as “socially (re) produced in on-going, context-

specific processes” (Zanoni, Janssens, Benschop, & Nkomo, 2010, p. 10). From Lumby’s (2009) perspective, diversity is “the collective noun signifying the historically, socially and politically constructed inequality evident in most, arguably all, human groups” (p. 347). DiTomaso and Hooijberg (1996) offered a nearly identical definition, which suggested that:

People act through social, political, and economic institutions that create, embed, and reproduce the inequality among people, which we then call diversity.

Diversity is then acted out in the practices of everyday life and interpreted through lenses of moral and ethical reasoning that, when unexamined, legitimate both unearned privilege and unearned disadvantage. (pp. 164-165)

Dimensions of diversity. The aforementioned definitions underscore a number of dimensions underlying diversity. The most common of these dimensions are demographic characteristics (gender, race, age, etc.), which some describe in terms of visible and invisible traits (Jayne & Dipboye, 2004; Milliken & Martins, 1996; Phillips, Northcraft, & Neale, 2006). Others instead use surface- and deep-(or underlying) level categorizations (Harrison, Price, Gavin, & Florey, 2002; McMahon, 2011; Mohammed & Angell, 2004). Prior research has also divided diversity into primary and secondary dimensions (Jayne & Dipboye, 2004). The former categories (visible/surface/primary) generally include traits such as gender, race, age, and sexual orientation, whereas the latter (invisible/deep/secondary) refer to such factors as education, marital status, income, work experience, religious beliefs, and functional background (Kirton & Greene, 2005; Mok, 2002; Point & Singh, 2003; Rijamampianina & Carmichael, 2005; Van Knippenberg & Dijksterhuis, 2000), which may or may not be readily apparent. Hence,

these categories may be difficult to measure (McMahon, 2011). Characteristics in these alternative categories affect personal identity as well as enrich the primary factors (Jayne & Dipboye, 2004).

Further research supports the consideration of other dimensions of diversity. Perceived versus objective diversity represents one such dimension (Hobman, Bordia, & Gallois, 2004). In this case, researchers have postulated that there is a distinct and measureable difference between diversity as subjectively experienced and diversity as objectively observable. Evidence suggests that the effects of personal perception are strong (Hobman et al., 2004; Riordan & Wayne, 2008). Hubbard (2004a) identified four independent, though sometimes overlapping, aspects of diversity, which represent another dimensional approach. Hubbard's factors include: workforce diversity (composition of organization's employees), behavioral diversity (work, thinking, or learning styles), structural diversity (interactions across an organization's hierarchy), and business and global diversity (segmentation of customer markets). Finally, Jehn, Northcraft, and Neale (1999) identified social category diversity and informational and value diversity, suggesting that the majority of research on the topic fails to differentiate between these various forms or dimensions. Their perspective largely explains the resulting conceptual confusion regarding diversity.

Global differences. Notwithstanding definitional or conceptual distinctions, diversity research is also characterized by context variation. Context variation addresses the ways in which diversity is defined, operationalized, and even researched, varying greatly depending on context. Although significant research, theorizing, and applications of diversity have taken place in North America and Britain, the

particularities of these contexts mean that they are underlain by assumptions and findings that do not necessarily translate or apply to other contexts, such as different geographic regions. In the Czech Republic, for example, there is emerging awareness about the terms diversity management and inclusion, and, therefore, research and related theoretical developments are also emerging (Jiřincová, 2013). Studies conducted in Denmark (Risberg & Sørderberg, 2008) and New Zealand (D. Jones, Pringle, & Shepherd, 2000) found that U.S. models of difference and diversity management did not apply in these contexts. Research from Zimbabwe has shown that diversity is tolerated, rather than valued, in corporate settings (Mkono, 2010). Thus, whereas diversity is considered by some to represent a universal concept and diversity management principles to be widely applicable, research from non-American and British contexts is proving this assumption to be ill founded.

Lack of globally accepted definition. Given the relative import of context variations, it is clear that consensus has not been reached in regard to the conceptualization of diversity. Further, no globally accepted definition has been established (Qin, Muenjohn, & Chhetri, 2013). Likewise, diversity management may have any number of definitions, interpretations, applications, and implications (Visagie, Linde, & Havenga, 2011). Konrad et al. (2005) suggested that diversity's tie to domestic legal practices, civil rights, and public policy initiatives may explain the term's lack of definitional consensus and global applicability. To exacerbate the lack of global consensus regarding definitions of diversity, the issue is additionally complicated by the fact that diversity is often used interchangeably with the related concept of *inclusion*.

Definition of Inclusion

Diversity and inclusion are two related concepts that are often used interchangeably in the literature. Researchers have made efforts to distinguish the two concepts and study the effects and implications of each one independently (Mor Barak, 2015; Q. Roberson, 2006; Pelled, Ledford, & Mohrman, 1999). For example, Q. Roberson (2006) suggested that “diversity and inclusion characterize different yet related approaches to the management of diversity” (p. 217), in that diversity focuses on demographic elements and inclusion focuses creating a model workplace that is free of barriers. Mor Barak (2015) distinguished the two by describing diversity as the demographic differences (including both observable [e.g., gender, race, age] and non-observable [e.g., culture, cognition, education] attributes) that characterize a group or organization, and inclusion as employees’ perceptions that their unique contributions to the organization are appreciated and their full participation is encouraged. Pelled et al. (1999) defined inclusion as “the degree to which an employee is accepted and treated as an insider by others in a work system” (p. 1,014). Inclusive organizations are characterized by cultures and structures that are based on a pluralistic value frame (Cox, 2001); they constantly strive to modify their values and norms to accommodate employees (Findler, Wind, & Mor Barak, 2007) and support a sense of empowerment among their diverse work staff (Petter, Byrnes, Choi, Fegan, & Miller, 2002). By involving all employees fully and respectfully, regardless of diverse traits (Miller & Katz, 2002), inclusive organizations foster a sense of unity and belonging that satisfies the two basic needs of membership and uniqueness (Shore et al., 2011). Inclusion, unlike

diversity, is predicated on the perceived access, membership, and degree of influence that employees experience in the workplace (Mor Barak & Cherin, 1998).

Elements of the definition. For the most part, inclusion is based on valuation and respect. The existing literature identifies several indicators of inclusive environments. Overall, inclusion is predicated on culture, systems, and social relationships that fully leverage a workforce that is valued, respected, and supported for its diversity (Giovannini, 2004; Shore et al., 2011). Mor Barak (2014) suggested that in the workplace, inclusion refers to a person's "sense of being part of the organizational system" (p. 155), and this sense of belonging is indicated both formally (in terms of access to official information and paths to decision-making) and informally (*water cooler* or lunch meetings where informal information exchange occurs). According to Pelled et al. (1999), inclusion requires three fundamental elements: the degree to which employees are empowered to make decisions, how knowledgeable they are about overall strategic objectives, and the viability of their long-term service.

Relationship to engagement. Employee engagement can be defined as a sustained perception of "a positive, fulfilling, work-related state of mind that is characterized by vigor, dedication, and absorption" (Schaufeli et al., 2002, p. 74). Research has shown that a company's practices regarding diversity have a direct relationship with employee engagement. Downey et al. (2015) found that employment engagement and a trusting culture in the workplace are linked to diversity practices. Furthermore, contrary to prior findings, their research has demonstrated that this relationship exists across all employees, not just diverse employees (Cocchiara, Connerley, & Bell, 2010; Downey et al., 2015; Findler et al., 2007). McKay et al. (2007)

reported similar findings, demonstrating that contentment with the perception of a diverse environment (James, James, & Ashe, 1990), with significant negative associations exist between diversity climate and turnover intentions. Seemingly, developing a common group identity has also been shown to positively affect engagement in terms of satisfaction with and commitment to one's organization (Brewer, von Hippel, & Gooden, 1999) or member institution (Dovidio, Gaertner, Niemann, & Snider, 2001).

Anthropological Perspectives

Given the theoretical insights rooted in the study of anthropology, the field may provide a significant contribution to workplace diversity management, highlighting that culture is acquired and transmitted, cultures are varied, and may change with intercultural relationships (Hamada, 1999; Jordan, 2009). This notion is evidenced by the surge in anthropological consultancy firms working in corporate contexts since the 1990s, applying traditional anthropological theories and methods to yield a better understanding and improvement of the “webs of interwoven and hierarchical culture groups” that make up an organization (Jordan, 2009, p. 6). Specifically, diversity management remains a particular area that anthropologists are addressing, working with organizations to change their organizational cultures to “make better use of the talents and contributions of each employee” (Kogod, 2009, p. 27). Moreover, bringing anthropological perspectives to bear on issues of workplace diversity encourages the consideration of wider contextual factors: governance trends, fair-trade dynamics, international relations, etc. (Welker, Partridge, & Hardin, 2011).

Evolution of categorization. Human beings naturally categorize others into an in-group (a *we*) and an out-group (a *they*) and consequently favor ingroup members with regard to evaluations, acknowledgements, material resources, assisting, and social support (Dovidio, Kawakami, & Beach, 2001). Identifying and categorizing people into groups is a universal evolutionary facet of human perception necessary for efficient social functioning (MacDonald, 2001). The ability to sort people, spontaneously and with minimum effort or awareness, into a small number of meaningful categories is thus an essential survival skill (Brewer, 1988). Social categorization is a result of conscious and unconscious attractions and prejudices. The cooperative actions facilitated by in-group identification have both short- and long-term benefits, based mostly on the fact that ingroup members reciprocate such actions (Dovidio et al., 2001). The implications of social identification theories are considered further in the review of the sociological literature, but the following section outlines how such theories act as a framework for understanding organizations.

Diversity as a framework for understanding a community/organization.

According to social science literature, organizational culture represents a prime framework for understanding corporate communities and organizations. Given the varied and unique nature of these cultures, diversity itself has emerged as the basis for such frameworks (Findler et al., 2007; Jiřincová, 2013; R. Thomas, 1992; Triandis, 1995). Cox (1994) argued that demographic trends toward diversification, the incorporation of cross-functional work teams, global marketing, and multinational business operations validate the relevance and utility of diversity as a framework for understanding organizations and corporate culture. His *Interactional Model of Cultural*

Diversity provides a singular but important example of the ways in which diversity has become a foundational theoretical concept in the field. Overall, the work of Cox and others (Clayton, 2010; Jiřincová, 2013) reinforces the strong relationship between diversity and organizational culture. Additionally, Findler et al. (2007) provided another example of the centrality of diversity in theoretical frameworks. These researchers used diversity attributes to assess both the treatment and perceptions of employees (regarding inclusion, fairness, social support), thereby further connecting these to employee stress, organizational commitment, and job satisfaction.

Approach to understanding workplace cultures. In the context of workplace diversity, anthropological approaches provide meaningful methodologies of assessing (through ethnographic observation, interviews, etc.), analyzing, and interpreting the social dynamics of a corporate setting so that diversity may be managed strategically. Therefore, applying anthropological constructs involves the application of anthropological facts, viewpoints, theories, and means to identify, assess, and solve problems (van Willigen, 2002). Consequently, gaining a comprehensive understanding of the social dynamics defining a particular organization or work group allows inclusion-based interventions to be applied in order to maximize the benefits latent within diverse workforces.

Jordan (1995) has suggested that anthropological approaches to work settings effectively equate an organization to a culture and attend to three levels of structure and process: the individual, the group, and the organization. The level that addresses the individual focuses on individual behavior, including motivation. The level that addresses the group focuses on managing relationships among individuals, with special attention

paid to how groups form, their norms, and how they navigate conflict. At the organizational level, interest shifts to the purpose, structure, technology, and material environment that yield efficient functioning. Culture can be formed as a result of what it is or what it has (Smirich, 1983). The first approach is a functionalist one, seeing culture as something variable to be studied at the organizational level (Schultz & Hatch, 1992), whereas the second approach is symbolic, considering culture as a root metaphor for conceptualizing organizations (Kunda, 1992).

Social Perspectives

Interdisciplinary. In continuing the interdisciplinary exploration of diversity, the fields of sociology and social psychology offer numerous theories supported by empirical research on a range of topics and processes relevant to workplace diversity management. The two primary viewpoints used to explain the effects of diversity at group levels are the social categorization perspective (used to explain negative effects of diversity) and the information-processing perspective (a basis for the positive effects of diversity; De Dreu & West, 2001). The social categorization standpoint contends that people perceive similarities with others as indicating in-group status, and perceive differences as indicative of out-group status. This perceptual process means that actual differences between members of the same category are minimized and even ignored (Tajfel, 1969), whereas between-group differences tend to become exaggerated (J. Turner, 1985). As a consequence, people are less trusting of and cohesive with out-group members, which means that diversity can result in greater relational conflicts and more negative effects (Jehn et al., 1999). To provide further evidence of the relational impact of perceived group membership, it has also been shown that people retain in rich

detail information about ingroup versus out-group members (Park & Rothbart, 1982). In-group members are reported to have an easier time remembering data about those that are similar to them versus those who are out-group and different (Wilder, 1981). A second perspective is the information-processing perspective. This point of view connotes that diverse employees have access to a broad range of knowledge, skills, and abilities, along with different opinions, leading to enriched innovation and creativity leading to performance that exceeds the less diverse and more similar groups (De Dreu & West, 2001).

Acceptance, belonging, and inclusion (membership). Building upon the theories presented previously, membership and belonging (both actual and perceived) represent critical elements related to performance outcomes and effectiveness of groups. Begen and Turner-Cobb (2015) concluded that seeking to increase belonging via inclusion produces adaptive physiological and psychological outcomes, finding that experiences of inclusion decrease heart rate and negative mood while increasing social self-esteem. Social self-esteem and connections within organizations are important determinants of workplace mobility (Podolny & Baron, 1997), particularly those cultivated through mentorship (Colley, 2003).

Psychological Impacts

Having established inclusion as a primary factor in organizational culture and corporate social dynamics, insights gleaned from theories and studies in psychology may be used to further explore the implications of exclusionary practices and experiences. The literature identifies that a relationship exists among visible diversity

elements, sense of inclusion, equity, and well being (Mor Barak & Levin, 2002).

Workplace interactions may be a significant factor in diverse employees' well being.

Social. The literature relative to social inclusion and exclusion has generally concluded that being a member of a minority group has material impact on affective experiences in diverse organizational environments, often leading to feelings of isolation (Chrobot-Mason, 2004; Vallas, 2003). Indeed, whereas inclusion and the sense of belonging that it generates have been shown to increase social self-esteem, decrease negative mood (Begen & Turner-Cobb, 2015), and increase trust (Hillebrant, Sebastian & Blakemore, 2011), exclusion can lead to a host of negative social outcomes. When an employee experiences workplace exclusion, it is noted that his/her engagement, well-being, and commitment to serve the organization is negatively impacted (Foley, Hang-Yue, & Wong, 2005; Friedman & Holtom, 2002; Mor Barak et al., 2003).

Physical. Similar to findings on the social consequences of inclusion and exclusion, inclusion also results in adaptive physiological and psychological outcomes, whereas exclusion is linked to several negative effects. Exclusion not only is a factor in social dynamics, but also has profound physiological implications that further impact interactions in a workplace. Scientific research has shown that those who have experienced exclusion have a greater propensity to exhibit aggressive behavior (Buckley, Winkel, & Leary, 2004) and are less likely to act in prosocial (cooperative, helpful) ways (Baumeister, Twenge, & Nuss, 2005). Heart rates have been shown to increase in response to exclusion (Sommer, Kirkland, Newman, Estrella, & Andreassi, 2009), as have decreases in the ability to apply logic and reason (Baumeister et al., 2005).

Psychological. The literature provides conclusive evidence of the relationship between exclusion and psychological well being (Greenhaus, Parasuraman, & Wormley, 1990; Mor Barak et al., 1998). People who have been ostracized and/or excluded display a broad range of distress and pathology (K. Williams, 2007), and exclusion has been experimentally linked to lower self-esteem (Gerber & Wheeler, 2009; Leary, 2007).

Unconscious bias. Unconscious bias is thought to be a systemic way of excluding diversity (Dass & Partner, 1999). Experimental psychology has demonstrated that unconscious bias is pervasive and is a factor of workplace inequality (Kalev, Dobbin & Kelly, 2006). The social identity theory described previously highlights some of the primary unconscious biases affecting human behavior and perception in contexts of diversity (Tajfel & Turner, 1986; J. Turner, 1987). Implicit attitudes are defined as subconscious beliefs that are automatically activated by the presence of an *attitude object* (i.e., others; Dovidio et al., 2001; Killen, McGlothlin, & Henning, 2008). Prejudice and bias are often tied to these implicit, unconscious attitudes. To that end, one elevates the perceived value of one's own group over other groups (Operario & Fiske, 1998). Therefore, it is not surprising that substantial social psychological research demonstrates that groups (particularly racial or ethnic groups) often have negative unconscious biases about individuals from groups different than their own (Greenwald et al., 2002).

Efficacy. Corporate diversity management systems often involve various elements, including documented statements regarding diversity, sensitivity and diversity training, and monitoring talent acquisition, career trajectories, and compensation

stratifications by demographic elements (Armstrong et al., 2010). When the efficacy of these systems is evaluated, it appears that organizations lacking comparable systems experience disproportionate attrition and increased replacement costs, lower return on their training investments, poor brand and employer image, and increased litigation (Hubbard, 2004b). Additionally, many have found that organizations employing diversity and equality management systems (DEMS) have higher levels of employee output, increased workforce innovation, and decreased voluntary turnover (Armstrong et al., 2010; Jackson, Joshi, & Erhardt, 2003; Kochan et al., 2003). Diversity training has also been shown to facilitate a decrease in behaviors in which differences are avoided (Armour, Bain, & Rubio, 2004) and an increase in diversity-related knowledge (relating to issues such as stereotypes, discrimination, etc. (Holladay, 2004; L. Roberson, Kulik, & Pepper, 2001). In summary, workforce diversity may energize individual performance, increase identification and commitment to an organization, increase employee output and engagement, and reduce voluntary transitions (McKay, Avery, & Morris, 2009).

It may also be useful to consider the reasons for failed or ineffective diversity training or management initiatives. One of the central reasons cited for failure relates to motivation. For example, if companies opt to offer diversity training or programming as a result of external influence or the perfunctory adoption as a perceived human resources trend or fad, the effect may be marginal (Allen & Montgomery, 2001). Another reason for ineffective results is that organizations fail to implement a cohesive, comprehensive, and customized diversity training or management program. For positive effects to be achieved, inclusion interventions must consider the organization's unique culture,

strengths, weaknesses, and needs. A third cited reason why diversity and inclusion initiatives are not successful is that they focus solely and myopically on awareness training without providing employees with the requisite tools to apply the learnings.

Organizational Considerations

The literature reviewed thus far clearly indicates the potential impact of diversity and inclusion in the workplace and has explored the current and developing focus on these themes in corporate contexts. The intentional and focused management of diversity started in the United States and Canada (Agocs & Burr, 1996; Foldy, 2002). Diversity management is essentially a committed and systematic effort to acquire, retain, and engage employees from broad backgrounds (R. Thomas, 1992). Although approaches to diversity management differ among organizations and sectors, one common strategy that has often been deployed is the establishment of a position (commonly referred to as the CDO) dedicated to tasks associated specifically with diversity.

Chief Diversity Officer (CDO). The CDO role is an executive level position primarily responsible for the strategic guidance and oversight of the planning and leveraging of organizational diversity against the backdrop of an inclusive workplace (Leon, 2014). CDOs are “instruments of change” (Wilson, 2013, p. 435) charged with steering an organization towards sustained diversity and inclusion. Given the breadth of tasks and responsibilities associated with this charge, it is not surprising that this position is multifaceted. CDOs bear a tremendous responsibility to educate the organization on matters related to diversity and navigate through unpredictable channels in order to enact change (Wilson, 2013).

A number of factors have been identified as the driving forces behind the development of CDO positions. In higher education contexts, these include shifting demographics, the evolution of a knowledge-based economy, systemic social injustice, and graduates having to be prepared to lead in a global economy (D. Williams & Wade-Golden, 2007a). Essentially, a CDO is “a senior administrator who guides, coordinates, leads, enhances, and at times supervises the formal diversity capabilities of the institution in an effort to build sustainable capacity to achieve an environment that is inclusive and excellent for all” (D. Williams & Wade-Golden, 2007b, p. 8). D. Williams and Wade-Golden (2007b) have identified three basic archetypes of CDO structures: the Collaborative Officer Model, the Unit-Based Model, and the Portfolio Divisional Model. Regardless of which model an organization adopts, the CDO plays an essential role in diversity planning and implementation, acting as the chief point person for diversity issues and fulfilling the role of a relational leader, coordinating initiatives and networks that include the entire organization structure (D. Williams & Wade-Golden, 2007a). Many factors affect the roles played by a CDO, such as his/her individual qualifications and leadership competencies, organizational culture, scope of authority, type of institution, institutional commitment to diversity, and availability of resources (Stanley, 2014).

Responsibilities. The core responsibility of a CDO is to mobilize the organization to derive the benefits gained from a diverse workforce. Betters-Reed and Moore (1992) suggested that this process involves cultivating communal respect, collaborative work styles, and employee enablement with an organization. The CDO’s ability to fulfill these responsibilities is aligned with a number of organizational factors,

including organizational rank, access to resources and support staff, and reporting structures (Stanley, 2014). Organizational rank and the scope of positional authority are imperative in determining the CDO's ability to build partnerships and direct the work of others (Leon, 2014). CDOs must forge and maintain productive partnerships with employees at all levels of the organization, as well as with external partners and potential organization members. In many cases, where these partnerships are formed, the employees serve as ambassadors for diversity within their organizations.

Resources. The existence and allocation of resources are undoubtedly significant determinants of the CDO's capacity to effect change. In academic contexts, it has been found that CDOs often lack the support staff necessary to effectively perform their jobs (D. Williams & Wade-Golden, 2013). The unique attributes of each institution and organization underscore the fact that the resources required and available are understandably not uniform for all CDO positions (Stanley, 2014). Minimally, the allocated resources must ensure that the CDO has the means for assessing the institution's subtleties and requirements for diversity (Wilson, 2013).

Workplace systems and structures. The emergence of positions such as CDOs belies the focused need to embed diversity-related initiatives across a range of organizational contexts. Diversity management constructs exist in private and public corporate sectors, ranging from universities and hospitals to Fortune 500 companies and nonprofit organizations. In the sections to follow, practices that both enhance and obstruct inclusion are examined, followed by a discussion of best practices related to inclusive workplace structures.

Practices to create alignment with inclusion. Corporations voluntarily initiated the concept of organizational inclusion to attract and retain talent from historically underrepresented groups (Konrad et al., 2005). Over time, diversity has come to be considered a strategic asset that, if managed effectively, may provide competitive advantage and other beneficial outcomes (Boxenbaum, 2006; Cox & Blake, 1991; Kelly & Dobbin, 1998; Zanoni et al., 2010). Inclusion has emerged as an increasingly essential aspect of organizational culture that leverages diversity. A Harvard Business Review study of Fortune 500 CEOs found that CEOs “resoundingly agreed” (Groysberg & Connolly, 2013, p. 73) on the elements of defining inclusive culture. These executives defined an inclusive culture as one in which employees displaying their authentic selves can participate freely in the company’s success. Additionally, the company demonstrates respect for their employee’s unique qualities and uses their talents as an advantage (Groysberg & Connolly, 2013). These characteristics are achieved through various practices beginning with the countering of unconscious bias.

Social identity theories highlight that it is human nature to prefer one’s own group (Brewer & Brown, 1998). It has been suggested that the preference of one’s own group versus other groups is a common social dynamic. Therefore, organizations should not only be aware of such dynamics but also work toward mitigating their effects (Konrad et al., 2005). One suggested method for countering in-group bias is to cultivate shared goals at the organizational level. This strategy creates focused attention on the collective with the intent of establishing a common or shared identity. Additionally, nurturing a single group focus has been shown to reduce negative intergroup affective reaction and bias and support positive behavioral orientations, such as institutional

commitment (Dovidio et al., 2001). Admittedly, emphasizing shared goals may not be sufficient to counter all of the challenges facing diverse teams; however, as Konrad et al. (2005) have argued, it is a practice that lays a strong foundation for additional inclusion efforts.

Additional practices relate to the core inclusionary principle of valuing difference. Mor Barak (2000a) contended that “valuing diversity goes beyond the golden rule of treating others as you wish to be treated yourself, because it involves a higher behavior, one that is receiver-centered rather than self-centered” (p. 344). Thus, practices supporting inclusion will provide employees with collaborative opportunities that allow them to both give and receive, share their personal perspectives, contribute actively to team processes, and be of service to co-workers, one the one hand, and defer to others and rely on the cooperation and support of others within the workplace, on the other.

Practices that create misalignment with inclusion. Although the aforementioned practices strive to create alignment with inclusion, other practices may serve as obstacles to establishing an inclusive organizational culture. Building on the distinctions between diversity and inclusion established at the start of this review, Marina (2005) noted that simply hiring a diverse workforce will not create an inclusive organizational culture. Diversity on its own can actually create conflict, particularly in the areas of communication and turnover rates (O'Reilly, Caldwell, & Barnett, 1989). Thus, in order for organizations to “capitalize on the benefits of a diverse workforce, those conflicts must be actively managed in a culturally sensitive manner” (Marina, 2005, p.46). Therefore, an important practice that supports inclusion is to have a comprehensive diversity management plan in place that factors in all levels of the

organization and assures that diversity goals are known, shared, and in line with wider organization goals.

