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ORGANIZATIONAL ASSESSMENT OF

DIVERSITY AND INCLUSION

A Research Project

Presented to the Faculty of

The Graziadio Business School

School of Business and Management

Pepperdine University

In Partial Fulfillment

of the Requirements for the Degree

Master of Science

in

Organization Development

by

Lindsay Flaming Yeats

July 2018

This research project, completed by

LINDSAY FLAMING YEATS

under the guidance of the Faculty Committee and approved by its members, has been

submitted to and accepted by the faculty of The Graziadio Business School in partial

fulfillment of the requirements for the degree of

MASTER OF SCIENCE
IN ORGANIZATION DEVELOPMENT

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Faculty Committee

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Abstract

This study outlines the research methods and findings of an assessment performed to evaluate an organization's diversity and inclusion climate. A survey was conducted with 67 of 81 of the organization's employees, followed by 15 interviews, and six focus groups. The study found this organization to be very diverse and to place a high value on the importance of Diversity and Inclusion (D&I) to its performance. However, there are limited formal D&I structures currently in place. A comprehensive D&I management strategy integrated with the organization's business strategy will be critical to supporting achievement of its mission. This organization plays a unique role in bridging the gap between diverse student populations and more homogeneous tech corporations. Given this, the organization embodies the complexity of D&I challenges that many organizations must face in creating an inclusive culture in order to increase retention, job satisfaction, engagement, and performance.

Keywords: Diversity, Inclusion, Climate, Business Strategy

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Chapter 1:Introduction

For the past several decades practitioners and scholars have pursued evidence for the business case of diversity by seeking to show its benefits to organizational retention, job satisfaction, innovation, improved decision-making, organizational commitment, increased access to diversified clients, and firm reputation, among others (Mor et al., 2016). With complex nuance in the literature, scholars have landed on all sides of the topic. Some research demonstrates great benefits, while other findings show non-significant or mixed results. As such, practitioners and scholars alike have shifted their focus and attention beyond simply diversity to the importance of diversity management efforts (McKay & Avery, 2007). These most recent shifts aim at creating an organizational climate for inclusion necessary to foster creativity and job satisfaction, while also reducing more negative consequences such as miscommunication and mistrust (Mor et al., 2016). Inclusion takes diversity one-step further, emphasizing "organizational objectives designed to increase the participation of all employees and to leverage diversity effects on the organization" (Roberson, 2006, p. 228). With the literature increasingly showing a focus on diversity management strategies, organizations are shifting to develop comprehensive diversity management initiatives that align customized diversity and inclusion best practices to a given organizational context to maximize benefits and performance. As organizations continue to undergo this work, assessing diversity and inclusion climates and evaluating D&I management strategies will be highly relevant to maximizing organizational performance.

Purpose of the Research

This study examined the D&I climate of an organization, hence forth to be referred to as Confidential Organization Bay Area (COBA). Four research questions were explored:

1. What level of understanding do the leadership and staff of Confidential Organization Bay Area (COBA) have regarding diversity and inclusion and its benefits?

2. What are staff perceptions regarding the culture of diversity and inclusion at COBA?

3. How do staff perceive their own experiences of diversity and inclusion at COBA?

4. What opportunities exist to implement diversity and inclusion management strategies to maximize performance?

Research Setting

Currently, millions of young adults in the U.S. are facing social and economic injustice. Despite talent and motivation, they lack the access to higher education and careers that provide them with a living wage. Simultaneously, U.S. businesses are calling for more and better-trained talent to remain competitive on a global stage. In 2000, the first chapter of the national organization (CONat'l) was founded on the East Coast to address this need. The mission of CONat'l is to close the gap by providing lower-income young adults with the skills, experience, and support that will empower them to reach their potential through professional careers and higher education. CONat'l achieves this mission through a high support, high expectation model that combines marketable job skills, stipends, internships, and college credits. Their approach focuses on students' professional and personal development to place young adults on a path to economic self-sufficiency. Currently, CONat'l has a presence in regions and cities across the U.S.

In 2008, CONat'l began its Diversity and Cultural Competency Initiative to build a more diverse organization responsive to staff and student needs. Currently, the organization branch within the Bay Area (COBA) is comprised of approximately 90 staff located across three sites in San Francisco, Silicon Valley, and the East Bay. The organization works with young adults ages 18 – 24 years old providing an intensive one-year training program comprised of a combination of six months of technical skills classes and coursework eligible for college credit, followed by a six-month internship placement with a company within the Bay Area. To do so, COBA partners with widely recognized technology companies in the Silicon Valley.

Given the demographic diversity of COBA's staff and students, as well as the CONat'l focus on Diversity and Cultural Humility (D&CH), an emphasis on diversity and inclusion has been an espoused value of COBA since its inception in 2008. Historically, this has been demonstrated through various D&CH trainings during in-service staff days. Over the years other COBA initiatives have included the launch of a D&CH Committee led by volunteer staff, as well as various employee resource discussion groups initiated at the grass-roots level by staff. One of the most prominent groups still in existence today is the Black and African American Student Association (BAASA) formed to explore the unique retention challenges faced by Black and African American students, predominant of which are male program participants. Beyond that, in interviews and focus groups, many staff demonstrated a personal desire to pursue professional learning and development to increase their understanding of dynamics surrounding diversity and inclusion.

The decision to do an organizational assessment was catalyzed by several diversity breaches escalated by individual staff members to COBA senior leadership after experiencing disparaging comments about their gender identity. The timing seemed perfect to assess the diversity and inclusion climate across all three sites, with a specific focus on COBA's Senior Leadership Team. The request was to evaluate the current state to determine what opportunities exist to improve current D&I initiatives to maximize employee engagement and performance in more effectively pursuing the mission of COBA.

Significance of the Study

This study has implications for the value it will add to COBA's understanding of D&I, the benefits of D&I, and current practices that can be explored to leverage employee engagement and maximize performance. The study also has significance in further building upon the practice of developing a context-specific D&I management strategy within an organization. COBA's niche as a bridge spanning the divide between lower-income students and Fortune 500 companies places the organization in a unique position of straddling very different worlds. As such, COBA must employ diverse staff and leadership to provide structured support for students' professional and personal development, while also employing a business sales team to procure internships with traditionally homogenous tech companies of the Bay Area (often predominantly comprised of middle to upper class Caucasian males). The challenge of creating a diverse internship and hiring pipeline for these organizations is an opportunity to contribute innovative ideas and sustainable solutions for the field of diversity. Additional challenges around inclusion arise when students gain entry into these corporate environments.

Organizations can find themselves unaccustomed to creating a culture inclusive of diverse viewpoints, backgrounds, and experiences brought by COBA's interns.

As such, if COBA can foster an organizational culture that embodies innovative practices aimed at effectively bridging the gap between very diverse worlds, the implications are significant. The potential exists to further shape D&I theory and achieve greater sustainability within diversity and inclusion practices in corporate America.

Summary

In summary, this study assesses how to contextualize D&I theory and best practices through the implementation of a comprehensive D&I management strategy in order to effectively support COBA's organizational mission and business strategy. The ensuing chapters explore the overall topic of D&I further. Chapter 2 will expound upon the history of diversity and inclusion, definitions and terms, the literature and studies that have brought the field to where it is today, various best practices within D&I, and current assessments used to evaluate organizational D&I climate. Chapter 3 will explain the mixed methods study, outlining the quantitative and qualitative research methods for the assessment. Chapter 4 will present the findings and Chapter 5 will summarize recommendations and implications of the study.

Chapter 2: Literature Review

The purpose of this study is to perform a D&I assessment of COBA in order to identify opportunities to implement diversity management strategies to improve the organization's performance. This chapter presents a literature review which begins with a history of the field, defines Diversity and Inclusion as practiced today, examines the impact of D&I on organization performance, explores critical factors for consideration in launching a successful diversity and inclusion initiatives, and concludes by providing an overview of D&I assessments.

History of Diversity and Inclusion

A significant catalyst on the historical landscape of D&I was President Truman's passage of Executive Order No. 9981 in 1948 which established the President's Committee on Equality of Treatment and Opportunity in the Armed services. This order committed the government to desegregate the military. Following that, the Civil Rights Act of 1964 forbade discrimination on the basis of sex and race in hiring, promoting, and firing. Title VII of the act created the Equal Employment Opportunity Commission (EEOC) to implement the law (Civil Rights Act, 1964). Executive Order No. 11246 (1965) required government contractors to take affirmative actions to overcome past patterns of exclusion or discrimination (Kochan et al., 2003).

Anand and Winters (2008) outline five phases of diversity training that have occurred since the 1960s. Phase 1, during the 1960s and 1970s, was characterized by a focus on compliance. The Civil Rights Act, containing Title VII, produced an era of training resulting from the barrage of discrimination suits filed with the EEOC. Oftentimes in these suits, one of the remedies was a court ordered mandate for the

organization to train all employees in anti-discriminatory behavior. Many organizations, desiring to avoid costly, tarnishing lawsuits and negative publicity, voluntarily started implementing training. During this phase, training largely focused on imparting information surrounding legal requirements to managers and line-level employees. Unfortunately, trainings, which primarily focused on treating underrepresented minorities and women fairly and equitably, had limited resonance in White, male-dominated environments as non-members of these groups resented their exclusion and felt preferential treatment was afforded to targeted groups. IBM was one of the first companies to state that diversity was a moral imperative, adopting a social responsibility position (Ivancevich & Gilbert, 2000). It would be a full decade before companies considered the role of inclusive cultures to be key drivers for the success of diversity efforts.