Identification of best practices. With consideration of the interdisciplinary approaches explored heretofore, best practices may be identified with key touch points of the talent management lifecycle. Those addressed subsequently include recruitment, branding, learning and development, health and welfare, performance, and succession planning.

Talent acquisition/recruitment. The purpose of recruiting diverse talent is to embed a diverse set of perspectives within the organization in an effort to enhance organizational performance both internally (decision making) and externally (customer outreach; Kulik & Roberson, 2008). As Gilrane, McCausland, King, and Jones (2013) suggested, the primary goals of diversity recruitment strategies are to increase the diversity within the talent pipeline of potential applicants (Rynes & Barber, 1990) and to create positive impressions of the organization among potential applicants (Ehrhart & Ziegert, 2005). Achieving these goals and successfully managing to recruit diverse applicants benefits organizations by providing them access to larger pools of potential employees (Niederle, Segal, & Vesterlund, 2013). One recruitment strategy that is often effective is to rely on internal networks to harness an external network of appropriate candidates (Shaheen, 2010). Shaheen (2010) additionally noted that these goals cannot be deployed effectively without concomitantly addressing sound internal retention and development strategies.

Branding. Employer branding represents the benefits that prospective employees may associate with a specific organization (Wilden, Gudergan, & Lings,

2010). For the employer, effective branding involves clarifying and messaging the unique *employment experience* it offers to its employees (Edwards, 2010). Therefore, branding is an important element of establishing an organization as diverse and inclusive. Avery (2003) suggested that organizational advertisements incorporating demographically diverse imagery may, in fact, enhance organizational attractiveness for diverse employees. Additionally, including a strong diversity statement in job postings and recruitment advertisements that is genuinely reflective of organizational ethos is another element of effective branding. Research shows that both those from minority and non-minority demographic groups view organizations with a diversity statement positively (Kim & Gelfand, 2003).

Learning and development. Mentoring is a practice used to both retain and develop diverse employees (Kulik & Roberson, 2008). The effectiveness of mentorship programs rests in the fact that these mentoring relationships often affect perceptions of discrimination and social inclusion (Friedman & Holtom, 2002; Friedman, Kane, & Cornfield, 1998) and may mitigate the negative effects of stereotype threats on minority performance (Good, Aronson, & Inzlicht, 2003). Group mentoring, as opposed to dyadic mentor structures, has been shown to be particularly effective for enhancing organizational outcomes (Kulik & Roberson, 2008). Group mentorship includes *network groups*, which are groups established around demographic similarities (i.e., gender, ethnicity; Brooks & Clunis, 2007).

Performance management. Although previous sections of this review presented research suggesting that diversity may negatively impact corporate performance and outcomes (Jehn et al., 1999), others have found that conflict and tension in even very

diverse groups are reduced as members of the team spend more time together and establish norms of interaction (Chatman & Flynn, 2001). It is not uncommon for diverse teams to have enhanced performance as a result of their developing a common identity (Earley & Mosakowski, 2000). Other researchers have also shown that members of diverse teams come to respect and appreciate group complementarities, learning over time to capitalize on differences in behavior, values, and beliefs (Hambrick, Davison, Snell, & Snow, 1998) and thereby improve communication and cooperation (Nielsen & Nielsen, 2013). Another important factor determining performance is diversity climate. McKay and colleagues (2008) defined a diverse environment as the “degree to which a firm advocates fair human resource policies and socially integrates underrepresented employees” (p. 350). Employees’ perceptions of a diverse environment significantly impact their job-related attitudes and behaviors (Hicks-Clarke & Iles, 2000) and, hence, performance (McKay, Avery, & Morris, 2008).

Given the existence of unconscious bias and in-group versus out-group dynamics, the assessment of performance may be an area of corporate life where inequalities persist. Thus, performance management strategies attuned to inclusion present an opportunity to establish more equitable working relationships (Lumby, 2009). In instances where diversity is potent in the workplace the end result impacts in a positive fashion not only the output of the employee, but also that of the company as well (McKay et al., 2008). Best practices related to performance management should therefore be attuned to an intentional and active management of diversity that aims to develop a strong diversity climate and provides ample opportunities for diverse teams to develop trust and communication norms over time.

Succession planning. One final area of the talent management cycle in which best practices may be identified is succession planning. Successful application in this realm revolves around a few elements including the engagement of involved mentors, organizing those demonstrating traits of success and deploying a strategic planning process to form an encouraging community (Groves, 2007). Overall, approaches to succession planning that consider the *talent pool* holistically as opposed to a *replacement* (position-specific) process tend to be more favorable (Carnazza, 1982). Additionally, integrated and inclusive approaches that draw on diversity, business, and human resource strategies have been deemed the most successful when it comes to succession planning (Greer & Virick, 2008). Greer and Virick (2008) outlined a number of best practices developed according to this type of integrated approach to succession planning. They suggested that alignment between business strategy and succession planning is the critical element of the foundation upon which a value basis for diverse succession can be built. To chronicle the process of leadership, leaders are encouraged to include fixed goals in line with diversity in evaluating the performance of managers and executives, as well as answerability for succession goals adopting diversity. Some of the applications relating to planning processes include delving into the organization for prospective candidates and using measurable behaviors, putting in place impartial testing barometers to avoid implicit social cognition. These development practices are centered on mentor/mentee of the same race and same gender, which may open the door for diverse high potentials to be exposed to those executives which could lead to an increased awareness of diverse talent. Finally, program management practices that are deemed most effective include monitoring the career movement of diverse

successors into business critical core areas as opposed to peripheral administrative areas and evaluating diverse succession planning with multiple metrics such as retention, development, advancement, and size of the “ready now” (Greer & Virick, 2008, p. 364) talent pool. It is apparent that many of the best practices related to succession planning, as with the other dimensions of diversity management, are complex and multifaceted. Once facet connecting them, however, is their foundation in ethical values and principles.

Core values and operating principles. The United Nations Educational, Scientific, and Cultural Organization (UNESCO, 2009) has linked cultural diversity to economic growth, as well as to intellectual, emotional, and moral satisfaction, characterizing it as necessary for humans as biodiversity is for nature. Gilbert, Stead, and Ivancevich (1999) emphasized the ethical basis of diversity and identified three ethical principles required to undergird successful diversity initiatives. The first principle is called the *Golden Rule*, which means to treat others as you wish to be treated. The second principle is called the *Disclosure Rule*, which essentially assesses the decision maker’s comfort with his/her decisions being exposed. The *Rights Approach* could be construed as the freedom rule, affording all the choice of how they live their lives. The work of Pless and Maak (2004) uses a moral theory of recognition as the basis for a framework of inclusion that emphasizes doctrines of acknowledgement, shared understanding and enabling, and plurality, coupled with trust and integrity. Olsen and Martins (2012) characterized diversity management as a socially responsible endeavor, using the concept of *dual-value integration* to describe organizations that value diversity both as a continual process and as an end goal. Although others have also insisted

upon the ethical nature of inclusion (Nelson, Poms, & Wolf, 2012), conceptualizing it as a moral imperative toward eliminating group-based barriers to opportunity and supporting individuals to achieve their fullest potential (Ferdman & Brody, 1996), some have suggested that the rise of the business case (to be discussed in a subsequent section of this review) has compromised this ethical focus (Gotsis & Kortezi, 2013; Johns, Green, & Powell, 2012; Kirton & Greene, 2009; Martín-Alcázar, Romero-Fernández, & Sánchez-Gardey, 2012).

Kirton and Greene (2009) acknowledged that a business or economic framing of inclusion has established its legitimacy, but worry that much is being lost when diversity and inclusion are used only as neo-liberal rhetorical strategies. From Perriton's (2009) perspective, the business case invalidates inclusion as an adequate and appropriate response to social justice issues. According to Gotsis and Kortezi (2013), the efficiency and profit-driven motivations underlying much diversity management replicates social differences and exacerbates socio-demographic inequalities. In this sense, they contend that the business case's conceptualization of inclusion does little to affirm the value of difference or encourage pro-diversity beliefs. By way of response, they advocate both an ethical framework and a philosophical context for diversity management practices that would transform diversity management practices into an intentional system aimed at serving employees rather than organizational bottom lines.

Compassion. For the most part, compassion has been an overlooked element of workplace culture (Kanov et al., 2004). Compassion is rooted in the recognition of equality and commonality between all individuals (Lord & Hutchinson, 2007).

Workplace compassion makes people feel acknowledged and known (Kanov et al., 2004). It would follow, then, that compassion is a competency of inclusion.

The ethical foundations of inclusion in corporate contexts are widely recognized, despite the fact that some argue they are composed of particular conceptualizations (namely the business case). As K. Jones, King, Nelson, Geller, and Bowes-Sperry (2013) argued, diversity training and management represent moral imperatives that support the ethical development of employees as well as the organization as a whole by institutionalizing compassionate practices that reduce discrimination and champion inclusion. The importance of leadership will be discussed subsequently, but Lippert (1994) suggested that:

If a leader's vision is rooted in love of neighbor and a sense of justice, that leader will find ways to enhance employee participation and will set in motion the practices that will attract, retain, and promote capable personnel with diverse backgrounds. Genuine respect for an employee as a person who bears responsibilities that extend beyond workplace production will set the tone for positive interaction among employees. Thus managers' display of appreciation will inspire loyalty and a cooperative spirit. (p. 27)

Thus, the moral basis of inclusion is not limited to universal interpersonal relationships, but instead is linked directly to the corporate world, given that the economic outcomes of businesses are tied directly to the most important of resources: the people that make up a company.

As much of the literature acknowledges, the involvement and support of all levels of organizational hierarchies are essential for effective diversity management (Cox &

Blake, 1991; Dass & Parker, 1996; Ng, 2008; Richard, Kochan, & McMillan-Capehart, 2002). Defined as a “process whereby an individual influences a group of individuals to achieve a common goal” (Northouse, 2007, p. 3), leadership is a crucial component of diversity management, and a decisive factor that influences the success rates of diversity initiatives (Morrison, Ruderman, & Hughes-James, 1993; Wheeler, 1994). The literature also points to the special role played by top executives and senior management in instigating organizational change. *Upper-echelon theory* proposes that executives see their situations based on their personal experiences and beliefs (Hambrick & Mason, 1984). Thus, commitment, engagement, and the visible participation of an organization’s leaders in diversity training and management are essential not only in establishing inclusion, but also in ensuring that an organization can capitalize on diversity and benefit economically as well as socially from its inclusive practices. Ng (2008) theorized that there is a connection between a CEO's commitment to a company and said company's diversity practices; with a low level of engagement from a CEO, there is little external influence to generate diversity in the workplace. Commitment in this case is multifaceted and involves allocating more resources to accomplishing training goals, considering diversity training as part of the business strategy, assessing the organization’s needs before as well as following the training, and serving as a model for employees (Ferdman & Brody, 1996). Because corporate cultural shifts are typically reactionary responses to internal social conflicts, change and the commitment to it must be based on a longer term trajectory. Thus, the execution of transformation requires knowledge, tenacity, and thoughtful enactment (Lappetito, 1994).

In considering not only the role of top management but also the placement of diversity officers within the organizational structure, it is clear that in addition to commitment and the modeling of behavior, perhaps the most essential factor in diversity leadership is access to decision making processes (Lieberman, 2006). Although CDOs themselves have highlighted the importance of institutional rank (Stanley, 2014) and most positions of this type are positioned high up in the organization, reporting directly to presidents or CEOs (Wheeler, 2001), Lieberman (2006) noted that, regardless of rank, diverse employees' access to information and decision making may still be lacking. Thus, diversity management leaders, irrespective of position or rank, must be imbued with decision making capacities if they are to be effective and drive institutional change successfully.

In general, although leadership has been studied extensively and abundant literature exists on the topic, there has not been as much literature regarding diversity in leadership theories and research. Instead of focusing solely on the role of leaders in diversity initiatives, the actual diversity of leaders themselves ought to be addressed. In the process, it would mean magnifying the customary leadership archetypes. These archetypes or paradigms include traits, situations, and systems to include those of individuals from diverse identity groups, examining what qualities leaders from such groups might bring to their styles of leadership that might be different from those of majority group leaders, and expanding the traits and contexts that might define effective leadership in a changing, global, and diverse society (Chin, 2010).

Impact of engagement. Overall, diversity training has been shown to increase self-engagement in diversity practices (De Meuse, Hostager, & O'Neill, 2007).

Research supports that there is an undisputed link among the degree to which organizational members feel accepted, their engagement, and ultimately, their satisfaction with the company (Lawler, 1994). There is a positive impact on recruitment, retention, and engagement of diverse employees, when there is an achievement of diversity visible in leadership. Additionally, visible diversity within leadership increases organizational output and innovation, which also improves decision-making and quality management (Allen & Montgomery, 2001).

Performance. Evidently, performance is positively affected by effective inclusion (as demonstrated previously), which shifts values and culture toward diversity-positive orientations that motivate personnel and inspire organizational commitment (Lumby, 2009). It has been demonstrated that wage disparities are less prevalent in environments where there is ethnic diversity; further, gender and ethnic inequities appeared less in groups in which managers included both women and people of color. Diversity within an organization's board has also been shown to positively affect financial indicators of firm performance (Erhardt, Werbel, & Shrader, 2003). Bantel (1993) reported that diversity creates a more competitive company; resulting from a larger base of knowledge, enhanced creativity and innovation, better performance and more strategic decision-making (Watson, Kumar, & Michealsen, 1993). In the banking sector, diversity has also been shown to impact firm performance positively (Richard, 2000). Thus, diversity is a potential resource that, when managed properly and supported by inclusive organizational cultures, may positively affect performance.

Business/financial. As referenced previously, the business case is a particular model of diversity management that reframes its objective in terms of quantifiable

organizational improvements and economic performance advances (Litvin, 2006). Although diversity was defined previously in exclusively moral and humanitarian terms, during the 1990s through the early 2000s, corporate rationale began to frame diversity in economic terms and as a necessary means of competing globally, capitalizing on the massive domestic spending power of ethnic and racially diverse groups (Thomas, 2004; D. Williams & Wade-Golden, 2007b). Diversity's contribution can be distinguished by four factors: increasing revenue, enhancing compliance, augmenting corporate social responsibility, and promoting an authentic and credible belief that it is "the right thing to do" (Orenstein, 2005, p.22). Thus, the business case of diversity is tied to the networks of diverse individuals (Acosta, 2004), and that diverse employees function as a source of sustained competitive advantage (Richard, 2000). Prasad and Mills (1997) suggested that the business case gives greater legitimacy than a purely moral imperative and is a viable long-term strategy that yields substantial economic benefits. In reflecting market forces (Foster, Jackson, Cross, Jackson, & Hardiman, 1988; Johnston & Packer, 1987) and enabling organizations to leverage the skills of their employees (O'Leary & Weathington, 2006), the business case sets up diversity as a necessary corporate strategy (Prasad & Mills, 1997) that may lead to cost savings and other competitive advantages (Simons & Pelled, 1999).

Measurement and empirical evidence. Although the business case for diversity has been studied extensively, many remain unconvinced (Hansen, 2003; Kochan et al., 2003). An examination of this area of research found revealed six out of 10 of the studies exploring the relationship between diversity and performance were unfounded, two of 10 were positive, and two of 10 were negative (Joshi & Roh, 2009). It has also

been found that correlation is stronger in service-based industries, likely due to the higher rates of interpersonal interaction therein (McMahon, 2011; Richard, Murthi, & Ismail, 2007). However, this range of findings does not completely discount the substantial number of studies that do provide evidence of the economic value of diversity. Homogenous work environments have consistently underperformed those that are diverse, whether ethnically, demographically, or culturally (Kirchmeyer & McLellan, 1991; Loden & Rosener, 1991; Prasad & Mills, 1997). Demographically heterogeneous groups have been shown to behave more cooperatively (Cox, Lobel, & McLeod, 1991), be more innovative (O'Reilly, Williams, & Barsade, 1997), and generate higher-quality solutions (Kirchmeyer & Cohen, 1992).

Innovation and creativity. Organizations that develop diverse workforces often do so in order to access and exploit the critical resources represented by variations in experience and pluralities of worldview (Ortlieb & Sieben, 2013). In regard to innovation and creativity, Foster et al. (1988) pointed out that “organizations that invite change and successfully manage diversity are more likely to detect and solve complex business problems” (p. 39). Evidence suggests, then, that diverse cultural perspectives foster group-level environments of creativity and innovation (Bantel & Jackson, 1989; Paulus, 2000; Richard & Shelor, 2002).

Decision making improvements. Numerous studies have documented the superior decision making ability of groups with diversity versus groups where there is no diversity (McLeod, Lobel, & Cox, 1996; Watson et al., 1993). In fact, the term *diversity capital advantage* was coined to describe the phenomenon whereby an organization defined by diverse demographic groups outperforms its peers relative to the

accessibility of a variety of knowledge, skills, and perspectives. *Diversity process advantage* is used to describe an improvement in the resolution of problems, social integration, and communication processes derived from diverse workforces that enable the more efficient and effective execution of operations (Yang, 2005). Functionally diverse teams have also been shown to develop clearer strategies than non-diverse groups (Bantel, 1993).

Employee engagement. Employee engagement is recognized as a vital business enabler of organizational success (Lockwood, 2007). Some studies have shown that demographic similarity is associated with greater workplace satisfaction and commitment (Verkuyten, de Jong, & Masson, 1993); however, Jones and Harter (2005) suggested that “measuring and improving employee engagement and interpersonal congruence may provide an avenue by which diversity is transformed from a weakness to a strength” (p. 87). Indeed, Jehn et al. (1999) found that diversity in general does not affect organizational performance uniformly. Based on a field study of 92 work teams, three types of diversity were noted: social category diversity, informational diversity, and value diversity. Group performance is most influenced by informational diversity, and group morale is most influenced by social category diversity. Only value diversity had a negative impact, decreasing satisfaction, intent to remain, and commitment to the group. Thus, it appears that minimizing diversity in terms of values would go a long way toward harnessing the positive contributions diversity stands to make to employee engagement. Management also plays an important role in engagement because, as Jones and Harter (2005) demonstrated, when employees were involved in cross-race mentorship dyads with managers, they expressed stronger intentions to remain in their

organizations than employees from their same cohorts who were in same-race dyads. The Corporate Leadership Council (2004) has also noted that managers showing a strong commitment to diversity promote employee engagement.

Industry examples and learnings. In legal contexts, both gender diversity and racial diversity in the boardroom affect firm performance positively (Erhardt et al., 2003). Richard et al. (2007) found that racial diversity and performance are defined by a curvilinear positive relationship at low and high levels of diversity, but not at an intermediate level of diversity. However, in the long-term in stable environments, the relationship becomes linear and positive. This finding indicates that consistent and sustained efforts to nurture and maintain corporate diversity pay off over time.

Public sector. An example of the effects of diversity management in the public sector comes from the International Monetary Fund (IMF), an entity founded in July 1944 at the United Nations conference. The intent of the entity was to promote international financial stability and monetary cooperation. Mor Barak (2015) explained that, with the failure to forecast the global financial crisis of 2008, the organization conducted an internal review, determining that change was needed for the inward-looking culture of the IMF by increasing the diversity of the workforce and creating a workplace that encouraged contrary perspectives and thoughts. Evidently, some of the failings of the agency were connected to a lack of diversity, motivating the executive board to publically express a commitment to “fostering staff diversity in all its dimensions, including diversity of opinions” (Independent Evaluation Office, as cited in Mor Barak, 2015, p. 86).

Private sector. The private sector is replete with examples of diversity management approaches and results. Generally speaking, firms within the hospitality and tourism sector invest more in diversity management than non-hospitality firms, largely due to the fact that, as stated previously, diversity has been shown to be more consequential in service-related industries than in manufacturing or other sectors (Richard et al., 2007; Singal, 2014). However, plenty of examples may be found among multinational organizations, Colgate-Palmolive being one. This U.S.-based company operates in 170 countries and has been challenged in its efforts to translate its American valuing of diversity to the international arena (Mor Barak, 2000b). As a means of tackling the problem of the resistance the company was experiencing from affiliates in more ethnically homogenous (for example, Japan) or gender divided (for example, in Saudi Arabia) contexts, the company launched a training program called *Valuing Colgate People* for people managers globally. Instead of adopting a U.S.-centric approach, the company demonstrated inclusion by identifying the requirements within each country. Then, through cross-cultural collaboration, it managed to retain its core inclusion policies (banning discrimination and sexual harassment) while incorporating the values and perspectives of its international workforce (Mor Barak, 2000b).

Microsoft Corp. provides another example of effective corporate diversity strategies, specifically its diversity department, created to support the company's vision of "maximizing the company's performance through understanding and valuing differences" (Allen & Montgomery, 2001, p. 156). Microsoft is committed to diversifying its workforce and considers a singular point of view to be disadvantageous in a globalized market place. This commitment is reflected in the company's Diversity

Advisory Council, which targets a number of specific groups (i.e., women; employees with disabilities; gay, lesbian, bisexual, and transgender employees; as well as various national/ethnic groups) and continually working to ensure that Microsoft remains an appealing place for all to work (Allen & Montgomery, 2001).

Best Practices to Create Inclusion

An analysis of the literature reviewed previously may reveal a series of best practices for creating inclusive corporate environments. The following sections outline key practice areas and strategies deemed most effective in those areas. Following this presentation of best practice areas, complete sets of practices proposed in the literature are also considered.

Assessment and metrics. An essential step in establishing appropriate diversity management strategies is the performance of a needs analysis, which will allow an organization to identify the particular issues that should be addressed. Subsequently, this analysis will guide decisions regarding the most appropriate actions to be taken in relation to the particular needs of an organization (Gilrane et al., 2013; Koonce, 2001; Larkin Ford, 2004). The particular advantage of attending to needs assessments is that diversity interventions and strategies may be tailored to context-specific needs (L. Roberson et al., 2003). A related crucial step that complements needs assessments is compiling and analyzing metrics that allow the effectiveness of the diversity initiative to be measured and assessed (Babcock, 2006).

Comprehensiveness. A second key element of best practices is comprehensiveness, which Bendick, Egan, and Lofhjelm (2001) have defined in terms of nine key benchmarks related to diversity training:

1. Strong support from top management;
2. Tailors to each client organization;
3. Links diversity to central operating goals;
4. Trainers/officers are managerial or organization development professionals;
5. All levels of employees are enrolled in trainings;
6. Training discusses discrimination as a general process;
7. Training explicitly addresses individual behavior;
8. Training is complemented by changes in human resource practices;
9. Training impacts the corporate culture. (pp. 18-21)

This list of training-related best practices underscores the importance of diversity management being conceptually grounded and combining behavioral changes with policy and procedural reforms, in addition to selective changes in personnel in order to achieve extensive changes in the corporate culture. Enrolling employees from all levels and all departments is indispensable when establishing an inclusive organizational culture. Also essential for effective diversity training and management is an emphasis on the social methods associated with inclusion versus exclusion on general psychological and social processes of inclusion and exclusion (i.e., stereotyping, own group preference, insular thinking, etc.), rather than focusing on specific groups' experiences.

Don't be *color blind*. The notion of *color blindness* refers to the downplaying or ignoring of individual differences. Lippert (1994) asserts that race, gender, and cultural differences cannot continue to be ignored. Rather, these differences should be deemed central to a larger snapshot of our population. She went on to assert that

diversity leaders are responsible for fostering the acceptance, as opposed to the assimilation, of differences. To overlook color denigrates the long and arduous history of economic and cultural differences that are the byproduct of discrimination against minorities and the underprivileged. It must not be overlooked that these same gender and cultural differences are perceived in the real world as a sense of fulfillment (Konrad et al., 2005). Thomas, Mack, and Montigliani (2004) additionally warned that the color-blind approach can provide the pathway to -isms such as racism and sexism.

Address the specificities of context. A fourth area of best practice relates to paying close attention to the specificities of particular contextual factors, on both a micro- and macro-level. Mor Barak (2000b) asserted that diversity is not solely about the organization but the systems inherent within it. Indeed, macro contexts (related to history and broad socio-political processes) are crucial for understanding workplace diversity. To this effect, considering social meanings and power dynamics on a wide scale is vital for understanding how diversity initiatives may best be implemented in a particular organization.

Develop collaborative, inter-disciplinary networks. Practices that rely on and encourage collaboration between various sources provide opportunities for learning and insight that aid diversification efforts. Earlier sections of this review have demonstrated the benefits of consulting with researchers and practitioners from a variety of fields. Partnerships across a wider range of sectors create opportunities for considering alternative perspectives, approaches, and theories that only stand to increase management knowledge (Holvino & Kamp, 2009).

Extensive involvement of top management. One of the most consistent findings throughout the literature is the importance of top management engagement and support. Given the critical role that organizational leaders play in shaping the climate of an organization, their full support is necessary for effective diversity management (Hayes, 1999; Schmidt, 2004; Sluss & Ashforth, 2007). Kreitz (2008) acknowledged that the commitment of senior leaders to organizational changes toward inclusion creates the capacity for more effective changes on individual levels. Part of involving management in diversification and inclusion efforts is mentoring, a system that previous sections of this review have highlighted as an important element of successful diversity management. Moreover, mentoring provides opportunities for people from different backgrounds to interact, which helps to reduce stereotypes and broaden knowledge and perspective (Blum, Ben, Fang-Yi, 2003; Slone, Tarrasch, & Hallis, 2000).

These six areas of best practice reflect the complexity involved in diversity management and provide guidelines for organizational reform. Several authors have compiled independent best practice lists that, in many instances, overlap with the practices detailed previously. However, in considering their contributions, an even broader understanding of the efforts required and the most effective means of creating an inclusive work environment may be achieved.

In 2005, the U.S. Government Accountability Office published a set of nine best practices for diversity management. Their list includes:

1. Engagement of executives whereby they can adroitly and authentically communicate a compelling vision of the desired outcomes.
2. Diversity is embedded in the organizational strategic imperatives.

3. There is enterprise-wide understanding and acceptance of the positive impact diversity can have on outcomes and performance.
4. Quantitative and qualitative measures are requisite.
5. Executives are accountable for the success and progress of diversity.
6. Succession planning is critical to the organization's ability to identify and develop diverse talent.
7. Talent acquisition is the organizational lifeblood and requires diverse candidate pipelines of talent.
8. Employee engagement and accountability necessitate that all levels within the organization are engaged and held accountable for the inclusion of diverse employees.
9. Learning and development highlights the organization's initiatives to consistently educate its members on the benefits, expectations, and outcomes associated with diversity.

In 2009, the Society for Human Resource Management (SHRM) published their own best practices list relating to diversity and inclusion on a global scale. Best practices were highlighted in terms of four major categories: (a) management structure, (b) metrics and rewards, (c) internal communications and training, and (d) external outreach. Based on interviews with top American CEOs, Groysberg and Connolly (2013) summarized responses regarding which practices they have found to be most effective in harnessing diversity. Their list includes:

1. Measurement
2. Accountability

3. Diverse candidate pools
4. Scheduling flexibility
5. Promotion of diverse employees
6. Training
7. Employee affinity groups
8. Offer quality role models.
9. Make the chief diversity officer position count. (pp. 73-76)

After evaluating existing literature on which best practices related to diversity have the most efficacy, Kalev et al. (2006) determined that three essential mechanisms exist for correcting workplace inequality:

1. Creating specialized positions to achieve new goals.
2. Deploying learning to mitigate bias.
3. Organizational goals focusing on those who have been underrepresented.

In considering these various articulations of best practices, it is clear that many similarities exist, creating a general consensus on the core practices that have been shown to be most effective in the field of diversity management. With that being said, it has also been suggested “there is no single best way, but that the organization’s approach depends on the degree of pressure for diversity, the type of diversity in question, and managerial attitudes” (Dass & Parker, 1999, p. 68). Thus, although many best practices related to diversity and inclusion have been identified and elaborated across a range of fields, their truest value may lie in their ability to function as guidelines and as frameworks to be adapted to the particular contexts, issues, and intentions of a given organization.

Global Considerations

Echoing the conclusion stated previously, Dass and Parker (1991) stated that “the best approach to diversity management is particular rather than universal” (p. 68). Indeed, as globalization continues to shape economic and social processes of exchange, diversity and inclusion have become ever more important, yet the solutions to the challenges associated with each of these areas may be best realized on particular, local levels. This interplay of global and local, universal and particular, is a defining characteristic of diversity work given that improving organization-level performance is simultaneously connected to lower level individual-based interactions, as well as to broad level political and social dynamics. Sharp, Franzway, Mills, and Gill (2012) critiqued diversity management as it fails to acknowledge that the underlying problem is political and therefore, addressing it would necessitate confronting the dominant gender and power relations. Moreover, as previous sections of this review revealed, major differences exist in the ways in which diversity, equality, and inclusion are conceptualized and valued (or devalued) in various contexts around the world.

Summary

This review has considered a range of empirical and theoretical literature across an array of fields in order to develop a set of best practices related to establishing diverse and inclusive corporate environments. Although diversity is a descriptive term denoting differences of various types and across multiple dimensions, inclusion is the experience in which employees feel valued in organizational contexts for their distinctive attributes, qualities, and ways of being. On the whole, when the complex nature of these concepts is considered, it may be concluded that when diversity is managed in a fair

and effective manner, positive outcomes are likely to be achieved (Armstrong et al., 2010). Certainly, if an organization implements diversity initiatives and inclusive policies in a comprehensive way—that is, in alignment with operational goals as well as employee well-being—then these efforts will be treated more seriously and yield greater and sustainable impacts. As the best practices presented previously demonstrate, these initiatives are most effective when broad implementation actions (i.e., appointing senior level leaders or cross functional teams that address cultural organizational changes) are combined and complemented with narrower actions (i.e., employee training programs that are purposed to facilitate behavior changes; Kreitz, 2008). In this regard, diversity management not only is a social imperative and a response to shifting workplace demographics, but also subsidizes financial performance and organizational success (Singal, 2014).

Chapter 3: Research Design and Methodology

Creating a work environment where diverse employees feel included is one of the primary objectives of the CDO. The CDO is charged with developing and executing the strategies to achieve inclusion by maximizing diversity. Understanding the practices of CDOs to promote inclusion and identify patterns associated with those practices can prove beneficial for other CDOs and their organizations. Uncovering how others have achieved success in this journey can provide a roadmap. In response to the need to improve diverse employees' connection to the workplace and participants, many CDOs are seeking to achieve full participation for everyone within their organizations. It is expected that by doing so, the organization will experience optimal performance (Kochan et al., 2003).

This grounded theory study considered and described the organizational behaviors and practices that facilitated participation by diverse employees. CDOs were asked to describe the strategies that their organizations had implemented that yielded workplace connection and involvement. Hedrick et al. (1993) asserted that descriptive studies provide for a picture of a phenomenon to show how characteristics are related to each other. It is expected that facilitating full participation of diverse employees will necessitate leveraging multiple strategies and characteristics.

The cornerstone of descriptive research is to accurately portray the characteristics of persons, situations, or groups (Polit & Hungler, 2004). Therefore, the descriptive data were mined and sorted to identify common themes. The identification of those themes will contribute additional literature to facilitate the journey to inclusion and enhance the well-being of diverse employees.

Nature of Study

This descriptive study employed a qualitative approach. The objective of qualitative descriptive studies is to provide a comprehensive summarization of specific events experienced by individuals or groups of individuals (Lambert & Lambert, 2012). Rather than testing a predicted relationship between variables, descriptive research describes variables within the phenomenon in which they appear (Polit & Hungler, 2004). Qualitative description provides value in the resulting knowledge. Additionally, it provides a framework to present research methodologies as living entities that can establish meaning (Giorgi, 1992; Holloway & Todres, 2005; Sandelowski, 2010). One advantage of this approach is that it provides the ability to collect data and create a descriptive image of the phenomenon under study (Mouton & Marais, 1996). In the present study, a descriptive approach was appropriate because an accurate description of an inclusive work environment was required of the experiences of CDOs involved in engaging diverse employees. Further, according to Streubert, Speziale, and Carpenter (2003), descriptive research is central to unstructured or semi-structured research interview investigations.

Qualitative research is predicated on the exploration of a phenomenon, issue, or problem. According to Hancock, Ockleford, and Windridge (2007), key elements of qualitative research include:

1. A focus on how people or groups of people can have differing views of their social or psychological reality.
2. An account of complexity by incorporating the real world context.
3. A use of people's accounts as data.

4. A focus on reports of experience(s) that cannot be adequately expressed numerically.
5. A focus on description and interpretation, which might lead to development of new concepts or theory or to an evaluation of an organizational process.

Creswell (2012) posited that qualitative research starts with “assumptions and the use of interpretive/theoretical frameworks that inform the study of research problems addressing the meaning individuals or groups ascribe to a social or human problem” (p. 44). Specifically, Creswell (2007) defined qualitative research as beginning:

With the assumptions, a worldview, the possible use of a theoretical lens, and the study of research problems inquiring into the meaning individuals or groups ascribe to a social or human problem. To study this problem, qualitative researchers use an emerging qualitative approach to inquiry, the collection of data in a natural setting sensitive to the people and places under the study, and data analysis that is inductive and establishes patterns or themes. The final written report or presentation includes the voices of participants, the reflexivity of the researcher, and a complex description and interpretation of the problem, and it extends the literature or signals a call for action. (p. 37)

Inclusion, as related to engaging diverse employees in the workplace, is an emerging concept. This study explored the perceptions and lived experiences of CDOs in establishing and maintaining an inclusive work environment. Therefore, qualitative research methodology was aligned to the purpose of exploring the meaning assigned to this experience to identify best practices.

The qualitative approach relied upon semi-structured interviews conducted on a one-on-one basis with the survey participants. In using a one-on-one format, the investigator was able to glean deep understanding and insight regarding the practices of CDOs. These practices and insights could prove instructive.

Restatement of Research Questions

Sekaran (2003) defined research as “an organized, systematic, data based, objective, scientific inquiry or investigation into a specific question, undertaken with the purpose of finding answers or solutions to it” (p. 5). To discover how to overcome the challenges associated with failing to engage diverse employees, the first two research questions this study posed were: (a) What strategies and practices are employed by CDOs in global organizations to promote and facilitate inclusion of diverse employees? and (b) What challenges were faced by these CDOs in implementing strategies and practices employed to achieve inclusion of diverse employees? To ascertain the measurements associated with inclusion, this study asked: (c) How do CDOs measure success of their inclusive workplace practices? Finally, to glean forward looking insights into their practices, this study asked: (d) Based on their experiences, what recommendations would CDOs make for future implementation of inclusive workplace practices?

Framework. This research study was grounded in part by social inclusion theory, which correlates with principles of social justice. Social justice ideologies postulate that social inclusion is based in rights, equity of access, and fairness (Gidley, Hampson, Wheeler, & Bereded-Samuel, 2010). The concept of *social inclusion* was initially rooted in social and economic theories, and evolved into European government

policies (Dodd & Sandell, 2011). Politicians' use of the terminology subsequently found application and usage in other segments (Rawal, 2008; Silver, 1994; Tlili, 2008). In those broader segments of use, social inclusion is often defined by its antonym, *social exclusion* (Rawal, 2008). According to Rawal (2008), social exclusion is essentially marginalization, being denied the rights and privileges afforded to the socially included. Within the work environment, social inclusion has found application in the realm of workplace diversity and highlights the degree to which employees are able to participate fully in the organization. Conceptually, diversity focuses on the demographic composition of an organization. Inclusion focuses on barrier-free workplaces to allow for the participation and contribution of all employees within the organization (Roberson, 2004).

Methodology

This study employed a grounded theory methodology. Grounded theory is “discovered, developed and provisionally verified through systematic data collection and analysis of data pertaining to that phenomenon” (Strauss & Corbin, 1998, p. 23). Since grounded theory does not begin with initial assumptions, this methodology provided the opportunity to construct the data in partnership with the CDOs. Further, as noted previously, the descriptive approach aligns well with the interview format and analysis of content for theme identification.

The investigator considered other methodologies in the planning of this study. First, the case study method was selected. The case study method allows the researcher to develop an in-depth analysis of an event, activity, or process (Creswell, 2014). A case study is best suited when attempting to answer *how* and/or *why*

questions (Yin, 2003). While significant details may result, the case study approach is limited to a single event. Therefore, this method was determined to be impractical for this study.

In addition to considering the case study method, ethnography was also considered. Rooted in anthropology and sociological perspectives, ethnography studies patterns of behavior that are shared within an intact cultural group and observed by the researcher (Creswell, 2014). Like the case study method, ethnography proved not to be suited for this study.

Phenomenological research helps to understand the commonality of experiences shared by several people and provides an understanding of the phenomenon by describing how a better understanding may help individuals, organizations, or the society with the challenges they face (Leedy & Ormrod, 2013). According to Moustakas (1994), using a phenomenological design will encourage participants to conceptualize ideas, pulling from their lived experiences. Gray (2009) posited that phenomenological research, then:

- Emphasizes inductive logic.
- Seeks the opinions and subjective accounts and interpretations of participants.
- Relies on qualitative analysis of data.
- Is not so much concerned with generalizations to larger populations, but with contextual descriptions.

Therefore, a qualitative phenomenological investigation was deemed the best approach to understanding the lived experiences of CDOs in this study, as greater information is

needed to identify their best practices. Qualitative research attempts to explore how individuals perceive things and why things are the way they are (Gelo et al., 2009). The qualitative method provides for a broader base of knowledge for collecting and understanding common experiences with regard to a phenomenon (Creswell, 2013).

To appreciate the subjects' experiences, it was important to use the phenomenological approach, which requires those conducting the research to group their own experiences (Locke et al., 2004; Nieswiadomy, 1993). Bracketing the researcher's experiences is addressed in further detail in the subsequent Role of the Researcher section. Phenomenological research is based on the study of a limited number of participants and identifying patterns with meaning (Moustakas, 1994). To do so, Creswell (2003) advocated emerging data review with the primary intent of developing themes from the data. Interviews, which were conducted for this study, are the most frequently utilized data gathering methodology for phenomenological research (Locke et al., 2004). The interviews are described in detail in the Data Collection section.

Research Design

The research design is critical to collection and analysis (Wright & Craig, 2011). It has been said that research design is the bridge between research questions and the data, outlining how the data will be reviewed (Gray, 2009). Given the import of this critical bridge, the researcher was diligent and purposeful in the determining the approach associated with participant selection, data collection, and the protection of human subjects.

Participant selection and description. The study population consisted of a defined group of individuals all possessing similar characteristics relevant to the research (Sokolowski, 2008). The target population of this study consisted of 20 CDOs in global organizations. A CDO serves as the chief point person for diversity issues and fulfilling the role of a relational leader, coordinating initiatives and networks that include the entire organization structure (D. Williams & Wade-Golden, 2007a).

The Conference Board is a global independent business membership and research organization headquartered in New York City. It counts approximately 1,2000 public and private companies as members, which represent 60 countries. One component of the Conference Board membership is membership in councils: peer networks that provide benchmarking, industry insights, and confidential dialogue to help its members shape strategic decisions. The members of the Global Diversity & Inclusion Executive Council (GDIEC) include the most senior executives responsible for global diversity and inclusion in companies where at least 20% of revenues are earned outside of the United States. The principal investigator is a member of the companies. By virtue of that membership, access was provided to the membership directory of those within the GDIEC.

The membership directory was reviewed and CDOs from broad industries were invited to participate in the research. Therefore, a purposeful sampling strategy was used with maximum variation, in which a small number of units maximize the diversity relevant to the research. Patton (1990) posited that:

This strategy for purposeful sampling aims at capturing and describing the central themes or principal outcomes that cut across a great deal of participant or

program variation. For small samples a great deal of heterogeneity can be a problem because individual cases are so different from each other. The maximum variation sampling strategy turns that apparent weakness into a strength by applying the following logic: Any common patterns that emerge from great variation are of particular interest and value in capturing the core experiences and central, shared aspects or impacts of a program. (p. 53)

To that end and based on the GDIEC membership, invitations were sent to CDOs in consumer products, education, financial services, hospitality and travel, media and entertainment, professional services, public administration, and services and technology. Once the final list of GDIEC member participants was confirmed, the approved IRB recruitment script (See Appendix A) was used to solicit their participation.

Definition of analysis unit. The unit of analysis for this study was CDOs in global organizations. The purpose of this study was to explore and identify those practices and organizational behaviors associated with facilitating inclusion for diverse employees. The sample of 12 CDOs chosen for this study met the following criteria: (a) hold or have held the CDO position, equivalent to Director or above, (b) employed by a global organization, and (c) have been employed in the CDO post for at least a year in the same organization. The study participants represented broad experiences and were chosen for their ability to articulate the practices that they deployed to promote inclusion. Creswell (2013) recommended that researchers select participants who can “purposefully inform an understanding of the research problem and central phenomenon in the study” (p. 156).

The CDO participants were selected by purposive sampling. In purposive sampling, the researcher may choose to make decisions regarding the participants based on their unique knowledge to support their involvement (Jupp, 2006). For this reason, some refer to it as subjective sampling.

According to Dworkin (2012), data redundancy may be achieved with a participant number range between five and 30. Therefore, the total of 20 participants met this objective. Denzin and Lincoln (2011) agreed, noting that the lived experiences of five to 20 participants suffice to provide new knowledge on the subject studied. Each participant in the study had the potential to provide a variety of concepts, and large samples are not necessary in generating significant data (Sokolowski, 2008).

Sources of data. The most common sources of data collection in qualitative studies are interviews, observations, and document review (Creswell, 2009). The interview is the most common source of data (Creswell, 2014). Beyond the qualitative semi-structured interview process, additional sources of data enhanced the veracity of the study in addressing the organizational practices that yield full participation of diverse employees. One such source was the observation of the survey participant during the semi-structured interview. Specifically, body language was observed in order to assess if certain behaviors and practices elicited intense reactions.

Protection of human subjects. The protection of human subjects is the cornerstone of ethical research; this study adhered to those high standards. The nature of this study provided minimal; no social, economic, or legal risks were incurred as a result of participating in the study. The meticulous data collection process, which included anonymity of participants, supported the minimization of said risks. Further,

Pepperdine University requires that researchers have their research plans reviewed by the Institutional Review Board (IRB) to assess the potential for risk to the study participants.

Institutional Review Board. In accordance with the requirements set forth by Pepperdine University regarding research involving human participants, the requisite application and supportive materials were provided. As reported by Pepperdine University's IRB,

It is the policy of Pepperdine University that all research involving human participants must be conducted in accordance with accepted ethical, federal, and professional standards for research and that all such research must be approved by one of the university's Institutional Review Boards (IRBs). In the review and conduct of research, Pepperdine University is guided by the ethical principles set forth in the Belmont Report. In addition, all human subjects research conducted by or under the auspices of Pepperdine University must be performed in accordance with the U.S. Code of Federal Regulations, DHHS (CFR), Title 45 Part 46 (45 CFR46), entitled Protection of Human Research Subjects, and Parts 160 and 164, entitled Standards for Privacy of Individually Identifiable Health Information and the California Protection of Human Subjects in Medical Experimentation Act.

CDOs who voluntarily agreed to participate in this study were given informed consent forms to sign (See Appendix B). Informed consent forms ensure that the participants agree to the provisions of the study prior to their participation (Creswell, 2014). In most cases, informed consent forms include the following identifications:

(a) the name and identity of the researcher, (b) the sponsoring institution, (c) the purpose of study, (d) benefits of participating, (e) level and type of participant involvement, (f) noted risks to the participant, (g) guarantee of confidentiality, (h) assurance of ability to withdrawal at any time without penalty, and (i) names of persons to contact if questions or concerns arise (Creswell, 2014).

Study participants, who were voluntary and received no remuneration for participation, were invited to take part in the study. Each participant received a written invitation letter to participate, which not only included a comprehensive explanation of the research but also outlined the following:

1. A statement indicating that the study was being conducted in partial fulfillment of the requirements of a dissertation;
2. The purpose of the study;
3. A summary of the research methodology used in the study;
4. An estimate of the time required to participate;
5. Reiteration that the participant's identity and organization would be confidential and anonymous because specific identifiers would not be used;
6. An overview indicating how the interview would be conducted and how content would be stored and disposed of after the completion of the study;
7. A statement indicating that participation was voluntary, that participants could withdraw from any part of the interview process at any time, and that participants could choose not to answer all the questions; and
8. Notification that interview data would be retained for a period of 5 years after the acceptance date of the dissertation.

Data collection. Data collection for this study included a two-phased approach. First, a comprehensive review of literature was completed and is included in the preceding chapter. According to Boote and Beile (2005), a prerequisite of substantive research is the completion of a thorough literature review. Inasmuch, the literature review provided historical context, identified major issues, and refined the study focus (Grey, 2010). The literature review helped to identify the research problem worthy of research and informed the creation of the research questions. Secondly, since semi-structured interviews allow for probing of views and opinions, this type of question was employed for this study. This study used semi-structured interviews to understand the lived experiences of CDOs with regard to the best practices associated with promoting an inclusive work environment for diverse employees. As participants in semi-structured interviews are encouraged to expand on their answers, this aligned well with the phenomenological approach where the objective was to explore subjective meanings that participants assign to concepts, events, and experiences (Gray, 2013).

Interview process. The interview process for this study was initiated by contacting participants who met the aforementioned participant description criteria. The participants were contacted by either email and by phone. Once it was determined and confirmed that they consented to be included in the study, the Participant Informed Consent form (See Appendix B) was sent. Upon receipt of the executed Informed Consent form, the form was filed and the participant was re-contacted to coordinate the interview logistics. Interviews were scheduled for 60 minutes at a location of convenience for the participant. If it was not feasible for to conduct the interview in person, the interviews were conducted by telephone. The complete list of interview

questions was provided to each participant in advance of their scheduled interview. At the onset of the interview, permission was requested to audio record the interview. If permission was granted or not, thorough handwritten notes were taken.

At the conclusion of the interview, an additional 90 minutes were set aside to reflect. During the reflection period, the researcher sat in a quiet place to listen to the digital recording and reflectively journal about the interview experience (Creswell, 2003; Gray, 2010; Seidman, 2006). According to Herda (1999), the personal journal represents the heart of the data collection process as it allows the researcher the cathartic opportunity to log fears, questions, ideas, observations, and comments.

The researcher opted to personally transcribe the data from the interviews. This process, while time consuming, provided the ability to capture nuances that would likely be missed if the transcription were completed by a third party. An additional 3 hours was allowed to complete each transcription. According to Seidman (2006), it is normal for there to be a multiple of three from the length of the interview to the time required for transcribing. Once the interview was transcribed and corrected, it was then emailed to the participant for his/her review.

Interview protocol. An interview protocol provides a procedural guide for conducting qualitative research. The Interview Protocol, which outlines the procedures undertaken, was reviewed by the preliminary review committee and approved and finalized by the dissertation committee. To ensure consistency, the Interview Protocol was taken to each interview and followed. Since the protocol was designed for a specific one-time use, traditional methods of establishing reliability of a data collection instrument were not applicable.

According to Gray (2010), interviewing is a skill that requires practice and preparation. The researcher prepared in advance of the interview. To that end, best practices associated with research interview techniques, including active listening, impression management, use of language, use of silence, maintaining control of the interview, and improvising as appropriate were reviewed (Evans, 2009; Fraizer, 2009; Gray, 2010; Miramontes, 2008). Active listening was critical as it helped to deepen the interviewer's understanding of the participants' experiences by creating empathy and facilitating engagement. Guillaume (2000) argued that phrasing and the intention of the researcher's prompts establish the kind of reflection, insights, and connections that yield success in active listening. The strategies deployed were outlined by Louw, Todd, and Jimakron (n.d.) to further active listening (See Table 1). The purpose of the active listening was to probe, evaluate, and capture the essence of the participant's responses to insure that they were captured in the study.

Table 1

Active Listening Strategies

Questions/Statements	Objective
"How do you typically...?"	Probing using open-ended questions extended the participant's response and created further opportunities for exploration
"Why do you think...?"	Evaluating the meaning behind a response and encourage the participant to visit from a new direction
"It sounds like...."	Allows for paraphrasing and the opportunity for the researcher to validate understanding of the participant's stated experience
"I'm not sure that I understand..."	Encourages the participant to add, explain or clarify

For each in-person interview, the researcher arrived at the agreed upon location 60 minutes in advance of the scheduled interview to set up the recorder, organize the questions, and prepare to conduct the interview. The recorder was tested prior to

conducting an interview. For each interview, an ample supply of pens and pencils, a journal, and two digital recording devices with extra power cords were available.

As described in the Interview Protocol, the process included: (a) expressing gratitude for the participant's willingness to participate; (b) reviewing the Informed Consent form; (c) an explanation of the interview process, request to audio record and notification of note taking; (d) confirmation of confidentiality; (e) inquiring if the participant had questions or concerns; (f) starting with an ice breaker to build rapport and open the interview (Moustakas, 1994); and (g) posing each of the interview questions. To close the interview, the researcher: (a) inquired if the participant had anything additional to include, (b) reiterated confidentiality, (c) advised that the written transcript would be provided, (d) expressed gratitude for his/her time and participation, and (e) provided a business card. This protocol was followed for each interview and each participant received a formal handwritten thank you note within a week of his or her completed interview.

Instrumentation. Each participant was asked 11 questions. Specifically, interview question number one is a *meaning question*. Creswell (2009) defined meaning questions as questions that solicit information that leads to an understanding of the phenomenon. This question did not link to any research question but provided additional substantive information about the participants' experiences. The meaning question posed was, "I thought we would start by having you tell me a little about yourself...what prompted you to become involved in diversity and inclusion." The intent of the meaning question was to ease the transition into the other interview questions while providing an understanding of the phenomenon. From there, the following 15-

question interview protocol was used for data collection. The researcher designed the original set of questions on the interview protocol. Purposeful attention was given to the design of the protocol questions to ensure that they would be collectively comprehensive and mutually exclusive. The interview questions included:

1. How do you define “inclusion”?
2. What are your best practices for promoting and facilitating inclusion of diverse employees?
3. What practices do you think hinder “inclusion”?
4. What resources did you need to recruit and retain diverse employees?
(Assuming creating an inclusive work environment starts with talent acquisition)
5. What were the major challenges and/or obstacles in creating an inclusive work environment?
6. How did you deal with and/or overcome those challenges?
7. How would you personally describe the elements of a successfully inclusive work environment?
8. How could these elements be measured and tracked to ensure a successfully inclusive work environment?
9. What measures does your leadership value in assessing the success of your inclusive practices?
10. What cautionary tale(s) would you share with executive leaders in the implementation of inclusive workplace practices?

11. Is there anything else that you would like to share about implementing inclusive workplace practices that you think would be relevant to this study? Digitally recording each interview and capturing interview content via handwritten notes collected the data. Both were transcribed into a paper copy in a MS word file.