Phase 2, initiated in the late 1970s and 1980s, was defined by assimilation (Anand & Winters, 2008). In the height of the Reagan era, deregulation policies shifted the focus on compliance and decentralized enforcement to organizations. With less federal scrutiny, many companies conducted training that was more likely to present content with the objective of helping women and people of color assimilate into corporate culture by creating special training programs. This strategy was based on the assumption that new corporate employees were less prepared due to the prevailing belief they were less qualified due to not having developed the necessary managerial skills. In contrast, Dr. Jeff Howard designed programs based on Bandura's (1997) concept of self-efficacy, which theorized that people's beliefs about their capabilities result in performance which influences events that impact their lives. Howard designed programs for minorities and

women based on the assumption that they lacked the self-confidence to demonstrate their talents in different, sometimes unwelcoming, environments (Olson, 1993).

Phase 3, started during the late 1980s and was the period in which the diversity field was born (Anand & Winters, 2008). In 1987, the publication *Workforce 2000* created a shift in thinking about the future composition of the workforce. The publication was actually misinterpreted to indicate that there would be a total (rather than marginal) change in ethnic and gender diversity in the workforce. Nonetheless, *Workforce 2000* is credited with introducing the term "workforce diversity," and served as a pivotal catalyst in creating an important rationale for the diversity industry (Ivancevich & Gilbert, 2000). Even with affirmative action, the progress of increasing the number of women and minorities in the workforce had been slow. While recruiting underrepresented groups posed a significant challenge, retaining women and minorities continued to be an even greater problem. From 1965 to 1988, the corporate sector paid little attention to how having different backgrounds would impact the ability of the dominant group and the "new minority" groups to work together effectively. The unwritten expectation was that the new entrants would conform to the dominant group. Three years after the release of *Workforce 2000*, Thomas (1990) shifted the paradigm of diversity from compliance to business survival. Thomas (1990) argued that recruitment was not the central problem, but instead, it was the more the reality that careers of minorities and women plateau as few were breaking into higher-level positions:

> Affirmative action had an essential role to play and played it very
> well. In many companies and communities, it still plays that role.
> But affirmative action is an artificial, transitional intervention
> intended to give managers a chance to correct an imbalance, an
> injustice, and a mistake. Once the numbers mistake has been
> corrected, I don't think affirmative action alone can cope with the

remaining long-term task of creating a work setting geared to the upward mobility of all kinds of people, including white males (p. 108).

Thomas (1990) introduced the idea that goals should be used to create an environment "where we is everyone." That something besides affirmative action must enable people to perform to their potential. This new paradigm was to be called managing diversity and it paved the way for the next iteration of diversity training.

Phase 4, spanning from the late 1980s to the late 1990s, brought with it the shift from focusing on women and racial, ethnic minorities to incorporating everyone, including White men, under the umbrella of diversity. The focus was to make everyone aware and sensitive to the needs and differences of others (Anand & Winters, 2008). Initially, White men were not viewed as having valid issues about their place in a new diverse workplace but were primarily viewed as the problem and in need of "fixing." There remained a greater focus on race and gender, with little emphasis and attention on issues such as sexual orientation, age, and disability. During this phase, no consensus model emerged among experts and practitioners, which resulted in a spectrum of training with a range of focus, from social justice (emphasizing adversities that historically underrepresented groups faced in corporate settings) to sensitivity and awareness that was deemed to be "watered down." During this era, Cox (1991) conceptualized three types of organizations: monolithic, plural, and multicultural. Cox (1991) defined the monolithic organization as homogeneous, with the majority creating and maintaining organizational norms. The pluralistic organization was more heterogeneous and more inclusive than the monolithic but continued the expectation of assimilation for minority groups. The multicultural organization, however, was not only heterogeneous but valued the diversity

amongst employees (Cox, 1991). With little internal expertise during this era, many Fortune-500 companies hired diversity firms to train all employees. While some diversity training programs were well designed, they faced cost constraints of 100,000+ employees and content was sometimes squeezed into short timeframes or facilitated by internal trainers who lacked subject matter expertise. This led to the failure of participants to grasp the complexity and controversial nature of topics presented (Anand & Winters, 2008). Conversely, some participants left feeling confused, angry, and with greater animosity towards differences. With little formal follow-up, employees were left on their own to sort out meaning and interpretation of the learning. As a result, by the end of the 1990s practitioners were more likely to understand that diversity could not be relegated to a program, but rather that it had to be viewed as an ongoing business process, like quality, and become integrated into the core strategy of the organization (Anand & Winters, 2008).