Validity and reliability. The principles of validity and reliability ensure that the research protocol instrument addressed the research questions (Gray, 2010). The methodology and contextual framework of this study also helped to establish validity. Internal and external validation and reliability are critical elements of credible research (Creswell, 2007). Meltzoff (1998) asserted that external validity is “the demonstrated validity of the generalizations that the researcher intended at the outset and the validity of the generalized inferences that the researcher offers at the end” (p. 46). Flick (2002) supported the notion of reliability by positing that documenting the research process serves to increase the study’s reliability. Lincoln and Guba (1985) postulated that reliability is determined by the dependability and consistency of the findings related to the collected data. Further, “auditability is achieved when the researcher leaves a clear decision trail concerning the study from its beginning to end” (Sandelowski, 1986, p. 34). To that end, a three-step process of validity was employed.

Step 1: *Prima facie* validity. Throughout history, this Latin term has referred to a surface or cursory initial impression. In this initial phase, what were thought to be appropriate interview questions were designed based on the literature review and were reflected in Table 2. Essentially, *prima facie* in this regard connotes *upon the initial observation* (Herlitz, 1994).

Step 2: Peer review validity. Peer review validity was achieved by the review and input of a panel of doctoral students at Pepperdine University's Graduate School of Education and Psychology. The panel consisted of accomplished business and civic leaders who have completed graduate level coursework in Organizational Leadership. Based on their feedback, questions were refined to achieve greater clarity and bias reduction. Once modifications were completed, the interview and research questions were submitted to the dissertation committee, composed of three faculty members, leading to the final step in the validity process.

Step 3: Expert review validity. This final step of validity was accomplished by faculty review and comment upon the recommendations provided via the peer review. Where directed by the expert panel, interview questions were again modified. The questions include in Table 2 represent those that were approved by the expert panel.

Table 2

Research Questions and Corresponding Interview Questions

Research Questions	Corresponding Interview Questions
RQ1: What strategies and practices are employed by CDOs in global organizations to promote and facilitate inclusion of diverse employees?	<ol style="list-style-type: none"> 1. How do you define "inclusion"? 2. What are your best practices for promoting and facilitating inclusion of diverse employees? 3. What practices do you think hinder "inclusion"? 4. What resources did you need to recruit and retain diverse employees? (Assuming creating an inclusive work environment starts with talent acquisition)

(continued)

Research Questions	Corresponding Interview Questions
RQ 2: What challenges are faced by these CDOs in implementing strategies and practices employed to achieve inclusion of diverse employees?	<p>5. What were the major challenges and/or obstacles in creating inclusive work environment?</p> <p>6. How did you deal with and/or overcome those challenges?</p> <p>7. What is the role of inclusion in your talent acquisition strategy?</p> <p>8. Do you think that the characteristics of an inclusive work environment will change in the future?</p>
RQ 3: How do CDOs measure success of their inclusive workplace practices?	<p>9. How would you personally describe the elements of a successfully inclusive work environment?</p> <p>10. How could these elements be measured and tracked to ensure a successfully inclusive work environment?</p> <p>11. What measures does your leadership value in assessing the success of your inclusive practices?</p> <p>12. What methods did you employ to benchmark and track inclusive workplace practices?</p> <p>13. In what other way(s) is inclusion defined and measured differently at your organization?</p>
RQ 4: Based on their experiences, what recommendations would CDOs make for future implementation of inclusive workplace practices?	<p>14. What cautionary tale(s) would you share with executive leaders in the implementation of inclusive workplace practices?</p> <p>15. Is there anything else that you would like to share about implementing inclusive workplace practices that you think would be relevant to this study?</p>

Statement of Personal Bias

As noted previously, qualitative research is utilized as a way to discover the lived experiences of the participant. Although semi-structured interviews provide practical opportunities to glean insights from the informant, they are not necessarily objective (Tufford & Newman, 2010). As the researcher serves as the primary instrument for this qualitative research project, Tufford and Newman (2010) asserted that this “subjective endeavor entails the inevitable transmission of assumptions, values, interests, emotions

and theories, within and across the research project. These preconceptions may influence how data are gathered, interpreted, and presented” (p. 81).

It is important for researchers to try to transcend some of their own biases and confront their own opinions and prejudices regarding the data (Rajendran, 2001). Given that multiple tasks were performed associated with the completion of this study, the investigator’s biases were inherent in every stage. Researchers should identify their “biases, values and personal interest about their research topic and process” (Creswell, 2003, p. 184). To that end, the researcher is an African-American woman with professional experience in Human Resources and Diversity and Inclusion.

Bracketing is an often-used method to mitigate the inclusion of bias in the research. Wall, Glenn, Mitchinson, and Poole (2004) described bracketing as a researcher’s endeavor to attain impartiality by vacating foreknowledge. Gearing (2004) defined bracketing as a “scientific process in which a researcher suspends or holds in abeyance his or her presuppositions, biases, assumptions, theories, or previous experiences to see and describe the phenomenon” (p. 1,430). To further illuminate the import, Starks and Trinidad (2007) declared that the investigator

must be honest and vigilant about her own perspective, pre-existing thoughts and beliefs, and developing hypotheses...engage in the self-reflective process of “bracketing”, whereby they recognize and set aside (but do not abandon) their a priori knowledge and assumptions, with the analytic goal of attending to the participants’ accounts with an open mind. (p. 1,376)

Researchers must identify their biases early in the study and then set those biases aside while the research study is underway (Creswell & Miller, 2000).

In this study, reflective journaling was used as a method of bracketing; the researcher's observations, assumptions, and outstanding queries were captured using this method. Cutcliffe (2003) suggested writing notes during the data collection and analysis processes as a means to reflect upon the engagement with the data; this process can serve as a method of bracketing. Hanson (1994) also supported this technique by noting that maintaining a reflective journal may facilitate increased awareness of biases via sustained reflection throughout the research process.

Data Analysis

Overview. Once the data were collected and transcribed, the analysis phase was initiated. The process of qualitative data analysis is described by some as much *art* as *science* because the interpretation involves both creative artistry and technical preciseness (Miller & Crabtree, 1999). "Qualitative data analysis is...an inductive process of organizing data into categories and identifying patterns...among the categories" (McMillan & Schumacher, 2006, p. 364). Creswell (2003) posited, "data analysis —involves preparing the data for analysis, conducting different analyses, moving deeper and deeper into understanding the data, representing the data, and making an interpretation of larger meaning of the data" (p. 190). A rigorous and systematic set of procedures was followed to produce a legitimate and sound theory. The inductive coding process ensures that patterns and/or themes emerge from the transcribed content.

Coding. To facilitate the emergence of patterns and categories, the principles suggested by Gray (2003) were followed:

1. Organize and transcribe the data, focuses on the developing an organizational framework to catalog the notes, tapes, documents, etc.,
2. Collect, code, collect addresses the repetitive process, recognizing that early coding iterations can assist in creating familiarity with the data,
3. Familiarization provides the opportunity to orient oneself with the breadth of data gathered during the research study,
4. Focused reading initiates the process of categorizing by underlining words and phrases.
5. Review/amend and refine codes during the second reading.
6. Generate theory provides the opportunity to connect the dots that emerged from the data in order to draft theoretical principles or models.

Given that the veracity of the study results can be affected by the data analysis, throughout the literature, authors suggest using an independent coder. Therefore, in this study, interrater reliability was established using a co-reviewer process. To improve the study's reliability and validity, Vargo et al. (2003) suggested that that the principal researcher and the secondary researcher possess sufficient knowledge about the phenomenon that is being studied. The data were coded individually and a table of constructs was produced. These constructs or themes resulted from the analysis of content. Within the table, each of these themes identified those key words and phrases, which were used to glean the constructs.

As a next step, a panel of co-reviewers individually assessed the coding. The co-reviewers and the researcher then discussed the themes and keywords to determine modifications. The investigator then reviewed the co-reviewers' recommendations with

one of the members of the dissertation committee before finalizing the coding process. The major constructs/themes that were gleaned, as well as their descriptions and a sampling of participant quotes, will be provided in Chapter 4.

Inter-rater Reliability and Validity

Reliability is the degree to which a tool produces consistent results. Inter-rater reliability is a measure of reliability used to assess the degree to which different raters are in agreement regarding their assessments. Since observers may not construe the data in the same manner, the raters may not be aligned as to how specific responses connote knowledge or familiarity with the skills being evaluated (Cozby, 2001). Validity, in contrast, denotes how well a test measures what it is purported to measure.

To ensure inter-rater reliability and validity, the principal investigator used a three-step process. The first step of the process involved coding the data independently. From this initial coding process based on content analysis, major themes were identified and the results noted. The second step required the engagement of two peer reviewers. The goal of this step was to achieve consensus regarding the coding results from the initial step. The third and final step was activated when the peer review did not result in consensus and required the engagement and review of the dissertation committee. The goal of this step was resolution regarding the coding themes and strategies.

Summary

The objective of Chapter 3 was to present the elements associated with the qualitative research design deployed for this study. To provide context, an overview of the study was provided, including the research questions. The phenomenological

approach for the research methodology, which incorporated interviews and content analysis, was explored and provided the foundational elements of the research design and interview protocol. The chapter concluded with a comprehensive examination of the steps associated with the data analysis, which segue into the research findings provided in Chapter 4.

Chapter 4: Findings

Workplace diversity in the United States is rooted in the Civil Rights movement of the 1960s. The efforts to increase diversity have evolved from a focus on compliance to a focus on inclusion. The latter is predicated on creating a work experience in which diverse employees perceive belonging, respect, and acknowledgement of their uniqueness. The increase in demographic diversity in the U.S. should signal to organizations to not only value diversity but also consider it as talent or human capital that can facilitate competitive advantage. Should they opt to do so, the outcomes of organizational diversity initiatives include improved competitiveness (Oyler & Pryor, 2009). Essential to this would be a transformed culture and a differentiated employee experience that indicates that inclusion is central to the organization and diversity is “unequivocally, unconditionally valued” (Richard & Johnson, 2001, p. 179).

The aim of this qualitative study was to explore the best practices and related measures of CDOs associated with creating inclusive environments. To accomplish this, four research questions were asked

1. What strategies and practices are employed by CDOs in global organizations to promote and facilitate inclusion of diverse employees?
2. What challenges are faced by these CDOs in implementing strategies and practices employed to achieve inclusion of diverse employees?
3. How do CDOs measure the success of their inclusive workplace practices?
4. Based on their experiences, what cautionary tales would CDOs share for future implementation of inclusive workplace practices?

In support of these research questions, 11 interview questions were developed and posed to the participants. Open-ended interview questions are the most popular data gathering technique used in qualitative research studies (D. Turner, 2010). The interview questions in this study were designed to be open-ended, allowing for probing and providing the participant the opportunity to express the information that he or she found important (Berg, 2007). The interview questions were explicitly intended to give voice to the CDOs' views and experiences (Herman & Bently, 1993). The interview questions were:

1. How do you define "inclusion"?
2. What are your best practices for promoting and facilitating inclusion of diverse employees?
3. What practices do you think hinder "inclusion"?
4. What resources did you need to recruit and retain diverse employees?
(Assuming creating an inclusive work environment starts with talent acquisition)
5. What were the major challenges and/or obstacles in creating an inclusive work environment?
6. How did you deal with and/or overcome those challenges?
7. How would you personally describe the elements of a successfully inclusive work environment?
8. How could these elements be measured and tracked to ensure a successfully inclusive work environment?

9. What measures does your leadership value in assessing the success of your inclusive practices?
10. What cautionary tale(s) would you share with executive leaders in the implementation of inclusive workplace practices?
11. Is there anything else that you would like to share about implementing inclusive workplace practices that you think would be relevant to this study?

This chapter presents the findings of the study through the analysis of the CDOs' responses to the semi-structured interview questions coupled with their directly quoted insights.

Profile of the Participants

Fourteen participants were interviewed for this study. The participants hold or have held the position of CDO, or an equivalent position in global organizations headquartered in the United States. The gender profile of the 14 research participants was 57% men and 43% women. The gender profile is represented in Figure 2. The distribution of industries represented and the titles held are depicted in Table 3. The titles of the CDO participants are reflected in Figure 3.

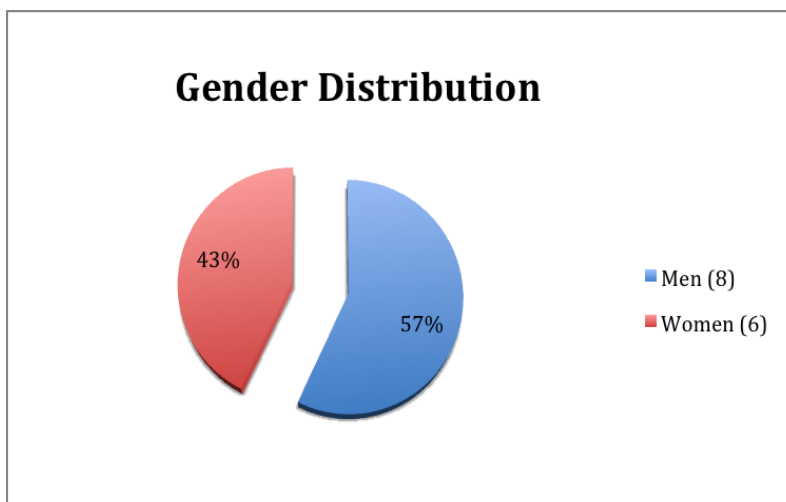


Figure 2. Gender distribution of research participants.

Table 3

Participant Demographics by Industry and Title

Industry (Alphabetical order)	Number of Participants
Consumer Products	5
Consumer Services	1
Entertainment	3
Financial Services	2
Tech	3

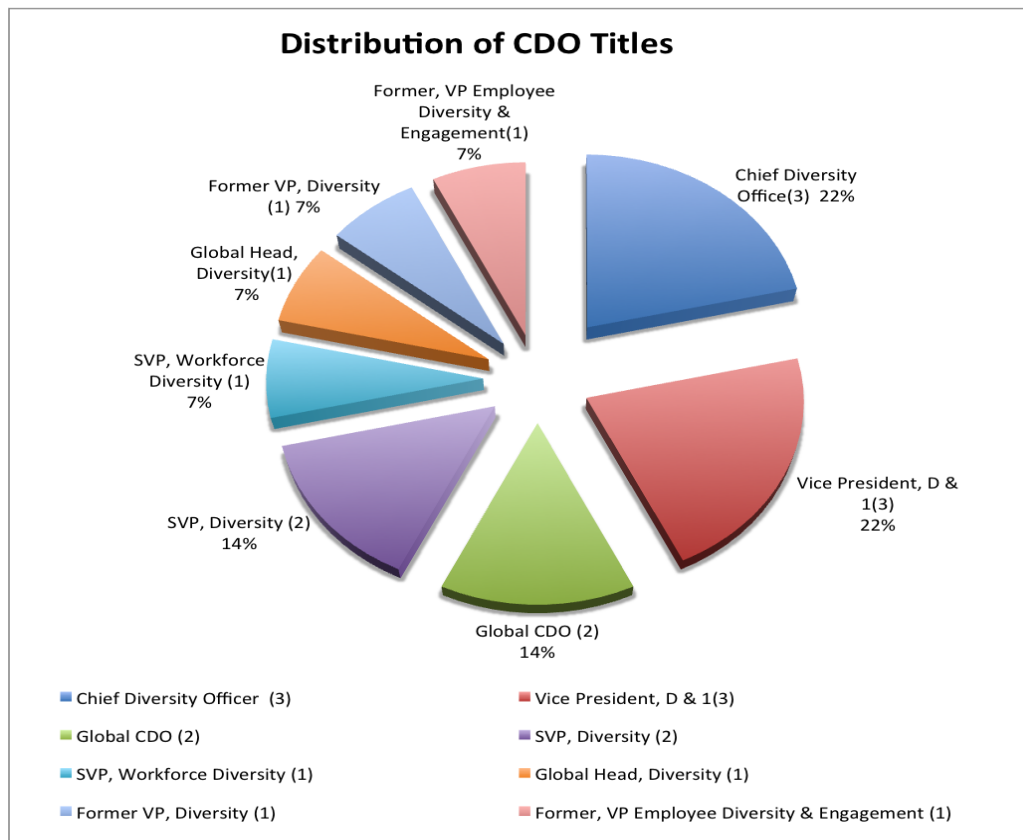


Figure 3. Distribution of CDO titles.

Data Collection

The second phase of data gathering for this study involved asking a set of semi-structured interview questions, which were confirmed subsequent to the review and validated by the panel experts and the committee. Initially, it was planned to source participants from the membership of the GDIEC. The researcher had concerns

regarding the appearance of solicitation from a group of which she is a member and which could be incongruent with the spirit of the GDIEC. Consequently, the strategy for sourcing participants was modified slightly. The names of potential participants were derived from the three sources: (a) the researcher's professional network, (b) peer referrals by participants, and (c) referrals from the researcher's professional network.

The preliminary process to screen participants included confirming that participants were from one of the aforementioned sources, providing them with the recruitment flyer, conducting an initial call to answer questions, and determining if the prospective participant met the required criteria. CDOs who voluntarily agreed to participate were then given informed consent forms. A mutually convenient time to conduct the interview was scheduled. At the onset of the interview, informed consent was again reviewed and permission to record was granted. In all cases, permission to record was given. The semi-structured interviews began with the exchange of pleasantries and the posing of an icebreaker or meaning type question. Icebreaker questions are designed to develop rapport and engage participants in a conversation about the key aspects of their lives, careers, etc. According to the works of Douglass (1985) and DiCicco-Bloom and Crabtree (2006), rapport is a foundational element of the interview and serves as the means of establishing a trusting environment as well as a trust-based relationship with the respondent. The icebreaker questions included *can you please tell me about your career, what prompted you to become involved in diversity and inclusion, is this the work that you thought that you would be doing, and why is diversity and inclusion work important to you?* "Once trust has been established

through your icebreaker questions, it is time to focus your questions more directly on the research topic” (Brennen, 2013, p. 33).

The semi-structured interview format was chosen because it typically affords the flexibility to approach respondents differently while still covering the key data areas (Noor, 2008). As the data collection began, based on the responses from the participants, it was clear that interview questions #10 and #13 were redundant. Therefore, they were not posed to participants #4 through #14. As is a benefit of the semi-structured interview framework, each participant was asked the same set of questions, though there was not a defined ordering. The nature of this interviewing format served this research well. It provided respondents the opportunity to share their accounts of their experiences via open-ended questions (Dearnley, 2005). From this wealth of data, common and best practices started to emerge in the post interview process.

The post interview process included several critical steps relevant to data collection. At the completion of each interview, an additional 60-90 minutes were taken to review and refine notes and reflect on the interview. Boud, Keogh, and Walker (1985) described reflection as “an important human activity, which enables people to recapture their experience, think about it, and evaluate it” (p. 19). The audio recordings were also checked to confirm that the entire interview had been recorded. Once the interviews were transcribed, the audio was destroyed. Consideration was given to the importance of anonymity; therefore, personal and organizational identifiers were removed from the transcriptions.

Data Analysis

“Data analysis is the systematic search for meaning” (Hatch, 2002, p. 148). The analysis of qualitative research involves the process of uncovering and understanding of what the data describe. According to NSF (1997), qualitative data analysis is a highly fluid process that evolves as the patterns and themes emerge. Data reduction is an inductive process for creating meaning through the development of summary themes and categories (Thomas, 2006). Figure 4, adapted from Creswell (2009), presents the qualitative data analysis process

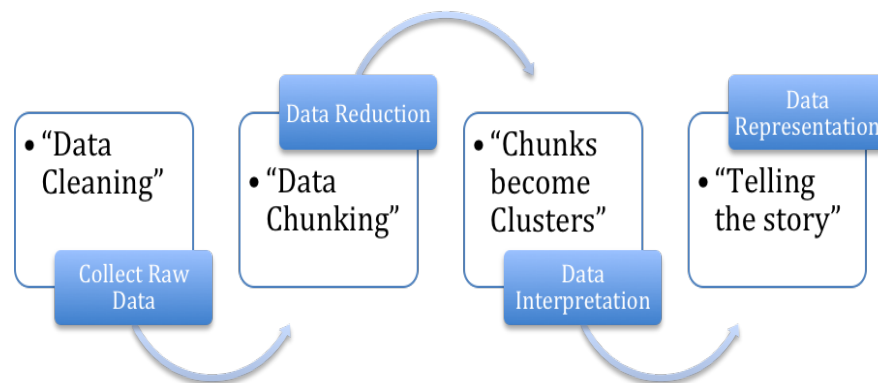


Figure 4. Qualitative data analysis process.

Data cleaning is the process of preparing and organizing the data into meaningful units of analysis. Data reduction is the researcher’s first and repeated pass at immersing himself/herself in the data to facilitate classification and categorization, a practice that leads to winnowing. Prior to and during the transcription, the interview notes and audio recorded interviews were reviewed several times to ensure depth of familiarity and immersion. The third step in the process occurred once the coded and chunked data became clustered with similar categories. As similar themes emerged, a color-coded MS Excel spreadsheet was used to capture them. In addition to the color-coding, the frequency of the responses was also noted. The final step involved the

themes facilitating the development of the story or narrative associated with the research. To ease understanding of the responses to the interview questions, the data were presented graphically to summarize the findings. The steps were employed:

1. Preparing of the raw data.
2. Close reading and rereading of the verbatim transcripts to insure familiarity.
3. Allowing themes to emerge from the data.
4. Identifying themes, concepts, and constructs that became clustered.
5. Noting overlapping and uncoded text.
6. Refining categories to include a search for contradictory points and insights.
7. Selecting appropriate direct quotes that underscored the essence of the theme.
8. Assimilating themes to tell the story of the lived experiences of the CDO participants.

The qualitative study sought to find meaning in the experiences of CDOs. Through data analysis, the researcher saw patterns, identified themes, and made interpretations. Through this process, the purpose was to share this meaning to help others who are creating an inclusive workplace or who intend to do so.

Establishing Interrater Reliability

The researcher independently coded the transcript data to discern common themes from the interviews. This provided a preliminary coding structure. Two colleagues then reviewed this initial structure. The initial review consisted of the researcher sharing the coding findings and discussing to the consensus. If consensus were not found, a committee member would review and provide the tiebreaker. Once

the decisions were made in this preliminary round, the researcher continued to code in a second cycle. At the completion of the second cycle of coding, the researcher and colleagues met again to conduct a final review. Following the same process as in the initial coding cycle, the group sought consensus. Again, if consensus were not found the committee would again be engaged to provide a second tiebreaker.

Data Display

At the completion of the data collection and analysis processes, several themes emerged including the importance of culture, measurement and leadership accountability. Other themes, which may be instructive also emerged yet, were less prominent. The data was organized by research question and is presented below.

Research Question One

The first research question posited was, what strategies and practices are employed by CDOs in global organizations to promote and facilitate inclusion of diverse employees? The four interview questions that collectively addressed Research Question One were:

1. How do you define “inclusion?”
2. What are your best practices for promoting and facilitating inclusion of diverse employees?
3. What practices do you think hinder inclusion?
4. What resources do and did you need to recruit and retain diverse employees (assuming creating an inclusive work environment starts with talent acquisition)?

Interview question one: Defining inclusion. The first interview question asked was, How do you define “inclusion?” The purpose of this question was to provide insight into the respondent’s perspective of inclusion and context for their subsequent responses. The predominant responses addressed participation. As depicted in Figure 5, the four key themes were (a) participation and membership, (b) embracing of difference/diversity, (c) consideration and recognition, and (d) respect.

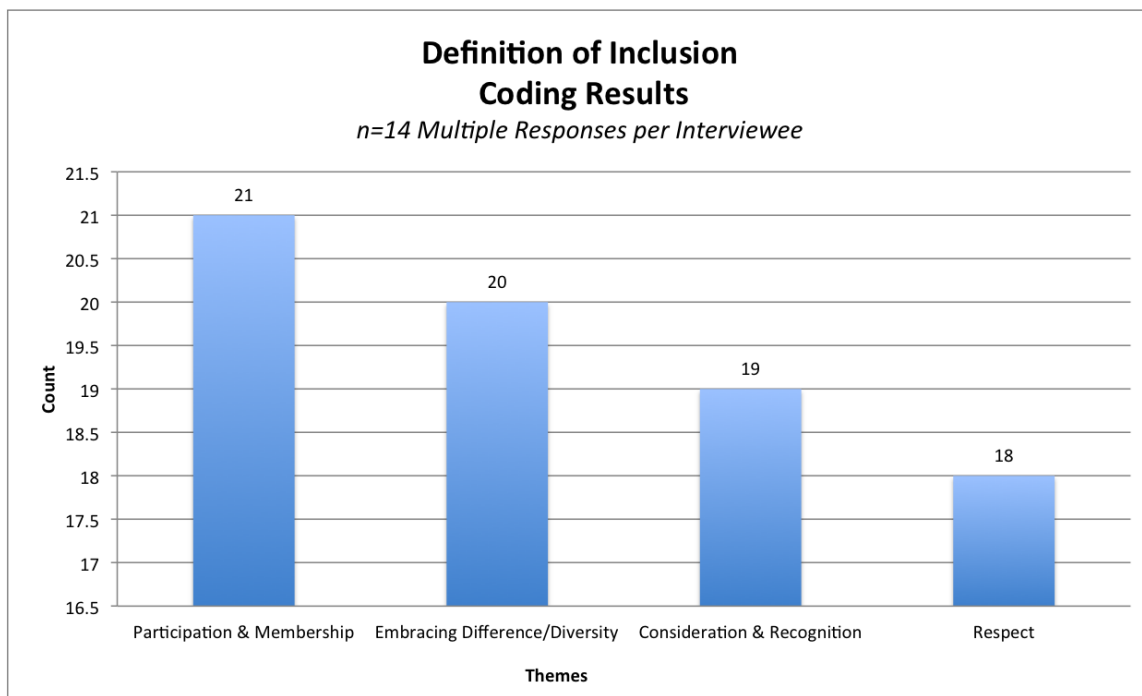


Figure 5. The definition of inclusion: Coding results.

Participation and membership. There were 78 elements identified in the definition of inclusion. Of the 78 referenced in total, 21 (26%) were in this category. The statements offered by Participants #3, #12 and #14 illustrated the importance of participation and membership as a key element of the definition of inclusion. There is no inclusion without being “in,” asserted Participant #3 (personal communication, February, 18, 2016). To echo that point, Participant #12 elaborated, “The whole intent of inclusion is to provide equity of access, participation and membership; that no one is excluded

and left out. Inclusion, in its most pure sense, insures full participation” (personal communication, March 15, 2016).

Finally, Participant #14 likened his definition of inclusion to having an all access pass. “Inclusion is not having to be triple screened, delayed or denied at the velvet rope of entry. It’s being welcomed in liked a revered guest” (personal communication, March 18, 2016). According to Mor Barak and Cherin (1998), inclusion encompasses three attributes: access, involvement, and influence. Access involves the degree to which a particular person can access information. Involvement addresses the degree to which an employee is involved in the team environment. Influence specifically points to the degree to which a person is empowered to impact the decision-making processes. Inclusion represents complete and effective contribution.

Embracing difference. Embracing difference and diversity was the second most reported element; 20 (25%) responses were included in this category. Participant #1 summarized the importance of this theme by stating, “I think inclusion is the next step once you have diversity. If diversity is the engine then, inclusion is the destination. You cannot get to your destination without an engine. Inclusion maximizes diversity” (personal communication, February 18, 2016). Inclusion as a workplace strategy attempts to embrace and maximize employee differences to advantage the company (Jayne & Dipboye, 2004).

Consideration and recognition. Consideration and recognition had 19 (24%) responses in this category. In exploring this response with respondents, a subtheme of covering was often cited with this element. Covering is a concept that NYU Law Professor Kenji Yoshino borrowed from 20th century sociologist Erving Goffman. In

Goffman's (1963) book, *Stigma*, he coined the term to describe the behavior that attempts to modulate our true identities. Yoshino's (2002) paper titled, "Uncovering Talent: A New Model of Inclusion," argues that in many cases inclusion is predicated on the employee's surrender of his/her elements of diversity. For the respondents articulating covering as a subtheme, consideration and being recognized for one's true self with one's true identity was cited as being at odds with covering.

I define inclusion as being considered, thought of and being recognized based on my true authentic self – which embodies all of my and your diversities, Covering, which is sadly prevalent in corporate America, essentially asks me to turn all of that down to be considered as a member. (Participant #9, personal communication, March 1, 2016)

Participant #14 described it this way; "Diversity is being thought of and being invited to the party, whereas, inclusion is being asked to dance" (personal communication, March 18, 2016).

Respect. Respect had 18 (23%) mentions this category. "Respect and dignity enable inclusion. If there's no respect and dignity, there won't be any inclusion" (Participant #10, personal communication, March 15, 2016). A cursory review of diversity statements of public companies would support the prevalence of respect.

In these statements, respect is included prominently (Jayne & Dipboye, 2004). McDonald's (as cited in Jayne & Dipboye, 2004) stated, "Respecting, listening to and participating in knowledge-sharing and eclectic insights have helped make us the organization we are today" (p. 411). Fannie Mae (as cited in Jayne & Dipboye, 2004) noted:

Our goal is to support an inclusive culture that enables all employees to be fully engaged and feel respected and valued for who they are, enabling them to do their best work and achieve the company's vision to be America's most valued housing partner. (p. 411)

In taking a stand for equality, PepsiCo (as cited in Jayne & Dipboye, 2004) reported, "As a global company, we work in countries with a broad array of laws and regulations. But regardless of where we operate, we take care to respect the diversity, talents and abilities of all" (p. 411). Note that the inclusion of this sample of statements does not connote that the participants in this research represented these organizations.

Interview question one: Summary. The data revealed common themes regarding the key components of the definition of inclusion. Those elements included participation and membership, embracing difference, consideration and respect. Taken together, these elements highlight the importance of having a sense of valued belonging and being respected in defining inclusion.

Interview question two: Best practices. The second interview question inquired, what are your best practices for promoting and facilitating inclusion of diverse employees? The purpose of this inquiry was to allow the respondent to share those experiences that they deemed to be effective. The respondents thereby believed in the efficacy of these practices. During the coding process, the following three themes were gleaned (See Figure 6):

1. Cultural actions
2. Program oriented
3. Leadership accountability

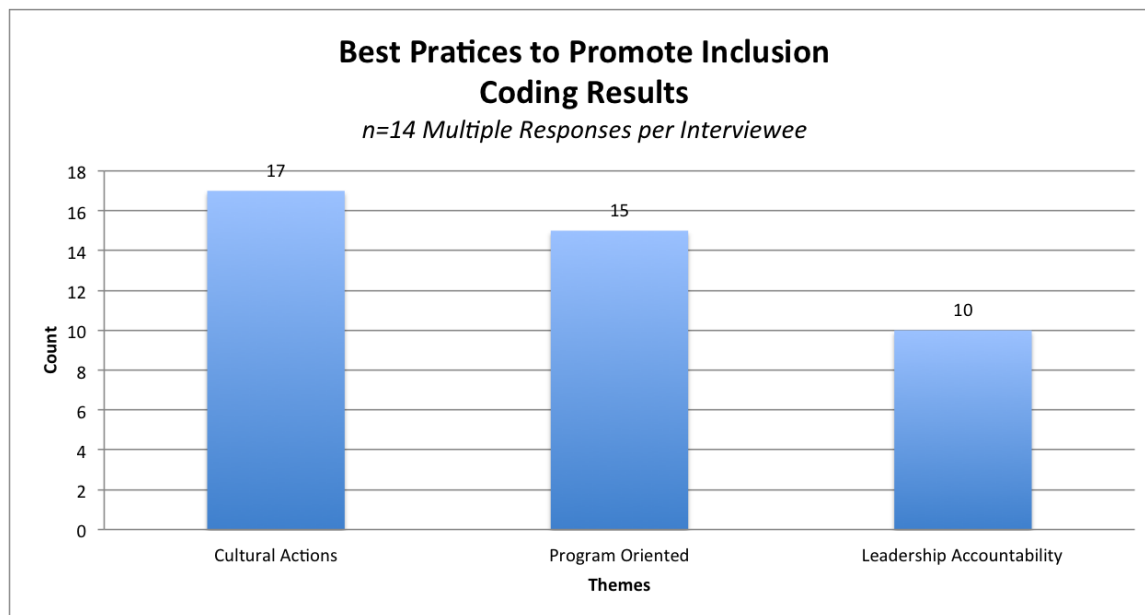


Figure 6. The best practices to promote inclusion.

Cultural actions. According to Ely and Thomas (2001), contextual factors within organizations can affect reaction to those who are different. Organizational culture is one of those factors. Shared values and beliefs amongst the employees comprise the organizational culture (Schein, 1985). For this research, respondents noted that cultural actions highlighted the necessity to embed inclusion into the organizational DNA. Of the 45 best practices cited, 17 (37%) were attributed to this category.

Essentially, the most important best practice is for our diverse employees to have more magic moments than tragic moments. Meaning, that there are more opportunities afforded by the culture, which they experience inclusion and feel embraced than there are that they feel excluded, rejected and disrespected.

(Participant #13, personal communication, March 17, 2016)

Some of the cultural actions associated with best practices were rooting out systemic barriers to inclusion and viewing/treating difference as strength. In conjunction, setting rules of engagement, which included quick response to intolerance and exclusion, was

also noted. “Far too often, leaders claim that inclusion is important to them, yet slow or no response to wrong-doings connotes intolerance thwarts those claims” (Participant #9, personal communication, March 1, 2016).

Program oriented practices. Program oriented practices emerged as the second grouping of best practices with 15 (30%) responses. These responses underscored the necessity of creating and sustaining a learning rich culture. According to Wheeler (1999),

Organizations that truly value inclusion are characterized by effective management of people who are different, ability to admit weakness and mistakes, heterogeneity at all levels, empowerment of people, recognition and utilization of people’s skills and abilities, an environment that fosters learning and exchanging of ideas, and flexibility. (pp. 33–34)

Participant #5 commented, “The blueprint for workplace inclusion has learning and development to enhance awareness as its stable foundation.” To that point, Participant #4 similarly offered,

We saw the greatest progress when we implemented a required learning curriculum targeted by level and leadership scope. Our learning extends personal awareness, inspires behavior change and presents a compelling ROI of inclusion. Without question, it proved to be the secret sauce for us, especially our senior execs. (personal communication, February 18, 2016)

Nadler and Tushman (1990) described the senior team as a learning system with an open system approach. The open system uses a consistent stream of learning, exposing them to new ideas, situations, and opportunities. Participant #8 agreed that

learning was important, but expanded her response to also reflect broader elements of the talent management process,

Learning unlocks awareness, but unless and until we accept and activate inclusion throughout all of our people programs, we're just whistling Dixie. As well, unless and until we engage and fully activate our leaders and hold them accountable, we may as well throw in the towel. (personal communication, February 26, 2016)

Leadership accountability. A burgeoning body of research speaks to executive leadership as a vital aspect of large-scale organizational change. Leadership accountability, while representing the third most cited best practice, was accompanied by passionate discussion. Ten attributes, representing 22% of the total responses related to leadership accountability, were in this category. The key attributes that connote leadership accountability are as follows:

- To whom the CDO reports
- Availability of resources
- Accountability included in performance management
- Component of total rewards
- Component of career mobility

A 2015 study by i4CP (Davis, 2015) suggested that high performance organizations are up to 4.5 times more likely to hold executives accountable for diversity and inclusion.

Participant #1 echoed the themes of the i4CP study:

All leaders should be held accountable for diversity & inclusion. But, there are 3 key executive leaders who unquestionably have to be accountable and that is the

CEO– as they set the organizational tone, strategy and priorities, the Chief Human Resources Officer (CHRO)– as they set and own the people practices and associated culture and finally, the CFO – as they set the financial resource allocations. (personal communication, February 15, 2016)

In sharing the evolution of the reporting relationship and leadership accountabilities, Participant #2 submitted,

This role used to report lower in the organization and my predecessor, despite their best efforts, couldn't get any traction. At that time, the organization believed that the CDO was the sole person responsible for diversity & inclusion. As a condition of my accepting the role, I required that it report to the CEO. Then in short order, I lobbied the CEO and the Board that all of the Leadership team have specific accountabilities related to D&I. What gets rewarded gets done. Now, we've not only been able to get traction, but also make solid progress because everyone has skin in the game. (personal communication, February 17, 2016)

Business leaders have an opportunity to send powerful messages when they consistently demonstrate their commitment to Diversity & Inclusion (D&I). It moves beyond rhetoric to personal experience (Groysberg & Connolly, 2013). In short, leaders' behavior influences culture (Schein, 1985).

Interview question two: Summary. The best practices that CDOs accounted for involved culture, programs and leadership. Each of these practices underscored the importance of these elements individually and collectively. The CDOs provided specific actions they took to achieve best practice for their organization. The data indicated that

these actions were critical to establishing best practices in creating and sustaining an inclusive workplace.

Interview question three: Hindrances to inclusion. The third interview question associated with Research Question One asked, What practices do you think hinder inclusion? This question sought to identify speed bumps and organizational obstacles. Similar to the themes that emerged from the prior question regarding best practices, the main themes that emerged here were culture and leadership (see Figure 7).

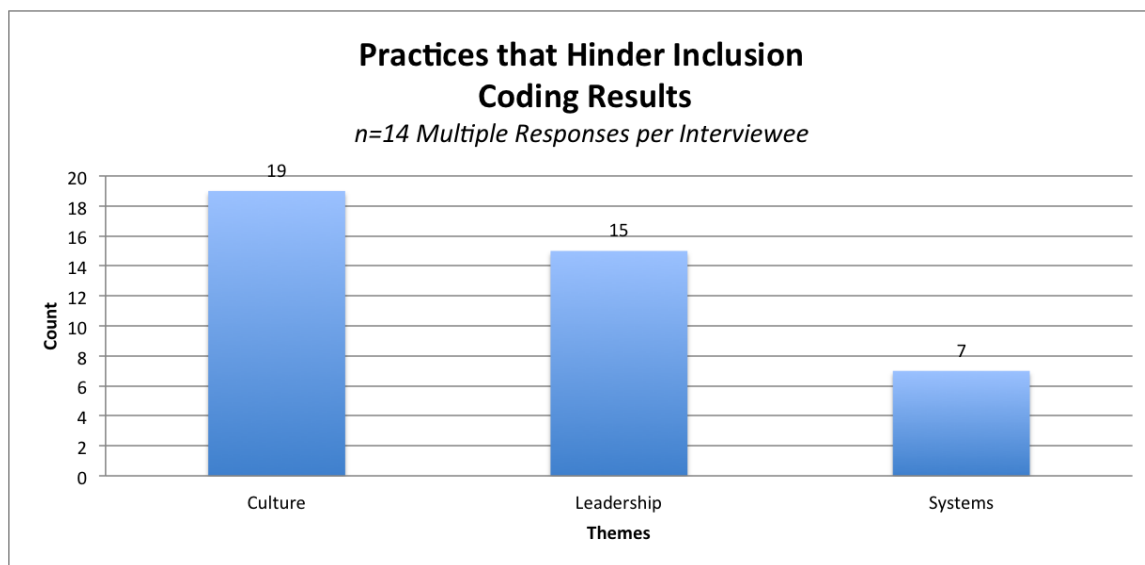


Figure 7. Practices that hinder inclusion.

Culture. Schein (1985) defined culture as a pattern of shared basic assumptions that a group most often learns in solving problems and achieving integration. Overall, participants noted 41 practices that hinder inclusion. Nineteen (43%) responses were ascribed to culture. Respondents spoke of the cultural tolerance and acceptance of apathetic and ill-skilled middle managers, consistent disrespect, lack of resources, and cultural malaise preventing change. Also cited as a hindrance were unchecked unconscious biases, which manifest in the form of institutionalized micro-inequities.

One of the first things that we addressed was unconscious bias. We all have biases and but they can have detrimental impact on individuals and collectively, on organizations. When they are left unchecked, they become part of cultural fabric and slowly degrade systems and processes. (Participant #10, personal communication, March 15)

To echo the importance and impact of culture, Participant #6 simply stated, “Culture eats strategy for breakfast” (personal communication, February 19, 2016). In essence, culture is the preeminent factor of inclusion.

Leadership themes. Leadership is the source of the beliefs and values, which requires leaders to understand the deeper levels of culture (Schein 1985). In regard to leadership, respondents addressed leaders’ lack of support and authenticity as significant hindrances to inclusion. Fifteen (37%) practices were categorized herein. These were manifest in senior leaders not being engaged or accountable for organizational inclusion. Concomitantly, leaders who failed to provide visible, demonstrative, financial, and related support could counteract other great work in the organization. Participant #4 shared an experience that highlighted the impact a misaligned leader can have on the organization:

Up until recently, we had a senior leader who failed to engage in our efforts around diversity and inclusion. Interesting enough, there were notable efforts occurring organically beneath him in support of D&I. But his indifference became a deterrent and began to dampen the energy and accomplishments of his team. A surprise to no one, that team began to hemorrhage talent and obviously,

started to miss their targets. At that point, it got the attention of the most senior leaders. (Participant #4, personal communication, February 18, 2016)

Interview question three: Summary. The CDOs identified culture, leadership and systems as key hindrances to workplace inclusion. It was interesting to note that culture and leadership were also identified as required elements in best practices. Their repetition as a hindrance would demonstrate how critical they are to inclusion. The element of systems was least reported indicating that it was not a significant hindrance.

Interview question four: Resources needed. The final interview question that corresponded to Research Question One was, what resources did you need to recruit and retain diverse employees (assuming creating an inclusive work environment starts with talent acquisition)? Recruitment and retention require strategic thought and active planning.

Financial resources. The respondents identified 30 distinct resources. To set the stage for the significance of resources, Participant #7 was emphatic. “The only way that this work gets done is if the organization places a priority on it and then resources it accordingly” (personal communication, February 26, 2016). In the data coding process, three primary themes arose in response to this question: financial resources, interdepartmental support and systems/processes (See Figure 8). Of the 30 total responses, 12 (40%) were attributed to financial resources, which consisted of budget for staff resources, programs, marketing, branding, and communications.

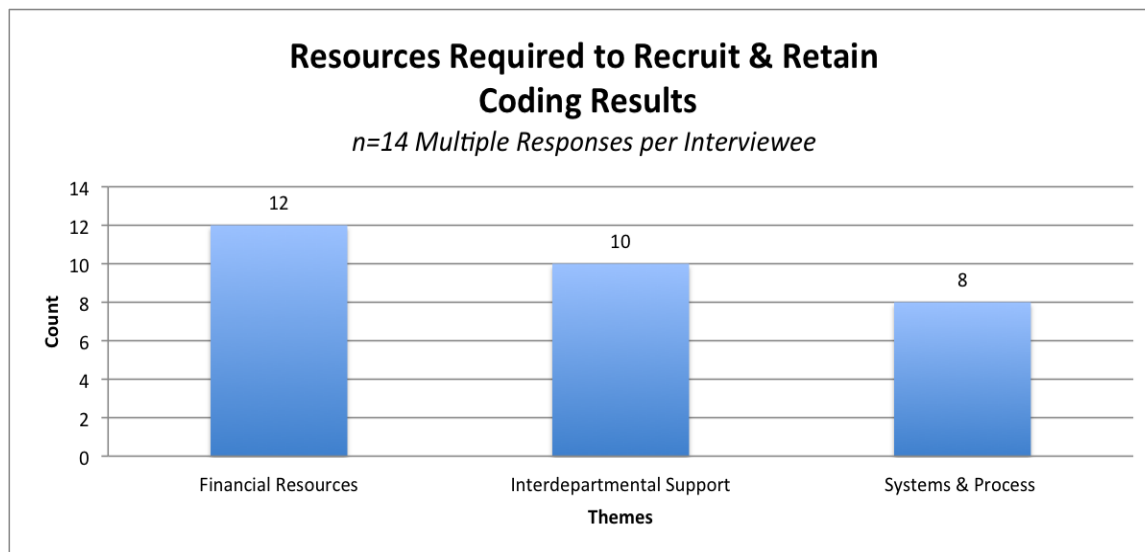


Figure 8. Resources required to recruit and retain.

Interdepartmental support. Upon review of the transcriptions and notes, interdepartmental support had 10 (30%) resources allocated. Specifically, interdepartmental support was described as collaboration in creating a supportive organization. Participant #9 captured this factor succinctly; “One of the overlooked resources to recruit and retain diverse employees is creating a web of collaboration and support” (personal communication, March 1, 2016). Further, Participant #3 provided the following analogy to illuminate interdepartmental support;

Do you know about the redwood trees? They could be the model that we follow in organizations and teams within them. Redwoods grow up 300 or 350 feet tall. Redwoods only reach their height because they grow close to each other. Despite their height, their root systems are quite shallow. They thrive because their roots interlock and integrate with the systems of surrounding trees, which supports them. That’s how we should look at talent management. How can we create an interlocking/supportive system to recruit and retain our employees? (personal communication, February 18, 2016).

In the ideal workplace, there would be one organizational support construct that considers respect and support for all from all groups (Huffman et al., 2008). Social support is anchored by interpersonal interactions at work.

Systems and processes. Systems and processes were also put forth as vital resources, garnering eight (26%) of the responses in the category. Specifically, these included talent management systems and processes, which were thought to be requisite resources. In addition, the data consistently revealed that a systems approach is important to recruiting and retaining talent. Systems thinking addresses how one element interacts with the other elements within the system (Senge, 1990).

I want to change my answer to this question. I don't think that answer is the obvious resources like financial resources. I think that it's in fact, learning resources. Specifically, it's learning resources to facilitate our thinking about diversity systematically, whether we're talking recruitment, retention, promotion, rewarding. We should think of this from a system, not a singular unit or singular issue perspective. (Participant #14, personal communication, March 18, 2016)

Also relative to systems and process, respondents spoke of leveraging existing talent management systems. The most frequently talent management systems was applicant-tracking systems for recruitment and employee satisfaction for retention. Pertinent to D I, two respondents referenced their recent adoption of applications, which reduced gender bias in recruitment postings. Given a systems approach, removing or mitigating bias could positively impact the other elements in the system.

Interview question four: Summary. Resources represent a vital component to sustain organizational efforts. The CDOs reported that the most significant resources

were financial, interdepartmental support and systems. While the delta between each of the reported themes may not appear to be significant, the CDOs spoke of the lack of financial resources being the most necessary.

Research Question One summary. Overall, Research Question One provided clear insights regarding the requisite strategies and practices to promote inclusion. Responses to the interview questions posed related to the research question and insights gleaned from the review of literature research implied that culture, leadership, and systems could be high impact levers to either facilitate or obstruct the CDO's and organization's progress. Schein (1986) substantiated this understanding, asserting that leadership, strategy, and organizational culture are linked in the process of change. In summary, Bass and Avolio (1994) expanded upon that assertion, stating that the change rests, rules, and abides in the heart of leadership and the systems they deploy.

Research Question Two

Research Question Two sought to identify the challenges that CDOs face in implementing strategies and practices to achieve inclusion. There were initially four corresponding interview questions. Yet, as previously addressed, during the actual data collection phase only two of the corresponding questions were asked. The two questions that were posed more closely aligned with the research question and directly solicited data related to challenges faced and resilience exhibited. The questions were (a) what were/are the major challenges in creating an inclusive work environment, and (b) how did you deal with and/or overcome those challenges.

Interview question one: Challenges. Given that none of the participants had achieved the panacea of inclusion, they freely addressed the challenges in embarking on their journey to inclusion.

I don't think that you have enough time to record all of the challenges that me and my fellow CDOs encounter. I liken it to being a pioneer or space explorer. No matter how many challenges you anticipate and prepare for, there always a slew more that you didn't. You just can't get discouraged by the challenges. I refuse to allow temporal challenges derail permanent changes. (Participant #1, personal communication, February 15, 2016)

Lack of resources. The themes that emerged from their responses primarily included challenges associated with various elements that were lacking. Respondents provided 30 distinct challenges, which were attributed to the categories depicted in Figure 9. There were 12 responses (40%) aligned under lack of resources, 9 (30%) mentions each for lack of support and lack of cultural malleability (See Figure 9).

Similarly, Participant #2 addressed the challenges associated with lack from the vantage point of resources and resistance to change.

Whew, this has been a challenging experience. I feel like it's been a nonstop and very intense round of whack a mole. Just when I think I've resolved one challenge, another series of them arises. The major challenges have been two-fold. They revolve around the absence of something that is critical to move forward or the existence of something that seems daunting to change. (personal communication, February 17, 2016)

Participant #11 summarized her perspective on challenges. “I just think of the challenges as a part of the journey. What we have sought to do is transform a culture that has evolved into its current state for decades. Inherently, that is fraught with challenges” (personal communication, March 15, 2016).

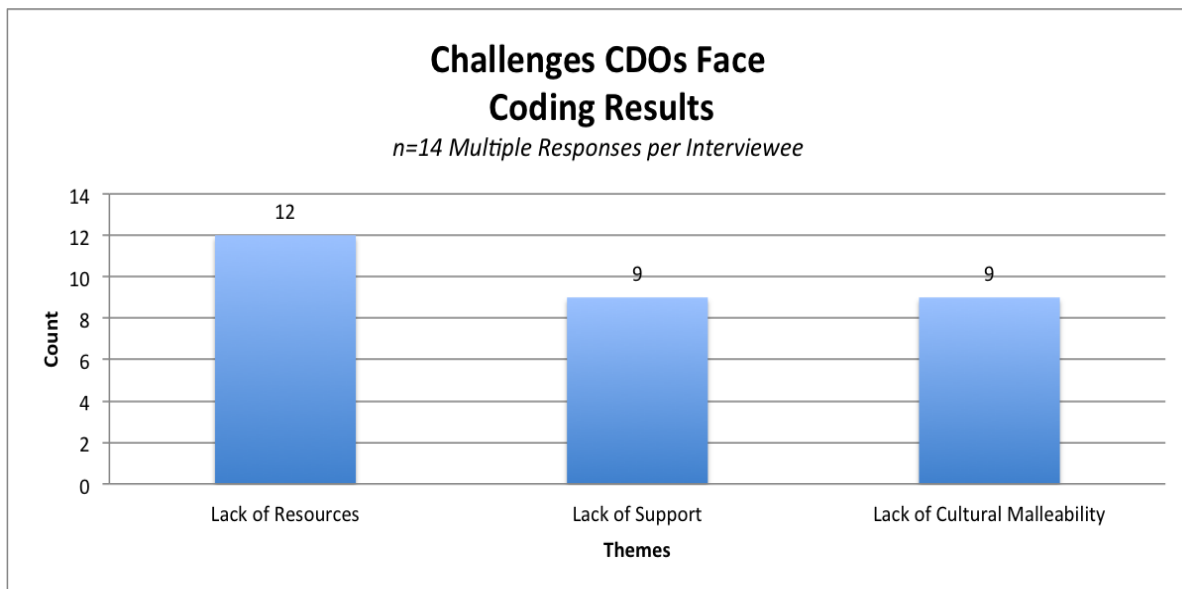


Figure 9. Challenges CDOs face.