Phase 5, in more recent paradigms for diversity training there has been a shift from viewing diversity training as tangential to core business issues to being considered a best practice in achieving business success, profitability, and growth. Factors such as rapidly changing employee and customer demographics, globalization, and shortages of technically trained workers created fierce competition in hiring talent. This necessitated companies going beyond awareness of difference to developing inclusive organizations and diversity-competent leaders. Positioning diversity as a competency has created another paradigm shift. The assumption is no longer that certain groups need training (e.g., White men or minorities), but rather that all employees need to be cross-culturally competent in an increasingly global world (Anand & Winters, 2008). These shifts have

resulted in a much more integrated, ongoing approach that has moved beyond classroom

approach to require more holistic strategy and management.

Definitions: Diversity and Inclusion

For the purpose of this study it is essential to define diversity and inclusion, as

well as to take a closer look at diversity management. Roberson (2006) referred to

diversity as the demographic composition of groups or organizations. Diversity can be

visible (e.g., race, gender, age) or invisible (e.g., sexual orientation, education, socio-

economic status). Mor Barak et al. (1998) are careful to point out that diversity is not

simply about anthropological differences among individuals that differentiate them. More

fully, diversity is about belonging to groups that are different than whatever is considered

mainstream in society. These divisions, or categories, have potential for harmful or

beneficial impact on job opportunities, treatment in the workplace, and promotion

prospects irrespective of job-related skills and qualifications (Mor Barak, 2015).   In

addition to diversity, diversity climate is defined as employee perceptions that an

organization adheres to fair personnel practices and the degree that minority employees

are integrated into the work environment (Mor Barak et al., 1998).

Roberson (2006) defines inclusion as employee involvement and "integration of

diversity into organization systems and processes" (p. 228). Inclusion takes diversity one-

step further by emphasizing an active role in decision-making processes to increase the

participation of all employees and to leverage diversity effects on the organization

(Roberson, 2006). Inclusion has been used to describe worker participation and

empowerment. More practically, inclusion is the extent to which individuals can access

an organization's information and resources, are involved in work groups, and can

influence decision-making processes (Mor Barak et al., 1998). Inclusion in informal processes, such as "water cooler" and lunch meetings where information exchange and decisions informally take place, is also significant (Mor Barak et al., 2014). To feel included in a workgroup, an individual must have two complementing needs satisfied: belongingness and uniqueness (Shore et al., 2011). Fostering a sense of belonging is critical, but if the cost is that employees have to give up their unique characteristics, then true inclusion is not being experienced. For example, An African American manager who is not recognized for her unique characteristics and is expected to act like any other manager in the organization might experience belongingness, but her uniqueness would not be recognized. On the other hand, if an employee is appreciated for his uniqueness, for example, an older employee who is respected for his experience and expertise, but is not invited to participate in meetings or social activities, then his need for uniqueness is satisfied, but not his need for belongingness (Shore et al., 2011). Brimball, Lizano and Mor Barak (2014) take inclusion a step further by depicting an organization that not only accepts and utilizes the diversity of its own workforce, but is also active in the community through participation in state and federal programs to include population groups such as immigrants, women, and the working poor.

Olsen and Martins (2012) define diversity management as the utilization of human resource management practices to 1) increase or maintain the variation in human capital, and/or 2) ensure that variation in human capital does not hinder the achievement of organizational objectives, and/or 3) ensure that variation in human capital facilitates the achievement of organizational objectives. Common perspectives on managing diversity focus on targeted recruitment initiatives, education and training, career

development, and mentoring programs to increase and retain workforce heterogeneity in organizations (Cox, 1994). Beyond this, some organizations have begun to rely on a broader set of programs and initiatives including employee participation, communication strategies, and community relations (Wentling & Palma-Rivas, 2000), which emphasize the removal of barriers that block employees from using the full range of their skills and competencies in organization (Roberson, 2006).

In conclusion, many organizations have become more diverse, but not all are inclusive. Organizations can falsely assume that any diversity initiative automatically results in inclusion (Thomas, Ny, & Dawson, 2010). Just because an organization displays diversity in its employee makeup, does not guarantee that its structures, policies, and processes are conducive to inclusion, nor does it necessarily translate to a culture where diverse employees experience a sense of belonging and value.