At various points during the interview, the CDOs expressed that transformation takes time. Four of the CDOs referenced that time could be considered a challenge. Upon further probing, the participants relayed that the length of time it takes to see progress could be perceived as a challenge. It is noteworthy that none of the CDOs considered that they had completed their journeys. In fact, all respondents acknowledged that their journeys remained in progress and that the destination was far in the future.

This concept, which we all ascribe to, of being on a journey to achieve workplace inclusion is I think the longest trip that I’ve ever been on. I submit that its length directly correlates to the challenges that my organization has faced in getting to the destination. As well, I think that as the organization evolves, new

opportunities present new challenges. (Participant #5, personal communication, February 19, 2016)

Interview question one: Summary. In articulating challenges that they have faced, the CDOs indicated that the preeminent ones were lack of resources, support and cultural malleability. The former two echo themes gleaned from the earlier interview question regarding resources. Likewise, cultural malleability reiterates an element of best practice.

Interview question two: Responding to challenges. The second interview question sought to understand how the CDOs responded to the challenges they faced. The question asked was how did or do you overcome challenges. Figure 10 summarizes the elements of the responses. The data revealed three primary areas (see Figure 10):

1. Review and realign
2. Revisit learning
3. Resign

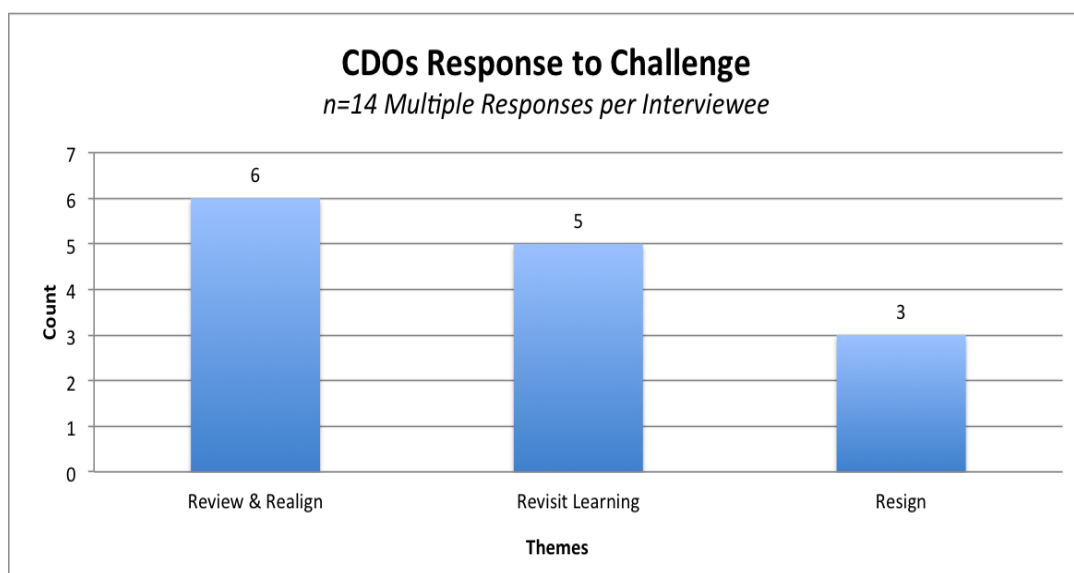


Figure 10. How CDOs deal with challenge.

Review and realign. Reviewing the challenge and reassessing the current state emerged as a dominant theme. Participant #7 shared the repositioning approach she uses to deal with challenge:

I have to be honest. I've faced very few challenges in getting D&I off the ground here. I know that I'm fortunate, but I attribute it to an enlightened executive team. They inspire us all by their passion and true commitment. Depending on the scale and scope of the problem, I've usually overcome it by repositioning a program, message, strategy, etc. My experience has been that quick responses have mitigated most of the challenge. I've learned to realign, be super flexible and pivot fast. (personal communication, February 26, 2016).

Revisit learning. For several respondents, the existence of a learning rich culture served as a viable and productive response to challenges. For these participants, learning counteracted many of the challenges that they faced.

We spend millions of dollars each year pouring into the development of our employees. It is one of our differentiators in the market. It is also the first place that we look when any area of our business is challenged. If our financials are trending to be slightly off target, our CEO asks if there is a missed learning opportunity. The same is true with my work, if we encounter challenge; we revisit our learning profiles. (Participant #10, personal communication, March 15 2016)

The Learning & Development lever was also deployed in Participant #8's organization.

We see our journey as being paved by learning. What comes to you dressed like challenge is usually a teachable moment. I know that training doesn't solve all problems, but in the early stages like where we are, it helps. At a minimum,

expanding awareness through our learning and development function has provided useful context to understand the nature of the challenge. (personal communication, February 26, 2016)

Resign. In 29% of the 14 respondents' cases, their response to the challenges resulted in their exiting the organization. Of those, each of them reported that the decision to resign was his/her own and was prompted by the overwhelming challenges that they faced. Participant #7 reflected on his experience.

I didn't accept this role, to then resign a short time afterwards. But, I'm not sure how anyone could overcome that situation. For 2 years, it was promised that I could hire a team. I did my due diligence and put forth my headcount request and every year it was denied. Yet, I watched other teams grow. When I questioned why, I was told that to do D&I work, the part time graduate school intern and myself were enough. This was a global organization with thousands of employees. Unfortunately, I don't think that they had realistic expectations. For me to do the type of work that I wanted and to have the impact that I know that I could, opting out seemed the most reasonable solution. (Participant #7, personal communication, February 26, 2016)

A second respondent shared some of the preeminent reasons that facilitated his exit.

I am not faint of heart and I'm not a quitter. I had five bosses in 17 months. The C-suite couldn't seem to decide where my function should align. The back and forth just seemed to confirm that this wasn't important nor was I. (Participant #13, personal communication, March 18, 2016).

Interview question two: Summary. The CDOs reported responding to challenges in three ways. Those ways included realigning, revisiting learning and resigning. Realigning and revising learning underscored collaborative actions. Resigning, on the other hand, underscored the independent action based on the CDOs assessment of long term viability.

Research Question Two summary. Research Question Two provided the participants the opportunity to move from context to challenges and how they responded to them. The data revealed that the greatest challenges were borne out of lack and the greatest responses were borne out of resiliency. Resiliency was inherent in those elements that encompassed realigning and revisiting, which equated to almost 80% of their responses. Finally, in those cases where the challenges were overwhelming, the CDOs opted out of those roles. When this did occur, the respondents were reflective and articulate that the seeming lack of viable options predestined their departure. Overall, this research question elicited transparency. There was transparency regarding the challenges faced, and transparency regarding their response to those challenges up to and including resignation.

Research Question Three

It was alluded to in the interviews that effective CDOs consider their work to be strategic as well as the outcomes that it achieves. Therefore, measuring the impact and contributions is requisite to assess the performance of the strategies they deployed. Performance management systems allow an organization to monitor its plans to determine their success and if they require improvement or not (Atkinson, Waterhouse, & Wells, 1997). The third research question queried the CDOs regarding the metrics

that they deployed to assess success of their practices. Three corresponding interview questions were designed to probe for a description of the qualitative elements, quantitative measures, and benchmarking.

Interview question one: Elements of inclusion. Prior to discussing assessments and measures, the first interview question requested that the CDOs describe the elements of a successfully inclusive work environment. This question allowed participants to consider either those elements, which existed in their organizations, or those that they envisioned. The elements cited coalesced around common themes.

Participation and respect. From the data, 88 elements were shared. The five most often stated responses are depicted in Figure 11 and involved:

1. Participation and respect
2. Leveraging diversity as a competitive advantage
3. Policies and Practices that are integrated and aligned
4. Demographics that are representative of the community, customer and broader geography of operation
5. Compassion

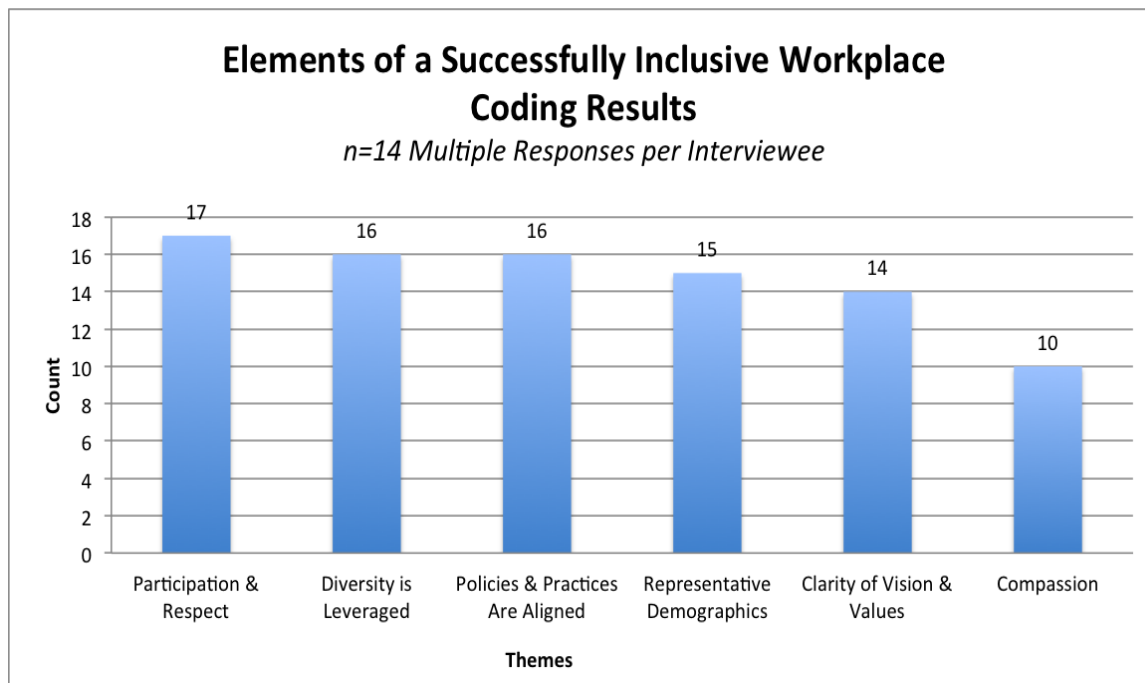


Figure 11. Elements of a successfully inclusive work environment.

Participation and respect. Respect and participation, according to Participant #12, are the preeminent elements of a successfully inclusive workplace. Participant #12 stated:

Inclusion requires access to participate, which in my mind implies respect.

Consider this, if I were having a meeting to solve a problem, I would invite those to participate that I respect, revere and value. That's exactly what our businesses are doing, or should be doing with regard to inclusion. We shouldn't exclude, as that is probably the most clear and visible sign of disrespect (personal communication, March 15, 2016).

Leveraging diversity. This element spoke to the opportunity to view difference as a strength. In doing so, CDO's reported that considering diversity as a strength could then be a competitive advantage. Therefore, diversity could be leveraged to yield positive outcomes.

Policy alignment. Alignment in this regard addressed harmony. Specifically, the CDO's noted the importance of ensuring that the organizational policies and practices supported inclusion. Otherwise, employees would experience an organization whose practices and policies were obstructions versus facilitators to an inclusive experience.

Representative demographics. CDO's reported that successfully inclusive organizations had diverse employee rosters. Particularly, they felt that their employee rosters should be representative of the communities in which the organization operated. As well, it was thought important that the demographics also represented the customers of the organization.

Clarity of vision. Vision was thought to be an important element of successfully inclusive environments. Given the criticality of engaging broad stakeholders in the journey. The CDO's noted that the vision must be clearly articulated and understood by all.

Compassion. In probing further, respondents described compassion as being "other oriented and focused" and "having a positive effect on others." To clarify, Participant #13 described the relationship between compassion and inclusion.

Amplifying that same point Participant #6 offered:

There is a body of research that states that people are likely to catch the emotions of their leaders, which implies that workplace emotions are contagious. Imagine just for a moment the firestorm that would take place if leaders led with and authentically demonstrated compassion. I submit to you that it would propel

our journey faster and further than we could anticipate. (personal communication, February 19, 2016)

“Compassion and inclusion are siblings, best friends that need each other” (personal communication, March 17, 2016).

Interview question one: Summary. The data derived from this query concerning the elements of successfully inclusive environment closely aligned with the elements of the definition of inclusion. The elements of successfully inclusive environments included participation, differences being leveraged, alignment of policies, representative demographics, clear vision and compassion. To recap, the definition of inclusion elements, were also participation, embracing differences and consideration, which closely paralleled the CDO’s definition of compassion.

Interview question two: Measures leaders value. Having an understanding of the elements of an inclusive workplace provided perspective of the elements to measure. The importance of measurement was shared by all of the respondents. Specifically, the second interview question asked about the measures that leaders value.

Representation and engagement. As noted, the criticality of measurement was repeated often. Participant #9 shared the following thoughts on measurement:

Of course, we measure the results of our initiatives and efforts. Inclusion represents a strategic business opportunity, just as, for example, expanding our product line or extending into a new territory. We would expect and require those leaders to present a compelling business case, replete with measures and

milestones. I am expected and required to do the same. (personal communication, March 1, 2016)

The importance of measurement was shared by all of the respondents. From the data, the salient themes regarding the quantitative measures that CDOs value coalesced around four themes. The themes, which are depicted in Figure 12, were:

1. Representation
2. Engagement
3. Retention
4. Other

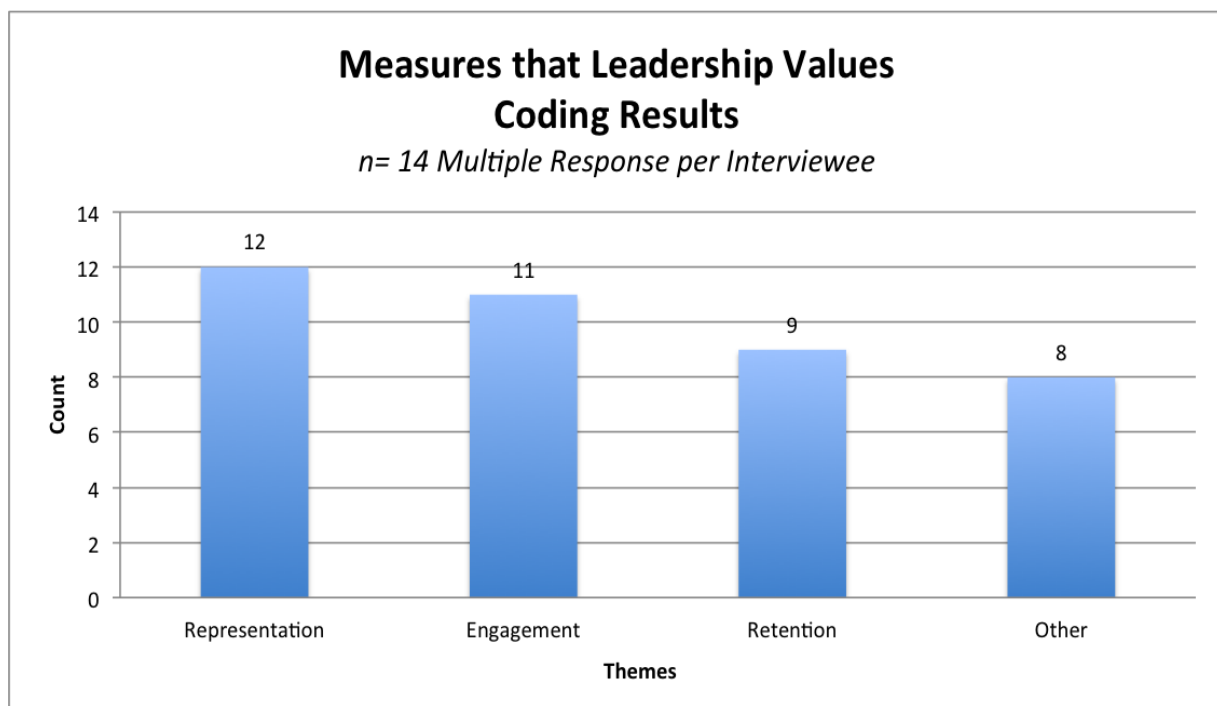


Figure 12. Measures that leadership values.

There were 40 measures collectively cited. Of the 40, 12 (30%) were cited within Representation. The most noted measures were increases in diverse employee representation, increased representation of diversity at varied organizational levels, diverse hiring sources, and increased throughput or yield of diverse candidates (e.g.,

resumes, interviews, offers, acceptances, starts). Within Engagement, 11 measures (28%) were cited. Engagement measures included climate surveys, employee satisfaction, employee referrals, increased participation in affinity groups, and increased participation in voluntary learning/training programs. Retention, which had nine (23%) responses attributed, was focused primarily on key talent, differential between high/low performers, and turnover rates by leader. The Other measures had eight (20%) mentions credited to it; respondents referenced supplier diversity, client feedback regarding innovation, Intercultural Development Inventory, project assignments, and correlation between mentoring and promotions.

Retention. Three of the respondents spoke of the measures that their leaders valued as leading versus lagging indicators. Leading indicators are those that predict employee experiences. Lagging indicators represent measures that look back and capture what has already occurred. Retention is a lagging indicator. “Most experienced CDOs have scorecards that address demographics, environment, program effectiveness and business impact. We’re not there yet. We’re still focused on lagging indicators, which are retrospective in nature” (Participant #10, personal communication, March 15, 2016).

Throughout the interviews, the CDOs discussed their assessment of where their organizations were in the quest for inclusion. The data indicated a wide range of progress along the journey and organizational maturity. Despite being at varied states, each respondent underscored the need for measurement at every stage.

When we first started this journey, we knew that to move forward and engage our stakeholders, we had to have measurements. I mean, we had to have

measurements. So, we started with a short list of easy to gather and assess metrics that primarily focused on visible difference, or diversity, and representation. As we have evolved and gotten further down the path, our measurements have evolved as well. Now, we measure everything. (Participant #1, personal communication, February 15, 2015)

According to Hubbard (2004a), leaders should establish a credible measurement strategy and measurement process to identify the specific measures that highlight the links to bottom line performance. “There is an adage that says what gets measured gets done. As a tech company, we subsist on data and metrics. Our mantra is if we don’t measure it, we can’t improve it” (Participant #3, personal communication, February 18, 2016). To summarily capture the significance of measurement, Participants #4 and #12 provided Table 4, which identifies the combination of the diversity and inclusion measures that their organizations monitor.

Interview question two: Summary. According to the CDOs, their leaders value measures of representation/engagement and retention. These measures were cited as being either leading or lagging. Leading measures, or indicators, predict and plan for. Lagging measures are retrospective. Many of the CDOs reported that their focus had been on lagging measures.

Interview question three: Benchmarking. The third interview question inquired about benchmarking. The question posed was, what methods did you employ to benchmark and track inclusive workplace practices? In general, benchmarking is the process for comparing the key business attributes of a process or program to others in the industry. Benchmarking usually provides a snapshot in which ongoing monitoring

and assessment can occur internally and/or externally to identify areas of opportunity as well as areas of excellence.

Table 4

Annual Measures for Global Inclusion

Creating a Diverse Workforce	Managing a Diverse Workforce	Valuing a Diverse Workforce	Leveraging a Diverse Workforce
Representation	Promotions	Culture & Environment	Customer Satisfaction
Turnover	Career Pathing	Language(s) in workplace	Workforce Representative of Customers
Job Offer Acceptance	Reductions in Force	Utilization of Benefits	Community & Corp Image
Tenure	Hiring Freezes	Leadership Behaviors	Participation in Vendor Fairs
Voluntary Terms	Succession Planning	Networking Groups	Community Relationships
Talent Acquisition Costs	Performance Reviews	Organizational Attitudes (Culture)	Success/Failures in Global Markets
Turnover Costs	ADA Accommodations	Referral Usage	
National Demographics	Litigation	Integration of D&I in Talent Management	
Returns from Leaves of Absence	Grievances & Complaints	Events highlighting Inclusion	
Skills & Languages	Mentoring	Organizational & Executive Access	
	Compensation Analysis	Inclusive Language	
	Training Program Attendance	Barriers to Contribution	

Informal benchmarking. The data, summarized in Figure 13, revealed that seven of the 15 CDOs benchmark utilize informal methods, such as peer relationships, six CDOs do not benchmark at all, and one (Participant #11) participates in formal industry benchmarking.

We participate in an annual industry survey, for all core functions – which for us is Finance, Sales and Human Resources. We try to keep our measures as straightforward as possible. Essentially, they include attrition, employee

engagement, external recognition and promotions. (Participant #1, personal communication, March 15, 2016)

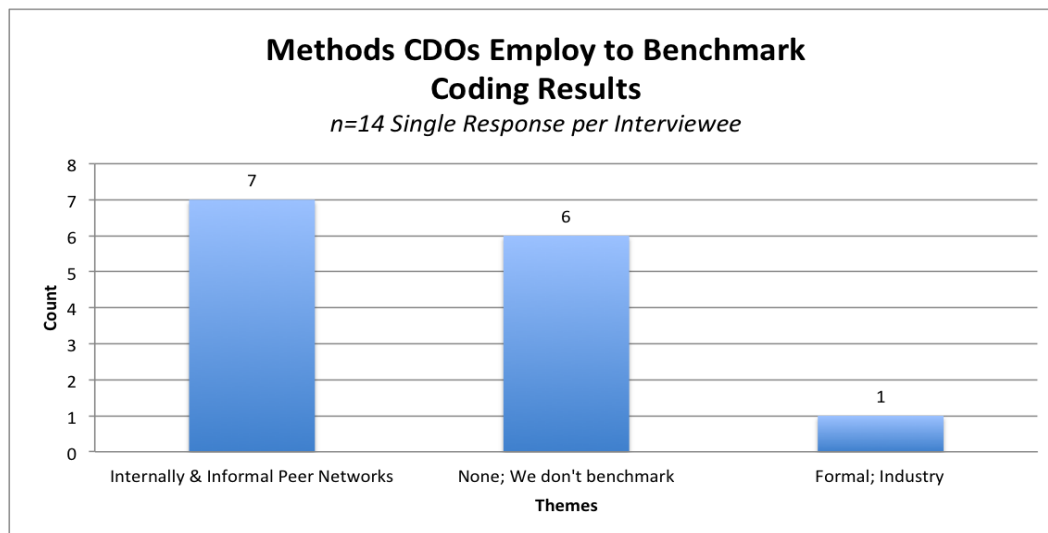


Figure 13. Methods CDOs employ to benchmark inclusion practices.

Seven CDOs indicated that they benchmark either internally or informally. Those who benchmarked informally via peer networks said, in all cases, that it consisted of calls to their peers to inquire about a specific practice or response to an email solicitation from a membership-based organization to which they belonged. In contrast, internal benchmarking consisted of tracking key metrics within which their organization and reflected year of year progress.

No benchmarking. Six of the CDO's indicated that they did not actively participate in benchmarking. For them, benchmarking represented an opportunity to explore. Specifically, they correlated benchmarking as a process for those organizations who had made more progress in their journey to inclusion than that felt that they had currently achieved.

Interview question three: Summary. Overall, formal benchmarking was not a preeminent practice for the CDOs. Half of them reported informally benchmarking

externally on a sporadic basis. The remaining respondents indicated that they did not benchmark at all.

Research Question Three summary. It was clear from the respondents that there is a strategic imperative associated with creating an inclusive work environment. Further, the CDOs universally agreed that thoughtful and aligned performance measurement reinforced the strategic imperative and solidified D&I as a vital corporate function. The data implied two correlations. First, once the elements of a successfully inclusive work environment were identified, a correlation to the measures was revealed. Table 5 outlines the correlation. Second, the data implied that there was a correlation between the sophistication of the metrics and the maturity/progress achieved relative to creating an inclusive workplace.

Table 5

Elements of Inclusion with Corresponding Measures

Elements of Successfully Inclusive Environments	Corresponding Measures
1. Participation & Respect	Engagement
2. Diversity = Competitive Advantage	Engagement Retention
3. Integrated Policies & Procedures	Retention
4. Representative Demographics	Demographics
5. Compassion	Engagement

Research Question Four

Demographic shifts, demands for innovation, comfort with difference, and the shrinking globe will have a clear impact on the workplace of the future. It is expected that the next generation workplace will, in many cases, be virtual, collaborative, connected, and inclusive (Townsend et al., 1995). Research Question Four sought to allow CDOs to imagine that future workplace and expressly share their

recommendations for those who are about to embark on the journey. The corresponding interview questions were, (a) what cautionary tale(s) would you share with executive leaders in the implementation of inclusive workplace practices, and (b) is there anything else that you would like to share about implementing inclusive workplace practices?

Interview question one: Cautionary tales In regard to the interview question about cautionary tales that the respondents would share; the data suggested two primary themes. The themes were (a) setting an integrated stage for the implementation (culture) and (b) keeping analytics in the foreground (measurement; see Figure 14). CDOs reported keeping analytics in the foreground by reiterating the necessity for measurement and quantifiable analysis, which accounted for six (40%) elements.