Impact on Organization Performance

Historically, scholars have disagreed about the overall impact of diversity within organizations (Gonzalez & DeNisi, 2009). Cox (1991) found that diversity created the potential for both substantial benefits (better decision-making, greater creativity, and innovation) and costs (higher turnover, interpersonal conflict, and communication breakdowns). Cox (1991) stated that "To capitalize on the benefits and minimize the costs of worker diversity, organizations… must become 'multicultural.' This term refers to the degree to which an organization values cultural diversity and is willing to utilize and encourage it" (p. 34). Mor Barak (2017) confirms the complex landscape in the research linking diversity and inclusion to increased performance. Empirical studies have historically lent support to both the notion that organization diversity results in

advantageous outcomes, as well as mixed results that leave the benefits of diversity in question.

Management practitioners and scholars have been interested in understanding the beneficial impacts of diversity on organizational outcomes for years. In their study on diversity climate, Gonzalez and DeNisi (2009) found greater creativity, innovation, and problems-solving ability in contexts with a positive diversity climate. Giffords (2009) cites increased organizational commitment, resulting in outcomes such as lower absenteeism, loyalty to the organization, and the degree to which employees will exert greater effort on behalf of the organization. Groeneveld (2011) found that increased retention is another benefit, though it is important to note that awareness of the needs and values of various groups should be factored into creating policies adaptable enough to be inclusive. Diversity and perceived inclusion has also been found significant in predicting job satisfaction, specifically as it relates to supervisory support (Acquavita, Pittman, Gibbons, & Castellanos-Brown, 2009). In considering competitive advantage related to external factors, Miller and del Carmen Traina (2009) found a positive relationship between diversity and both firm reputation and innovation. Cox (1991) noted the benefit of success in an organization's marketing and capability to relate to different types of customers. The importance of businesses being like their customer base allows for greater understanding and communication in terms that reflect the customers own concerns (Armstrong et al., 2010).

More recently, the McKinsey Organization's research shows that gender-diverse companies are 15% more likely to outperform their peers financially, and ethnically-diverse companies are 35% more likely to do the same (Hunt, Layton, Prince, 2015).

Great Place to Work's report on *The Best Workplaces for Diversity* found that the Best

Workplaces experienced average revenue gains of 24% higher than their peer companies

(Frauenheim & Lewis-Kulin, 2016). Both studies note that correlation is not causation

and that greater diversity headcount does not automatically translate to more profit.

However, companies that commit themselves to the management of diversity and

inclusion demonstrate greater financial performance (Frauenheim & Lewis-Kulin, 2016).

In the U.S., for every 10% increase in racial and ethnic diversity on the senior executive

team, earnings before interest and taxes (EBIT) are 0.80% higher (Hunt, Layton, and

Prince, 2015).

Conversely, Mor Barak et al. (2016) cites studies that found non-significant or

mixed results surrounding the benefits of diversity in organizations (Choi & Rainey,

2010; Faller, Grabarek & Ortega, 2010; Mamman, Kamoche, & Bakuwa, 2012; Van

Knippenberg & Schippers, 2007). These include lack of retention, lost revenues,

increased inter-unit conflict, and lack of cooperation (Gonzalez & DeNisi, 2009;

Mamman et al., 2012; Sacco and Schmidt, 2005; Spataro, 2005). Mistrust and

miscommunication are further potentially negative consequences of diversity (Mor Barak

et al., 2016).

As seemingly contradictory research in the field of diversity and inclusion has

been generated, the focus has shifted to a more nuanced understanding (Kochan et al.,

2003). In order to fully realize the benefits of diversity in organizations, the focus must

shift to diversity management (Mor Barak et al., 2016). Diversity management refers to

"the voluntary organizational actions that are designed to create greater inclusion of

employees from various backgrounds into the formal and informal organizational

structures through deliberate policies and programs" (Mor Barak, 2017, p. 5294). These policies and programs are designed to enhance recruitment, inclusion, promotion, and retention of employees different from the majority of the organization's workforce (Kossek & Lobel, 1996; Ozbilgin & Tatli, 2008). Kochan et al. (2003) found that training programs improve the skills of managers and team members, which might be somewhat useful, but not likely enough to be sufficient. Organizations must also implement more comprehensive diversity and inclusion management strategies to create cultures of mutual learning and cooperation.