Setting the stage. CDOs shared various attributes that were coded as setting the stage or laying the foundation, of which 8% (60%) fell into this category. In reviewing the data, the elements of setting the stage tied back to organizational culture. The attributes were:

1. Setting a compelling vision
2. Engaging executives early
3. Espouse cultural transformation
4. Defining acceptable behaviors (norms)
5. Challenging long standing patterns and practices
6. Aligning individual performance

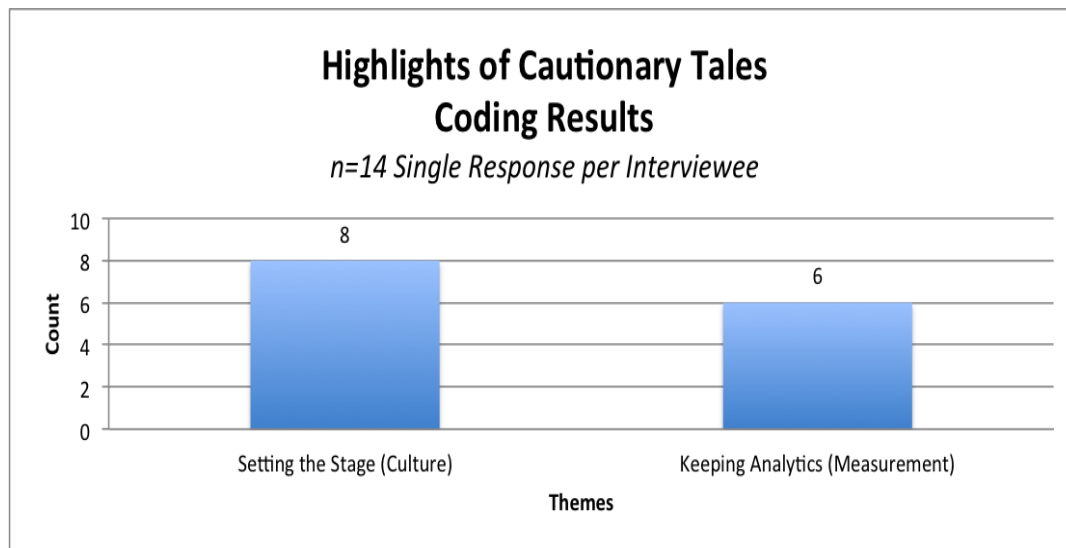


Figure 14. Highlights of cautionary tales.

The cautionary tale that Participant #6 shared captured much of the essence of the elements of culture.

I said earlier that culture eats strategy for breakfast. I believe that to be true and I believe that it indicates where someone doing this work should start. Breakfast is the start of the day and it's the most important meal of the day. Therefore, my cautionary tale would be to start with culture and recognize that it's the most important thing to focus on at the beginning, in the middle, throughout and in the end because it eats strategy. (personal communication, February 19, 2016).

Keeping analytics (measurement). The respondent's perspectives aligned with the research. The intensity of organizational culture can have a direct impact on intra-group relationships and moderate inclusion (Chuang, Church, & Zikic, 2004). Setting the stage implies preparation before execution and measurement.

I would caution executives to accept that this work is primarily about experience and not about numbers. I'm not saying that it cannot be measured because we do. Just know the difference. Diversity is about numbers. I would tell them

diversity is about counting heads while inclusion is about making heads count and feel counted. Therefore, the initial step should be to prepare for the experience, which means assessing and examining the organization and the key leaders within it. Prepare them for the experience and prepare the organization to support inclusive experiences. Lastly, I would tell them to be dexterous enough to shift and switch as necessary. (Participant #7, personal communication, February 26, 2016)

The cautionary tale that Participant #6 shared highlighted doing things “differently” and introduced the concept of branding. Branding is essentially a promise of expected performance or a commitment by an organization (Love & Singh, 2011).

The workforce of the future will be different. It is uncharted waters, a new frontier. It will mandate that we respond differently. We will have to recruit differently. We will have to lead, assess and manage differently. We will have to brand differently. (Participant #5, personal communication, February 19, 2016).

Given that Research Question Four had a reflective orientation, allowing CDOs to imagine the future state, interview question #8 was relocated as it seemingly better aligned with this research query. Interview question #8 asked if the CDOs think that the characteristics of an inclusive workplace would change in the future. Figure 15 represents their responses.

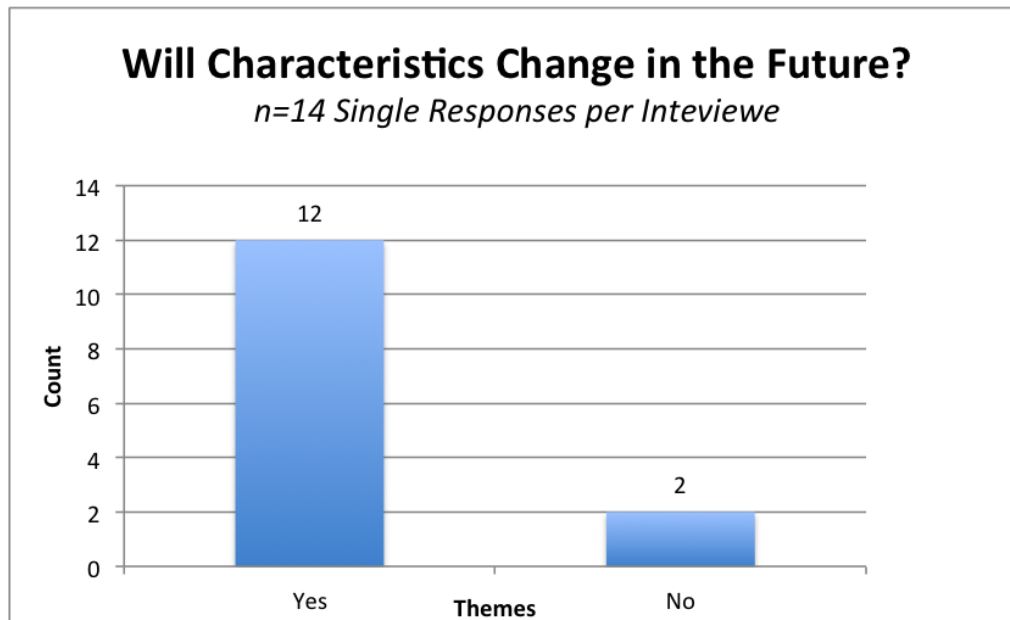


Figure 15. Will characteristics change in the future?

Future characteristics. Believing that the characteristics would change, Participant #6 stated, “Yes, I think the characteristics will change. They will continue to evolve. Think about the fact that we didn’t have the concept of inclusion a couple of decades ago. Assimilation was the goal that we aspired to achieve” (personal communication, February 19, 2016). Conversely, Participant #4 offered,

I don’t think that the characteristics will change. Right now, it’s a pretty high bar and a long game. I think that the shifts to this point have been seismic. I don’t anticipate more change. If we can consistently deliver on an employee experience that embraces 95% of the elements, I think we call that victory. (personal communication, February 14, 2016)

To that end, effective branding allows the organization to distinguish itself via desirable practices and be attractive to employees and prospective employees (Love & Singh, 2011). The earlier theme that emerged regarding keeping the analytics in the foreground, referenced back to the earlier question regarding measures. Eight of the 15

respondents repeated the importance of measurement. No additional insights were provided.

Interview question one: Summary. The responses that the CDOs provided with regard to cautionary tales reinforced primary messages and themes. Specifically, they spoke of setting the stage, which addressed cultural factors as well as analytics, which addressed measures. Both of these were repeated from earlier inquiries regarding best practices or key elements. In addition, the CDOs indicated that given the dynamic nature of the workplace demographics and organization's quest for inclusion, there would be changes to the future characteristics.

Interview question two: Additional comments. The second corresponding interview question asked if the CDO had anything else that he/she would like to share. This question afforded the participants the opportunity to provide any additional thoughts. Only three respondents provided additional comments.

Inclusion is knocking on all of our doors right now. The best of us will smart and welcome Inclusion in. Those of us that aren't as smart will pretend that we're not home, and the new normal of the workplace will cause that knock to become so loud that it'll be deafening. (Participant #13, personal communication, March 17, 2016)

Employer brands. As a final thought, Participant #6 revisited his comments regarding employer brands;

It is interesting to me that some of the most admired consumer brands are publicly struggling with diversity and inclusion. I cannot help but wonder how long they can retain their brand standing against this backdrop. They may not

have a lot of time before there's impact to the brand. That's bad news for them, but could be good news for us. It provides us an opportunity to sneak in build an inclusive workplace and strong employment brand (personal communication, February 19, 2016).

In the last few moments of the interview with Participant #4 offered this quote by businessman Max de Pree (2004).

We need to give each other the space to grow, to be ourselves, to exercise our diversity. We need to give each other space so that we may both give and receive such beautiful things as ideas, openness, dignity, joy, healing and inclusion. (p. 17)

Interview question two: Summary. The majority of the CDOs did not offer additional comments. On the two occasions when they did, one shared concern regarding the current state of employer branding relative to inclusion. The other shared a quote regarding giving all the space to grow and be ourselves.

Research Question Four summary. Research Question Four set out to bookend the interview experience by encouraging participants to share their final insights. Throughout the data collection process, each of the participants was generous with his/her time and expressed his/her appreciation for having another opportunity to pay it forward. In this research question, the data confirmed the consistent theme of culture and measurement. The repetition of these themes would indicate their priority for anyone or an organization considering how to create an inclusive workplace for diverse employees.

Chapter Five: Conclusions and Recommendations

The necessity to better understand how to retain and engage diverse talent will increase with the anticipated demographic trends in the U.S. The purpose of this study was to determine the strategies employed and challenges faced by CDOs in creating an inclusive work environment for diverse employees and what measures and recommendations they would suggest to help others seeking to cultivate an inclusive work environment. The CDOs who participated in this study were at different points along their organization's journey to cultivate inclusion. Despite this, all participants reported attaining various levels of success in their service as their organizations' architects of diversity and inclusion. Their collective insights and achievements can provide a guide for others aspiring to undertake the same journey. To provide a balanced and comprehensive view, the CDOs described the barriers or challenges they faced. As well, many of their quotes are included so as to retain their perspectives in their voice. Their willingness to share their experiences, anecdotes, and stories could be instructive to current and future CDOs as well as organizational leaders.

The intent of this study was to provide an enhanced understanding of how to establish and sustain workplace inclusion. This study sought to augment the existing body of knowledge, support current and aspiring CDOs in their respective journeys to inclusion, and in doing so favorably impact the perceptions and experiences of diverse employees in the workplace. This chapter outlines the findings of the research, asserts recommendations for future research, and provides conclusions associated with the lived experiences of the CDOs.

Research Questions

This study investigated and identified the best practices used by Chief Diversity Officers. The four specific research questions explored during this study were:

RQ 1. What strategies and practices are employed by CDOs in global organizations to promote and facilitate inclusion of diverse employees?

RQ 2. What challenges are faced by these CDOs in implementing strategies and practices employed to achieve inclusion of diverse employees?

RQ 3. How do CDO's measure the success of their inclusive workplace practices?

RQ 4. Based on their experiences, what cautionary tales would CDOs share for future implementation of inclusive workplace practices?

Summary of Findings

The 14 participants in this study were current or former CDOs or held a comparably titled position within their organizations. Collectively, they possessed over 350 years of professional experience with over 80% or 280 years of experience directly related to service in a corporate or consulting diversity and inclusion capacity. With regard to gender distribution, 57% (eight) were men and 43% (six) were women.

Data were collected through one on one semi-structured interviews. The semi structured interview questions provided a flexible framework for the interviews. The objective was to engage the leaders in conversational dialogue to understand their experiences from their vantage points. A panel of experts provided clarity regarding the research questions. Over 140 pages of interview transcripts coupled with the handwritten notes served as the raw data. The principal researcher independently

completed the coding, which was subsequently verified by a three-step process to ensure inter-rater reliability and validity. From the initial coding process based on content analysis, major themes were identified and the results noted. The second step required the engagement of two peer reviewers. The results of the coding prepared by the researcher were upheld as all were in agreement.

The findings of this research address the lived experiences of CDOs in global organizations. These findings include the strategies that they have deployed, the challenges they have faced, and the recommendations that they would make. The goal of the findings is to provide: (a) a context for those aspiring to create an inclusive workplace, and (b) a blueprint to help others navigate their journeys to inclusion.

The experiences of the CDOs provided insights that corroborate the general findings of the study. Additionally, the richness of their stories exposed greater detail about the CDOs themselves. The icebreaker questions, “Tell me about your career” and “What prompted you to become involved in diversity and inclusion,” not only served to establish trust, but also revealed details about the career and personal journeys of the participants. Those details served to present collective themes, which suggested that CDOs possessed:

1. Compassion
2. Actualization
3. Resiliency
4. Strong personal fairness doctrines
5. Bias towards equality and social responsibility

In inquiring about their careers, each CDO spoke of his/her career in highly positive and purposeful terms with meaning and achievement. Specifically, they noted a desire to change behaviors for the greater good of the individual and the organization. Additionally, in every case in which they discussed their careers, some element of their personal life was also included. In many cases, personal life experiences served as a catalyst to do this work. There was a clear sense that each of them viewed himself/herself as principle-based servant leaders who sought to transform their respective organizations.

The importance of the leadership style of the CDO cannot be minimized. Inherent in their roles as architects is a change/transformation component. Higgs and Rowland (2011) proposed a leadership paradigm that is aligned with scope of the CDO role. This paradigm is predicated on leaders engaging employees to affect change. Essentially, leaders assume the role of an enabler, facilitating the conditions that inspire others to engage and grow in the transformation. This is in essence the heart of the CDO role, as revealed via the data and their personal stories. The transformation of followers' values is a requisite responsibility of transformational leaders. The goal is to transform the followers' values so as to align to the vision and support the goals. In doing so, it is intended to establish a trust-based workplace (Bass, 1985).

Trust was one of several elements that the CDOs cited as a requirement for inclusive work environments. More frequently cited were participation, leveraging diversity, and aligning policy and practices. In addition, demographics representative of the customer and community, clarity of vision and values, and compassion were also mentioned. These characteristics correlated directly with the components of great

cultures. Vision, values, practices, people, narrative, and place were the prerequisite elements to shaping a new and productive culture (Coleman, 2013). The main findings are outlined as follows.

Strategies and practices of CDOs in global organizations. The CDO is typically an organization's executive level diversity and inclusion strategist. Strategy is a set of guiding principles that facilitates a pattern of decision-making to yield desired outcomes.

A good strategy provides a clear roadmap, consisting of a set of guiding principles or rules, that defines the action people should take (and not take) and the things that they should prioritize (and not prioritize) to achieve desired goals. (Watkins, 2007, para. 2)

Vision and culture. The strategies and practices that the CDOs employed to promote inclusion were multi-faceted. One of the key elements of their strategies was a compelling vision and alignment with organizational values. "Without an appropriate vision, a transformation effort can easily dissolve into a list of confusing, incompatible, and very time- consuming projects which take you in the wrong direction or nowhere at all" (Kotter, 1996, p. 3). Other elements of their strategies included leveraging learning to activate awareness, engaging and holding leaders accountable, and blending inclusion rich practices throughout the employee life cycle. Various models regarding employee life cycle exist, but the most common stages include recruitment, onboarding/orientation, performance management, and transition. Relative to the common employee life cycle stages, examples that the CDOs cited of inclusion rich practices are reflected in Figure 16.

Common Stages of Employee Life Cycle	Examples of Inclusion-rich Practices
<i>Recruitment</i>	<ul style="list-style-type: none"> • Identify new talent pools • Bias mitigation in sourcing, assessing and offering • Create opportunities for people to connect • Optimize brand with evidence of diversity & inclusion • Deploy tools to reduction of gender bias in job posting and interviewing
<i>Onboarding/Engagement</i>	<ul style="list-style-type: none"> • Accommodate-Assimilate - Accelerate • Fully leverage employee affinity groups • Encourage building of personal network on day #1 • Assign allies & buddies
<i>Learning</i>	<ul style="list-style-type: none"> • Unconscious Bias & Implicit Association Programs • Create opportunities for employee's to connect & exchange learning • Respect & appreciate different learning styles •
<i>Performance Management</i>	<ul style="list-style-type: none"> • Allow broader set of career experiences for broader roles • High Potential Identification • Accelerated skill development for Hi Potentials • Sponsorship & Mentorship • Respect & appreciate different work styles • Link performance assessments to inclusive behaviors
<i>Transition</i>	<ul style="list-style-type: none"> • Compassionate exits • Honor the employee's dignity

Figure 16. Inclusion-rich practices per lifecycle stage.

In summary, the most often repeated strategies tied back to the organizational culture. Organizational culture includes the predominant and accepted systems of values and practices that are internalized by its employees (Starling, 1982) and can be a critical lever to drive inclusion. In reviewing the data, it became apparent that CDOs in global organizations view their strategies as being targeted to two focal points: individuals and culture. Participant #15 summarized this sentiment appropriately; “Our strategies, to be successful, have to serve two masters, our employees and our organizational culture” (personal communications, March 18, 2016).

Challenges. The CDOs expressed the challenges that they faced in highly objective terms, which spoke of their professional maturity and personal resolve. In many cases, their challenges were attributed to the lack of individual and organizational learning, which portended the chance to increase individual and/or organizational

capability. Organizational capability focuses on internal processes and systems, ensuring those employees' skills and efforts are directed toward achieving the stated goals and outcomes (Ulrich & Lake, 1990). Further, developing organizational capability is not achieved by quick fixes or simple isolated programs, but requires the adoption of shared tenets that determine and guide organizational behavior.

The data illustrated the need to insure that leaders and employees have a baseline of understanding of what it means to be an inclusive workplace and their responsibilities therein. In short, the challenges that the participants frequently articulated highlighted the absence of key resources and the lack of a pliable culture that could be transformed to accomplish the tasks at hand. Figure 17 summarizes the challenges the respondents cited by theme and subtheme.

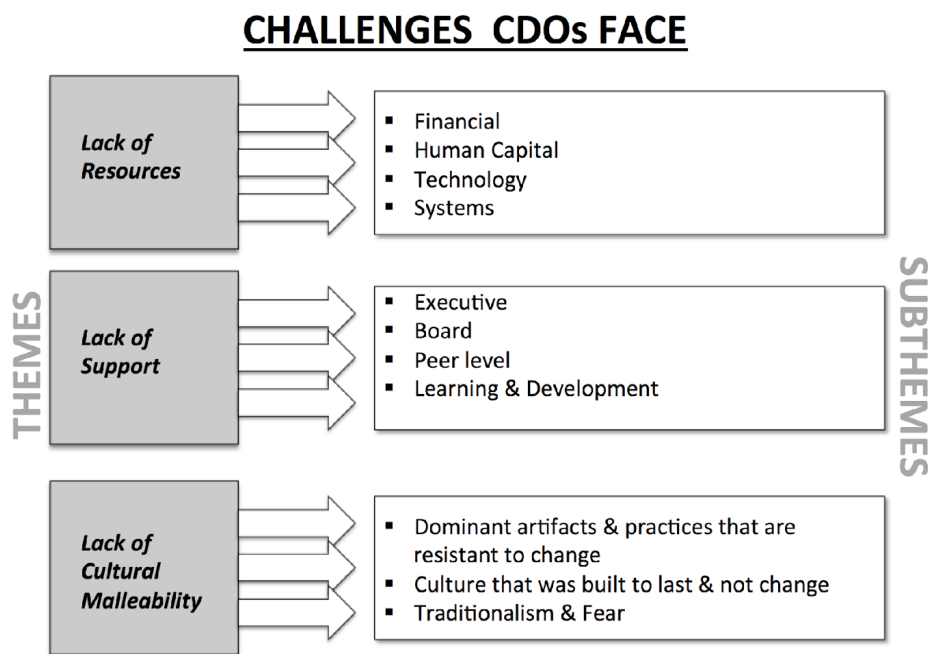


Figure 17. Challenges CDOs face.

Lack of Resources. The most significant and obvious lacked resource was that of budget or financial resources. CDOs shared the expectation of their ability to deliver

against global initiatives on shoestring budgets, while other areas appeared to be generously resourced. While the specific reasons for this may be unclear, insights shared by CDOs would suggest the preeminent need for CDOs to garner legitimacy and credibility for their function and their work. It would seem that unless an organization embraced the priority of inclusion, resources would be slow to follow. Similarly, another subtheme associated with lacking resources was human capital. CDOs spoke of the inability to deliver against the strategic imperatives to create a diverse and inclusive environment with little to no staff or human capital resources. Respondent #14 commented, “For my few years, the ratio of my staff to globally based employees was 1:9,000. I don’t think many would disagree that that is not ratio that is designed to support success” (personal communication, March 18, 2016). For comparison, the Bureau of National Affairs Guide to HR Benchmarks (2016) noted that for the 10 years between 2002 -2012, the median ratio of human resources staff to total headcount was 1:100 employees served by the HR department. The final subtheme aligned with lack of resources covered the lack of technology. In this case, CDOs referenced the lack of the technological tools to tell the necessary stories associated with their diverse employees and inclusive practices. For example, Participant #8 noted,

Tech tools and the data they provide can support and inform every single element of the inclusion strategy. When we lack those vital tech resources, we lack the ability to steer our time and resources to identify our issues, measure the impact and influence the results. (personal communication, February 26, 2016)

Lack of support. The second theme of lack highlighted the lack of support. CDOs identified the lack of support as primarily an absence of executive and board

support, as well as peer support. Specifically, CDOs correlated the lack of support to lack of engagement by these key organizational stakeholders. Additionally, the lack of executive and board support minimized what the CDOs felt was enterprise-wide influence. Lastly, the lack of support of the learning and development function also posed a noted challenge. The import with which CDOs viewed learning and development has been highlighted herein.

Lack of cultural malleability. In further exploring the third challenge of lack of cultural malleability, the CDOs noted that the preeminent manifestation of this was in the cultural resistance to change. Participant #3 shared,

This was most apparent when I would inquire about a practice and I'd get in response something like, well that's the way we do things. Equally as bad was my other favorite response was do we really need to do this especially since we don't know what we'll get from it. (personal communication, February 18, 2016)

Measuring success. The CDOs did not equivocate on the importance of measurement. Participant #1 remarked, "Measurement and evaluation accompany every important business strategy" (personal communication, February 15, 2016). Many of the respondents spoke of measurement as the link to ensure organizational credibility and maintain organizational priority. According to Kaplan and Norton (1992), senior leaders appreciate that there is a direct connection between the organization's measurement system and the behavior of employees. When asked about measures, several respondents discussed the early challenge that they faced with regard to establishing organizational legitimacy of diversity and inclusion. Participant #1 described it thusly; "The first battle I fought was the perception that this is nice to do

work versus must do work” (personal communication, February 15, 2016). Therefore, to counteract perceptions that diversity and inclusion is *fluff*, CDOs employed measurements and scorecards to assess progress against key performance indicators. Further, they ensured that the selection of the key performance indicators was the result of collaboration with senior leaders. Such measures afforded CDOs the opportunity to make meaningful predictions about the outcomes associated with their efforts and proactively diagnose speed bumps and obstacles. In doing so, the CDO deployed a systemic approach.

Cautionary tales. The cautionary tales that CDOs offered reiterated themes that had been discovered previously via the data. More specifically, they concentrated on the prominence of culture and measurement. The primary picture that the data painted was one of preparation. The tales addressed the pre-work and preparation required to launch a successful campaign for workplace inclusion. Setting the stage, as respondents reported, included a far reaching check list of actionable items, from setting a vision to determining metrics and gaining executive support. The cautionary tales also reflected and recommended an integrative approach.

Key Findings

Global organizations have committed resources and attention to increasing the diversity of their workforce. Despite making these investments, many have yet to fully realize the benefits and anticipated outcomes of workplace inclusion. In addition, some organizations have assumed that diversity initiatives coupled with increased diverse representation automatically would result in inclusion. Many leaders have the inaccurate perception that just by their presence alone diverse employees are fully

engaged and feel included in their organizations. Belongingness and uniqueness are the predominant requirements of feeling included (Shore et al, 2011).

Culture eats strategy. Culture is the gatekeeper to inclusion. CDOs have to be adroit at assessing, evaluating, and transforming it in order to successfully achieve and sustain a workplace of inclusion. Therefore, the efficacy of their strategies rests on the foundation of culture. Since culture manifests in a three predominant levels—artifacts, values, and assumptions (Schein, 1985)—it is wise not to attempt the impossible task to boil the vast ocean of culture, but instead consider small and intentional interventions. These small, yet well placed and well embraced interventions can be the spark to lead to greater change. Culture is a double-edged sword. Time after time, the respondents referenced that culture can augment or obstruct the progress that the CDO seeks to achieve. Consequently, CDOs should seek to overlay on and align their strategies with the organization's culture. The finding that organizational culture, as identified in this study, is a key component of inclusion strategy aligns with the frameworks espoused by Cox (1994). His Interactional Model of Cultural Diversity, coupled with the works of Clayton (2010) and Jirincova (2013), reinforces the integral relationship among diversity, inclusion, and organizational culture.

The journey to inclusion is a marathon and not a sprint. Transforming organizational culture does not happen overnight. According to Kotter (2007), change usually takes a long time, especially when it involves a shift in how people think and behave. Therefore, the process of shifting has to be intentional and measured, which will require critical thinking, agility, and consistency. CDOs have to recognize that this is

a long play game that should be characterized by a series of interim victories.

Lappetito's (1994) work also aligns to the findings herein and speaks to the terms of execution for culture transformation, as well as the knowledge, tenacity, and thoughtful enactment required.

Assess and evaluate. Assessing signifies an attempt to objectively understand the state of a certain item. Conversely, evaluation addresses observing and measuring to determine the item's value or efficacy. CDOs should frequently do both because organizational assessments can help facilitate the organization's ability to validate its work. Kirkpatrick's evaluation framework provides applicable insights for CDOs to consider a comprehensive approach evaluation, comprising four levels:

1. Reaction
2. Learning
3. Behavior
4. Results (Rouse, 2011).

In summary and in alignment with the findings, Babcock (2006) contended that assessment should be complemented with metrics that signify the effectiveness of the diversity interventions and strategies.