Current evidence suggests that leaders appreciate the need for attention to the organizational diversity climate. At the beginning of the 21st century, approximately 75% of Fortune 500 had diversity programs (Kalev et al., 2006). Knight and Omanovic (2016) argue that diversity management strategies which neglect addressing issues of identity, intersectionality and the changing socio-economic context of diversity, a well-meaning D&I program can obscure disadvantages of minorities within organizations. Many organizations struggle with the challenge of how to operationalize diversity management. McKay et al. (2007) proposed that the juxtaposition of organization's ability to attract, yet not retain, diverse talent stems from the gap between companies' development of effective recruiting strategies and their lesser success in altering their diversity climates.

Critical Factors in Successful Diversity and Inclusion Management Strategies

To ensure the success of a long-term diversity and inclusion management, several factors are critical. This section outlines and summarizes several of these.

Policies and Programs. To create a foundation, infrastructure and policies must be in place, or implemented. This includes a range of diversity practices such a diversity

and inclusion policy statements, active recruitment, and compensation (Ng, 2008). It also requires embedding diversity and inclusion into hiring, performance management, succession management, leadership development, learning, and holding leaders accountable for inclusive behavior and diversity results (Bersin, 2015).

Executive (CEO) Buy-In. Successful diversity and inclusion programs are a top-to-bottom business strategy, not just an HR program (Bersin, 2015). Executive buy-in, specifically CEO commitment, is important to success and sustainability of any diversity and inclusion initiative. Without CEO commitment, institutional and environmental factors (e.g., legislation) are limited in their impact of promoting diversity (Ng, 2008). In addition to CEO buy-in, assigning a top executive the responsibility for leading and sponsoring the inclusion and diversity strategy is critical (Bersin, 2015).

Tied to Business Strategy: Organizations are increasingly pursuing diversity and inclusion management, but often do so only when business objectives coincide with the needs of minority groups (Wentling & Palma-Rivas, 1998). That said, for sustainability, it is also important that diversity and inclusion be a critical component of a firm's business strategy (Kepinski & Hucke, 2017). Mor Barak (2017) describes effective diversity management as a four-stage process that organizations should consider:

1. Performing self-study, or an assessment, of their diversity climate and climate for inclusion

2. Developing a strategic plan of action relevant to the organization's mission and goals

3. Implementing the plan through taking actions, and corrective actions, to address conflicts, dilemmas, or gaps

4. Gathering feedback through gathering information regarding the strategy to increase diversity and inclusion at all organizational levels.

Focus on Intersectionality. An important factor in successful D&I initiatives is an awareness that it is about more than race and gender (Knight & Omanovic, 2016). There is growing focus on creating environments where a variety of different voices are encouraged and heard. Thomas, Tran, and Dawson (2010) proposed that rather than focusing on differences that distill diversity to one-dimensional factors such as race, gender, and sexual orientation, it is critical to look at diversity through an intersectional lens containing multiple dimensions. This promotes multicultural competence and inclusion while minimizing resistance. The practicality of this approach highlights nuances of similarity, rather than oversimplifying differences by using dialogue to reject the tendency to talk about specific demographic groups as separate entities, and instead uses cross-cutting issues such as privilege to discuss how groups share the experience of being afforded, as well as denied, privilege (Thomas, Ny, & Dawson, 2010).

Measurement and Metrics. D&I management strategies must incorporate data-driven measurement for leadership and management accountability (Ng, 2008). Creating internally and externally visible metrics to measure progress in all areas, such as recruiting, promotion rates, compensation levels, turnover, and supplier diversity is critical to success and sustainability (Bersin, 2015).

D&I Assessments

Across the board, the literature increasingly confirms the value of tailoring the diversity management strategy to the organization's context. Scholars have developed several assessments of diversity and inclusion over the past few decades. Mor Barak et al. (1998) developed the Diversity Climate Perceptions Scale (DC) to assess fairness and inclusiveness with respect to diversity in organizations. Various dimensions of the

assessment focus on issues pertaining to equality of treatment, as well as to the fairness of human resource policies and practices concerning gender, ethnicity, race, and age. The organizational inclusiveness subscale addresses topics such as organizational support of diversity networks, mentoring programs, and adequacy of training programs.

Chrobot-Mason (2003) developed the Diversity Promises scale (DP) to measure the extent to which an organization honors promises regarding the diversity climate for employees of color. This scale measures respondents' perceptions that organizational promises have been honored with respect to diverse workforce representation, elimination of bias, appreciation of input from minority group members, and support for unique minority group issues. Chrobot-Mason (2003) also measured the extent to which respondents valued each dimension of diversity climate.

While Chrobot-Mason's (2003) Diversity Promise scale addresses broader diversity climate issues, Mor Barak et al.'s (1998) scale asks about more direct treatment by the employee's direct supervisor. Though both assessments measure diversity climate, the two scales measure distinct dimensions of the organizational environment.