Respect, dignity, and membership. When diverse employees have a sense of belonging to the work-group, it creates the level of affinity that CDOs seek to achieve. This sense of belonging is achieved when employees derive dignity from feeling respect and appreciation as a result of their uniqueness or difference. Figure 18 summarizes the corollary relationship between belonging and uniqueness to facilitate to inclusion, based on respect and dignity. The research of Begen and Turner-Cobb (2015) outlined in the

literature review supports the findings herein. Begen and Turner-Cobb (2015) concluded that increased belonging produces positive individual and organizational outcomes.

Inclusion Framework

	Low Belongingness	High Belongingness
Low Value in Uniqueness	<p>EXCLUSION</p> <ul style="list-style-type: none"> • Not respected or dignity afforded • Not treated as an organizational insider with unique value 	<p>ASSIMILATION</p> <ul style="list-style-type: none"> • Not respected or dignity afforded • Treated as an insider because they conform and modulate their identities
High Value in Uniqueness	<p>DIFFERENTIATION</p> <ul style="list-style-type: none"> • Respected & some dignity afforded • Not treated as an organizational insider, but their uniqueness is seen as valuable 	<p>INCLUSION</p> <ul style="list-style-type: none"> • Respected and dignity afforded • Treated as an insider & encouraged to retain their uniqueness

Figure 18. Inclusion framework. Adapted from “Inclusion and Diversity in Work Groups: A Review and Model for Future Research,” by L. M. Shore, A. E. Randel, B. G. Chung, M. A. Dean, K. H. Ehrhart, & R. Singh, 2010, *Journal of Management*, 37, p. 1266. Copyright 2010 by the authors.

Learning is both king and queen. CDOs consistently acknowledged the criticality of organizational learning. Argyris (1994) described organizational learning as a process of discovering and course correcting errors. Learning that creates awareness and changes behavior is a process, not an event. Training, in contrast, is an event. Organizations that have embraced establishing a culture of learning versus executing a series of training classes have come much closer to their mission of creating a workplace of inclusion. B. Kim (2006) theorized that developing a learning organization is a key strategy to D&I. In support of that theory, Senge (1990) asserted that a learning organization allows the organization the capacity to create and become what it wants to create.

Researcher's Observations

Several observations were noted during the course of conducting this study. All of the participants were transparent and very comfortable sharing their experiences. They appeared to be honest and were forthcoming in sharing their experiences. It was noted that the freely shared both those experiences that were positive, as well as those that were not. In sharing their experiences, there was an attempt on their part to reflect and extract learnings. On several occasions, participants paused to reflect before answering a question. In those instances, many times they adopted a retrospective perspective, conveying how they may have handled a situation differently now. This foretold of their individual desires to continuously learn and develop.

An additional observation was their collective involvement in community service organizations outside of their work responsibilities. Each of the 14 participants spoke of his/her extra-curricular activities in support of historically underrepresented groups. This was thought to connote their sincere commitment to the greater good of all.

A final observation concerned the participants' emotional intelligence. All 14 participants appeared to demonstrate the five elements of emotional intelligence (Greenspan, 1996):

1. Self aware, knowing their own strengths and weaknesses.
2. Self regulated, having an ability to display emotions in a controlled manner.
3. Motivated, to produce sustainable results.
4. Empathic, having the ability to understand the needs and desires of others.
5. Socially skilled, displayed by effective communication, listening and relationship building skills.

Given the findings of this research, it would seem that these attributes would be requirements for successful CDOs.

Implications of the Study

The implications of the study were considered against the backdrop of the theoretical framework. The theoretical framework for this research was based on social inclusion theory, which typically relates to various social and demographic groupings such as, race, gender, ethnicity, religion, sexual orientation, age, etc. A broader interpretation of social inclusion intersects with social justice ideology. From the lens of social justice, social inclusion centers on access and opportunity for all to fully participate with respect for their human dignity (Gidley, Hampson, Wheeler, & Bereded-Samuel, n.d.). In essence, social inclusion and social justice exemplify the “ability to participate in the key activities” (Saunders, Naidoo, & Griffiths, 2007, p. 17).

The literature review in Chapter 2 provided multiple perspectives from which to consider workplace inclusion, which framed the implications of the study. Starting first with definitions of diversity and inclusion, the literature review then explored multiple fields of study as a contextual framework. The approaches to the definition of diversity considered quality or characteristic-based elements, as well as social and interactional factors and social constructionism. The definition of inclusion related most directly to the employees’ perceptions of their unique contributions being appreciated (Mor Barak, 2015) and acceptance and treatment as an insider (Pelled et al, 1999). With these definitions as a foundation, the research considered three perspectives: anthropological, social, and psychological. The anthropological contributions posed by Dovidio et al. (2001) target the categorization of people into in-group and out-group. Van Willigen

(2002) applied anthropological constructs to assess and solve problems and Jordan (1995) suggested that workplaces are equivalent to cultures. The social perspective piggybacked on the concepts of in-groups and out-groups, the minimization of perceived similarities, and the exaggeration of perceived differences (J. Turner, 1985). Begen and Turner-Cobb (2015) concluded that enhancing belonging leads to adaptive physiological and psychological outcomes. Specifically, the literature provided conclusive evidence of the psychological and physical impact that exclusion can have (K. Williams, 2007). Finally, the review of literature assessed the organizational considerations of the role and responsibilities of the CDO and its relationship with and impact on the workplace. Given that the research purposed to understand the best practices associated with creating an inclusive workplace, the elements of the workplace specifically explored organizational culture, leadership engagement and compassion, and measurement, all of which were highlighted in the literature review. Figure 19 reflects the intersection of key elements of inclusion derived from the literature review and the CDO feedback.

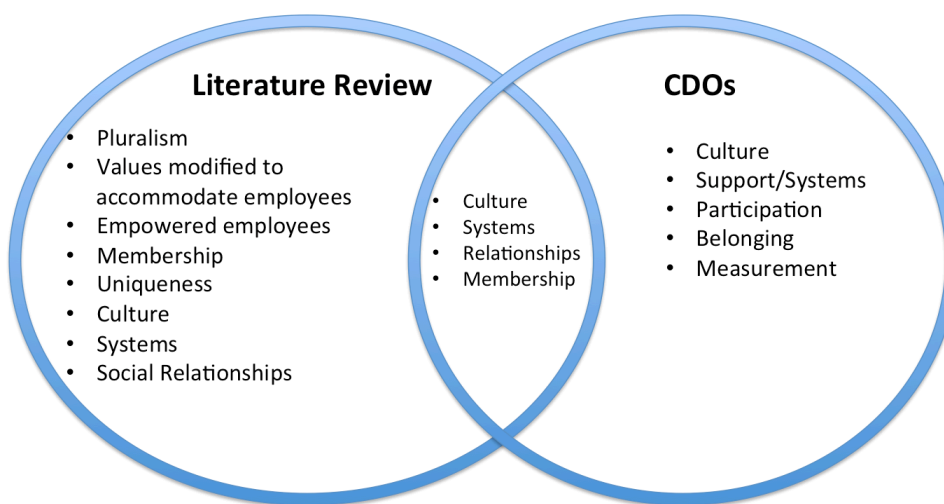


Figure 19. Individual and common elements from literature review and CDOs.

The complexities and nuances of these elements and the manner in which they manifest in the CDO's organization provided valuable insights regarding best practices and their implications for various groups.

The researcher also noted that an opportunity exists to expand the definition of inclusion to reflect a key element derived from the study. The findings of the study underscored the criticality of the diverse employees lived experience in cultures in which they perceived to be respected and had welcome opportunity for full membership. While the opportunity to participate is vital, the opportunity to do so in a dynamic and engaging culture appears to be key. Participation alone as a key attribute of the definition of inclusion does not seem sufficient. Participating and having membership in an attractive culture is the distinction. Full membership, in this regard means equity of access, equity of opportunity and equity of respect/cooperation.

Full membership, according to the findings in this study, is specifically the result of the alignment of leadership, organizational culture, systems/processes and employee experience. The researcher suggests that since culture plays such a requisite component, it must proactively and purposefully diagnosed, assessed and transformed. Such cultures would consider and embody inclusive practices prior to the employee's entry into the organization and throughout the employee lifecycle. To that end, key elements of the culture would:

- Be learning rich, affording all employees to evolve their awareness and further their development

- Be feedback and communication rich, in that productive dialogue regarding opportunities to enhance inclusion would be frequent and results oriented. As well, communication would be transparent.
- Include performance metrics and rewards predicated on leader's ability to attract, retain, develop, engage and promote diverse employees and not on increasing representation with no regard for the diverse employee's experience
- Afford appropriate resourcing to connote the value and importance of embedding and embracing diversity, in the broadest sense, into the organization
- Authentic advocacy and engagement on behalf of organizational leaders, coupled with a willingness to confront the brutal facts with the same rigor as any other business problem

In the introduction, it was noted that this study has potential significance for three groups: business leaders, human resources leaders, and CDOs. These three groups may benefit the most from this body of research. Each of these groups could derive knowledge that would further their respective agendas attendant to workplace inclusion.

Business leaders. Given the seismic shift that is occurring and will continue to occur in employee demographics and employee expectations, astute business leaders will want to be poised to respond to this shift and proactively create workplaces that allow for equity and opportunity. This study provides the foundational context for new business leaders who want to understand how to embed inclusive leadership and cultural practices at the launch of their business entity versus having to later unwind or

transform to the desired state. As business leaders are increasingly becoming more globally focused, van Willigen's (2002) application of anthropological constructs as a means to identify, assess, and problem solve will serve leaders' agendas well.

Chief Diversity Officers. It was intended that this study would provide a blueprint for future and current CDOs to navigate their journeys to inclusion in their service as "instruments of change" (Wilson, 2013, p. 435). In addition, the study outlines key elements derived from best practices that those in this space can consider. Hopefully, this study will also provides motivation and inspiration for them to continue their journeys, despite any challenges that they may encounter.

Human Resources leaders. Human Resources (HR) leaders are vital partners to CDOs. Chief HR Officers own the people programs that the CDOs have to leverage to accomplish the work of inclusion. The insights gleaned from the study will help provide common language and understanding of best practices to forge collaboration between these leaders.

The phenomenon under investigation in this study was the lived experiences of CDOs in the establishment of inclusive workplaces and the associated best practices for doing so. The findings herein add to the emerging body of research regarding the evolution of inclusion as a key lever to attract and engage diverse talent and provide greater context to increased understanding. Therefore, the opportunity to continue to further the body of knowledge in this arena is significant.

Recommendations for Future Research

As the next evolution of the workplace diversity continuum, inclusion is a relatively new construct. Therefore, a whole body of research has yet to be completed.

Specifically, outstanding research should address the elements of workplace inclusion and how to achieve it. This study, with its focus, on best practices scratches the surface of inclusion and inclusive practices. Further studies are recommended to continue to increase the body of knowledge regarding inclusive workplace practices to engage diverse employees. Paul Block, CEO of Mersant (as cited in Groysberg & Connolly, 2013), summed up perfectly the importance of making diversity and inclusion an organizational priority; “People with different lifestyles and different backgrounds challenge each other more. Diversity creates dissent, and you need that. Without it, you’re not going to get any deep inquiry or breakthroughs” (p. 14). To ensure greater breakthroughs, the following are recommended for future studies:

- More in-depth study that explores organizations’ best practices at various stages in their journey to inclusion. It would also be instructive to offer detailed steps and programs could be correlated to each stage in the journey.
- A study regarding the leadership styles of CDOs and their significance in the execution of their responsibilities. According to Dulewicz and Higgs (2005), there is a significant body of existing research regarding leadership styles and their impact on the organization. Given the relatively brief existence of the CDO role, it would be noteworthy to understand if certain styles were able to better achieve successful execution of inclusive workplaces.
- A study that reviews cultural transformation of workplace inclusion in comparison to other cultural transformations. This study proposed that workplace inclusion requires a system-based cultural transformation. It would be productive to compare cultural transformation associated with inclusion to

other types of transformation to ascertain commonalities, differences, and practical discernments.

- A study that addresses the best practices in creating and sustaining an inclusive workplace by industry. Given that organizations have discernible differences based on industry (Chatman & Jehn, 1994), it would be worthwhile to research if these differences impact the creation and sustaining of inclusion.
- A study that focuses on CDOs at various tenure points, as they evolve their skills and learning. Given the insights revealed by this study's participating CDOs and the evolution of their journeys, individually and organizationally, research that considers their skills and increased knowledge at key milestones could enhance the knowledge base of a peer.
- A study that explores the impact of the relationship between the CDO and CEO in developing an inclusive workplace. Insights provided in this study indicated that reporting relationship of the CDO could have impact goal attainment. Additionally, this study offered insights that C-level support is required for inclusion campaigns. Therefore, research that investigates the reporting relationship could be useful.
- A study that follows the launch of inclusive practices in an organization and provides phase-by-phase insights, in addition to proposing explicit activities, actions, responses, etc., for a CDO planning to embark on or already embarking on the same.

- A study that explores the leadership competencies of successful CDOs to identify profiles for future CDOs. An investigation with this focus would yield predictive analysis for potential candidates to serve as CDO.

Final Thoughts

From the beginning of this study, this investigator had a genuine desire to hear the CDOs' stories. It was relevant to better understand the successes that they had achieved and the practices that they employed to do so. This desire was admittedly heightened by the current headlines of global organizations' focus on increasing workplace diversity, and yet a seeming lack of focus on inclusion.

The current emphasis on increasing representation fails to consider a comprehensive systems approach. Focusing on an element here and an element there will not only fail to deliver the desired outcomes but also most certainly facilitate negative outcomes. With each unproductive step resulting from a myopic focus, the journey to inclusion is derailed and the destination farther away. A systems approach to creating a culture of inclusion addresses culture, notes informal and formal practices, establishes a shared definition of terms and the problems to solve, provokes self awareness and behavior change, rethinks processes and existing systems, engages leaders, embeds accountability, and most importantly, provides equity of access and opportunity, measures and predicts outcomes, and seeks and values the input of the diverse employees that they purpose to retain. Simply focusing on increasing the numbers will not achieve the goal of inclusion. To paraphrase the sentiments of Participant #7, diversity is about counting heads; however, inclusion is about making those heads count and feel counted.

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APPENDIX A

Recruitment Script

Hi. My name is Britta Wilson. I am a doctoral student in the Organizational Leadership program within the Graduate School of Education and Psychology at Pepperdine University. As part of fulfilling my degree requirements, I am conducting a study regarding the best practices to engage diversity and create an inclusive work environment.

I came across your name through your affiliation with the Conference Board's Global Diversity & Inclusion Council, of which I am also a member. As a result of your exemplary practices and contributions to your field, you have been carefully selected to participate. Participation in the study is voluntary and confidentiality will be maintained throughout the study. Participation entails a 60-minute interview, ideally in person or via phone. The questions that will be asked during the interview and an Informed Consent form will be sent to you in advance of scheduling the interview. Your participation in this study will be extremely valuable to other scholars, Chief Diversity Officers, HR and Diversity and Inclusion practitioners and business leaders in the engagement of diverse talent to create an inclusive work environment.

Are you willing to be interviewed as a part of this study?

Thank you,

APPENDIX B

Informed Consent

PEPPERDINE UNIVERSITY

INFORMED CONSENT FOR PARTICIPATION IN RESEARCH ACTIVITIES
--

ENGAGING DIVERSITY: BEST PRACTICES TO CREATE AN INCLUSIVE WORK ENVIRONMENT

You are invited to participate in a research study conducted by Britta M. Wilson, MBA, Principal Investigator and Farzin Madjidi, Ed.D, Faculty Advisor, at Pepperdine University, because:

- (a.) You are a Chief Diversity Officer (or equivalent),
- (b.) Have held the CDO position, equivalent to Director or above,
- (c.) Are or were employed by a global organization,
- (d.) Have been employed in the CDO post for at least a year in the same organization.

Your participation is voluntary. You should read the information below, and ask questions about anything that you do not understand, before deciding whether to participate. Please take as much time as you need to review the consent form. Given your role and/or level in the organization, it is suggested that discuss your participation with your employer and confirm that your participation does not conflict with any Non-Disclosure or Confidentiality Agreements.

You may also decide to discuss participation with your family or friends. If you decide to participate, you will be asked to sign this form. You will also be given a copy of this form for your records.

PURPOSE OF THE STUDY

The purpose of the study is to

- Determine the strategies employed and challenges faced by Chief Diversity Officers (CDOs) in creating an inclusive work environment for diverse employees.

- Determine what measures and recommendations CDOs would suggest to implement an inclusive workplace.
- Determine what recommendations CDOs provide to help others seeking to cultivate an inclusive work environment

STUDY PROCEDURES

If you volunteer to participate in this study, you will be asked to participate in an approximately 60 minute interview. The following interview protocol will be used:

BEST PRACTICES ASSOCIATED WITH CREATING AN INCLUSIVE WORKPLACE **Interview Protocol**

Icebreaker (a): Tell me about your career
Icebreaker (b): What prompted you to become involved in diversity and inclusion?

1. How do you define “inclusion”?
2. What are your best practices for promoting and facilitating inclusion of diverse employees?
3. What practices do you think hinder “inclusion”?
4. What resources did you need to recruit and retain diverse employees (assuming creating an inclusive work environment starts with talent acquisition)?
5. What were the major challenges and/or obstacles in creating an inclusive work environment?
6. How did you deal with and/or overcome those challenges?
7. What is the role of inclusion in your talent acquisition strategy?
8. Do you think that the characteristics of an inclusive work environment will change in the future?
9. How would you personally describe the elements of a successfully inclusive work environment?
10. How could these elements be measured and tracked to ensure a successfully inclusive work environment?
11. What measures does your leadership value in assessing the success of your inclusive practices?
12. What methods did you employ to benchmark and track inclusive workplace practices?
13. In what other way(s) is inclusion defined and measured differently at your organization?
14. What cautionary tale(s) would you share with executive leaders in the implementation of inclusive workplace practices?

POTENTIAL RISKS AND DISCOMFORTS

The potential risks associated with participation in this study include those associated with:

- a.) Professional Reputation - should their identification become known, the exposure of their thoughts and experiences could cause embarrassment or impact their professional standing;
- b.) Breach of Non Disclosure Agreement (NDA) or Confidentiality Agreements – given that CDOs are senior executives they are often privy to confidential business information necessitating them to sign NDAs and Confidentiality Agreements. Their responses could impact those Agreements;
- c.) Psychological Impact – given the possible sensitivity of the topic, the process of interviewing may elicit memories or experiences, which may cause emotional discomfort. Boredom, mental fatigue and frustration may also occur as a result of the interview questions asked.

These risks may be mitigated by allowing participants to:

- a.) Withdraw at any time without reason. Should the participant have second thoughts about their participation, feel that they may have “over-shared” or are uncomfortable with their participation they can withdraw.
- b.) Request and review their transcripts.

Further, risks will be reduced by strongly protecting confidentiality and using data collection processes so that it is difficult to link identifying info with participant responses.

DATA MAINTENANCE, ACCESS, STORAGE & DESTRUCTION

The security of data is an important component of research and insuring the confidentiality of the participants. The original signed Informed Consent form will be kept secured and separate from other data and files linking names and id numbers/pseudonyms.

All data that include personal identifiers or the identity of the participant could be deduced will be encrypted. Data that does not include personal identifiers will be maintained on password protected systems. Other data categories will be managed as outlined:

Data Type	Who Has Access	Where Stored?	How it will be Secured?	When Destroyed & How Destroyed
1. Creation of Codes a.) Pseudonyms b.) Real Identities	Researcher	2 Separate File Cabinets a.) Researchers Residence b.) Researcher's Office	Locked File Cabinets for a.) and b.)	a.) Destroyed after 3 years b.) Destroyed after transcription
2. Audio Tapes	Researcher & Transcriptionist	Laptop	Password Protected Laptop & Audio Files	Once transcribed; destroyed via commercial software applications & physical

				destruction
3. Electronic Records	Researcher	Laptop	Password Protected Laptop & Audio Files	3 years after the completion of research; destroyed via commercial software applications & physical destruction
4. Handwritten Notes	Researcher	File Cabinet in Researcher's Residence	Locked File	3 years after the completion of research; destroyed via shredding
5. Transcription	Researcher & Transcriptionist	Laptop	Password protected laptop & Word doc file	3 years after the completion of research
6. Codes & Coded Data	Researcher	I-Pad (Codes) Laptops (Coded Data) Stored separately	Password protected laptop & encrypted files	3 years after the completion of research

Any personal information that could identify you will be removed or changed before files are shared with the professional transcriptionist.

POTENTIAL BENEFITS TO PARTICIPANTS AND/OR TO SOCIETY

While there are no direct benefits to the study participants, there are several anticipated benefits to society which include:

1. The identification and compilation of the results of this study will be beneficial to CDOs, business leaders, Human Resources and diversity practitioners.
2. Findings in the study will provide insight and inform scholars and practitioners on best practices associated with the inclusion of diverse employees.

CONFIDENTIALITY

Based on your selection below, I will keep your records for this study confidential.

_____ (Please initial) I agree to permit the researcher to use my name, professional affiliation and the name of my organization. I understand that prior to submission of this research for publication; I will receive a copy of the manuscript and review it for two weeks. I may then request revisions to any quotes/information directly attributed to me. If the researcher cannot accommodate my request, the researcher will then delete my name, professional affiliation, name of my organization, and any other pertinent identifying information related to me and simply refer to me by a pseudonym and my organization as a "generic organization", e.g., Susan Smith, CDO of a global organization.

_____ (Please initial) I agree to permit the researchers to refer to me only by a pseudonym from a "generic organization." I understand my identity and the name of my organization will be kept confidential at all times and in all circumstances any research based on this interview is presented.

However, if I am required to do so by law, I may be required to disclose information collected about you. Pepperdine's University's Human Subjects Protection Program (HSPP) may also access the data collected. The HSPP occasionally reviews and monitors research studies to protect the rights and welfare of research subjects.

The data will be stored on a password-protected computer in the principal investigator's place of residence. The data will be stored for a minimum of three years and then destroyed. The audio recordings will be destroyed once transcribed.

PARTICIPATION AND WITHDRAWAL

Your participation is voluntary. Your refusal to participate will involve no penalty or loss of benefits to which you are otherwise entitled. You may withdraw your consent at any time and discontinue participation without penalty. You are not waiving any legal claims, rights or remedies because of your participation in this research study.

ALTERNATIVES TO FULL PARTICIPATION

The alternatives to participation in the study is not participating or completing only the items which you feel comfortable in doing so.

EMERGENCY CARE AND COMPENSATION FOR INJURY

If you are injured as a direct result of research procedures you will receive medical treatment; however, you or your insurance will be responsible for the cost. Pepperdine University does not provide any monetary compensation for injury.

INVESTIGATOR'S CONTACT INFORMATION

I understand that the investigator is willing to answer any inquiries I may have concerning the research herein described. I understand that I may contact:

Dr. Farzin Madjidi, or
Britta Wilson, if I have any other questions or concerns about this research.

If you have questions about your rights as a research participant, please contact:
Dr. Judy Ho, Chairperson, Graduate & Professional School Institutional Review Board (GPS IRB) at Pepperdine University.

RIGHTS OF RESEARCH PARTICIPANT – IRB CONTACT INFORMATION

If you have questions, concerns or complaints about your rights as a research participant or research in general please contact Dr. Judy Ho, Chairperson of the Graduate & Professional Schools Institutional Review Board at Pepperdine University
6100 Center Drive Suite 500
Los Angeles, CA 90045

APPENDIX C

IRB Approval



Pepperdine University
24255 Pacific Coast Highway
Malibu, CA 90263
TEL: 310-506-4000

NOTICE OF APPROVAL FOR HUMAN RESEARCH

Date: February 12, 2016

Protocol Investigator Name: Britta Wilson

Protocol #: 16-01-156

Project Title: ENGAGING DIVERSITY: BEST PRACTICES TO CREATE AN INCLUSIVE WORK ENVIRONMENT

School: Graduate School of Education and Psychology

Dear Britta Wilson:

Thank you for submitting your application for exempt review to Pepperdine University's Institutional Review Board (IRB). We appreciate the work you have done on your proposal. The IRB has reviewed your submitted IRB application and all ancillary materials. Upon review, the IRB has determined that the above entitled project meets the requirements for exemption under the federal regulations 45 CFR 46.101 that govern the protections of human subjects.

Your research must be conducted according to the proposal that was submitted to the IRB. If changes to the approved protocol occur, a revised protocol must be reviewed and approved by the IRB before implementation. For any proposed changes in your research protocol, please submit an amendment to the IRB. Since your study falls under exemption, there is no requirement for continuing IRB review of your project. Please be aware that changes to your protocol may prevent the research from qualifying for exemption from 45 CFR 46.101 and require submission of a new IRB application or other materials to the IRB.

A goal of the IRB is to prevent negative occurrences during any research study. However, despite the best intent, unforeseen circumstances or events may arise during the research. If an unexpected situation or adverse event happens during your investigation, please notify the IRB as soon as possible. We will ask for a complete written explanation of the event and your written response. Other actions also may be required depending on the nature of the event. Details regarding the timeframe in which adverse events must be reported to the IRB and documenting the adverse event can be found in the *Pepperdine University Protection of Human Participants in Research: Policies and Procedures Manual* at community.pepperdine.edu/irb.

Please refer to the protocol number denoted above in all communication or correspondence related to your application and this approval. Should you have additional questions or require clarification of the contents of this letter, please contact the IRB Office. On behalf of the IRB, I wish you success in this scholarly pursuit.

Sincerely,

Judy Ho, Ph.D., IRB Chairperson

cc: Dr. Lee Kats, Vice Provost for Research and Strategic Initiatives