Buttner et al.'s (2012) comparison of the two assessments found that paying attention to the more proximal aspects of perceptions around the diversity climate and those human resource decisions that directly affect minority groups, such as fair treatment in hiring, promotion, feedback, and performance evaluation, are more important than diversity promises made at the organizational level. Enhancing unit level managers' awareness about the importance of fair treatment as well as fostering employee awareness about how decisions are made may be particularly relevant.

Dahm, Graves, and Invancevich. (2009) developed the Organizational Diversity Needs Analysis (ODNA). The ODNA was designed for the purpose of customizing diversity and inclusion awareness and skills training design. It identifies gaps in skills and competencies that should be addressed. Beyond that, the instrument yields baseline information to measure and monitor change at many levels within the organization's structure. The dimensions of the study were: 1) Organizational inclusion/exclusion, 2) Cultural group inclusion and exclusion (measuring an individual's personal identification with the group and the degree of marginalization experienced, 3) Valuing differences (measuring the attitude an employee has of valuing diversity), 4) Workload (an employee's attitude about their workload can impact their attitude toward the organization in general and their treatment of others), 5) Affirmative-action group perceptions (provides insight into the particular phenomena experienced as a result of traditional organizational initiatives aimed at compliance with affirmative-action requirements), 6) Trust (personal feelings of loyalty that may supersede valuing differences), 7) Adaptation (the need to adjust or adapt behavior in order to interact effectively with others from other groups), 8) Sensitivity and Flexibility (the inclination to be more flexible and sensitive to the needs of others).

Summary

The goal of this chapter was to review the history of diversity and inclusion, to define terminology around diversity, inclusion, and diversity management, to look at the impact of diversity and inclusion on organizational performance, to identify critical factors necessary for an effective and sustainable diversity and inclusion management

strategy, and to explore various diversity and inclusion instruments used to assess organization diversity and inclusion climates.

In conclusion, diversity and inclusion are both complex and nuanced. Organizations can be diverse in their demographics, but that does not automatically translate to inclusiveness. Conversely, organizations can be very inclusive, but very homogenous in their make-up. Furthermore, the literature provides mixed reviews on the costs and benefits of the impact of diversity on organizational performance. Within this, a consistent finding across the board remains that to create a healthy diversity and inclusion climate, a comprehensive D&I management strategy must be implemented. This strategy must be holistic and intersectional in nature, have a sound infrastructure of policies, procedures, and programs, be supported through ongoing sponsorship of influential executives and the buy-in of the CEO, be integrated in the overall business strategy, and be rooted in metrics and ongoing measurement to drive corporate accountability and improvement.

Chapter 3: Methods

The purpose of this action research project is to perform a D&I assessment of COBA and develop a customized diversity management strategy. The research questions this study examines include:

1. What level of understanding do the leadership and staff of Confidential Organization Bay Area (COBA) have regarding diversity and inclusion and its benefits?

2. What are employee perceptions regarding the culture of diversity and inclusion at COBA?

3. How do employees perceive their own experiences of diversity and inclusion at COBA?

4. What opportunities exist to implement diversity and inclusion management strategies to maximize performance?

This chapter describes the study design, the sample, instrumentation used, data collection, and an overview of the data analysis.

Research Design

This study used a mixed method design by combining both quantitative and qualitative forms of research (Creswell, 2014). The study was comprised of a quantitative survey as well as qualitative interview and focus groups. Data was collected in two phases: 1) An online, confidential survey of all levels of the organization, 2) Individual interviews and focus groups. Using a mixed method design allowed for an integrated approach to data analysis as the survey results were used to determine interview and focus group questions (Creswell, 2014). The qualitative data served to shed further light on the underlying root causes for trends found through the survey.

Sample

81 COBA employees across the three Bay Area sites were invited to participate in the D&I assessment. The survey was distributed evenly to all levels of leadership across the organization:

1. Senior Leadership Team

2. Functional Lead Mid-Level Management

3. Staff

The survey asked participants to complete confidential demographic questions to obtain data on their role within the organization, gender, race and ethnicity, age, ability, sexual orientation, and education level.

For the interviews, a stratified sample of 15 participants were chosen to participate. Interviews were conducted predominantly with the Senior Leadership Team and Functional Leads. Beyond that, several individual interviews were conducted with staff level employees.

In addition to interviews, six focus groups were completed, to represent each of the following sample subgroups:

1. East Bay Site Staff

2. San Francisco Site Caucasian Staff

3. San Francisco Site Staff of Color

4. San Francisco Site LGBTQ+ Staff

5. Silicon Valley Site Caucasian Staff

6. Silicon Valley Site Staff of Color

The focus groups were designed to be as homogenous as possible to isolate variables and to maximize the potential for safety of open and honesty dialogue.

A total of 67 participants completed the survey. Table 1 illustrates the demographic breakdown of survey participation.

Table 1

COBA Survey Participant Demographics

Site Location		Leadership		Race/Ethnicity		Gender		Sexual Orientation		Age		Disability		Education	
San Francisco Site	38	Senior Leadership Team	6	Non-Hispanic White	20	Male	24	Heterosexual	48	18-21 yrs	2	Sensory Impairment	0	Less than HS Diploma	0
Silicon Valley Site	22	Functional Leads	7	Black, AA, Afro-Caribean	13	Female	37	Gay or Lesbian	6	22-40 yrs	48	Mobility Impairment	0	High School Diploma	0
East Bay Site	7	Staff	54	Latino or Hispanic American	10	Trans Male	0	Bisexual	4	41-52 yrs	6	Learning Disability	2	Some College, No Degree	7
				East Asian or AA	8	Trans Female	0	Other	3	53-71 yrs	3	Mental Health	5	Associate Degree	0
				South Asian or Indian American	0	Genderqueer/ Gender Non-Conforming	3	Prefer to Not Answer	6	72+ yrs	0	Not Applicable	58	Bachelor's Degree	33
				Middle Eastern or Arab American	1	Different Identity	0			Prefer to Not Answer	8	Prefer to Not Answer	2	Masters Degree	24
				Native American or Alaskan Native	0	Prefer to Not Answer	3							Doctorate	1
				Mixed: White & Asisan American	2									Prefer to Not Answer	2
				Mixed: White & Latino or Hispanic	2										
				Mixed: White & Black or African American	2										
				Mixed: Combination	1										
				Other	3										
				Prefer to Not Answer	5										
Total	67	Total	67	Total	67	Total	67	Total	67	Total	67	Total	67	Total	67

A total of 15 employees participated in the interviews. Table 2 illustrates the demographic breakdown of interview participants.

Table 2

COBA Interview Participant Demographics

Site Location		Leadership		Race/Ethnicity		Gender		Sexual Orientation		Age		Disability		Education	
San Francisco Site	10	Senior Leadership Team	4	Non-Hispanic White	2	Male	3	Heterosexual	9	18-21 yrs	0	Sensory Impairment	0	Less than HS Diploma	0
Silicon Valley Site	3	Functional Leads	4	Black, AA, Afro-Caribean	6	Female	10	Gay or Lesbian	1	22-40 yrs	12	Mobility Impairment	0	High School Diploma	0
East Bay Site	2	Staff	7	Latino or Hispanic American	3	Trans Male	0	Bisexual	2	41-52 yrs	1	Learning Disability	0	Some College, No Degree	1
				East Asian or AA	1	Trans Female	0	Other	1	53-71 yrs	1	Mental Health	4	Associate Degree	0
				South Asian or Indian American	0	Genderqueer/Gender Non-Conforming	1	Prefer to Not Answer	2	72+ yrs	0	Not Applicable	10	Bachelor's Degree	6
				Middle Eastern or Arab American	0	Different Identity	0			Prefer to Not Answer	1	Prefer to Not Answer	1	Masters Degree	8
				Native American or Alaskan Native	0	Prefer to Not Answer	1							Doctorate	0
				Mixed: White & Asisan American	0									Prefer to Not Answer	0
				Mixed: White & Latino or Hispanic	0										
				Mixed: White & Black or African American	0										
				Mixed: Combination	0										
				Other	0										
				Prefer to Not Answer	3										
Total	15	Total	15	Total	15	Total	15	Total	15	Total	15	Total	15	Total	15

A total of 24 employees participated in six focus groups. Table 3 illustrates the demographic breakdown of focus group participants. One focus group participant did not complete the survey; therefore demographic data is not available. As such, data in table below is reflective of 23 of 24 focus group participants.

Table 3

COBA Focus Group Participant Demographics

Site Location		Leadership		Race/Ethnicity		Gender		Sexual Orientation		Age		Disability		Education	
San Francisco Site	13	Senior Leadership Team	0	Non-Hispanic White	10	Male	7	Heterosexual	16	18-21 yrs	0	Sensory Impairment	0	Less than HS Diploma	0
Silicon Valley Site	6	Functional Leads	0	Black, AA, Afro-Caribbean	3	Female	13	Gay or Lesbian	2	22-40 yrs	17	Mobility Impairment	0	High School Diploma	0
East Bay Site	4	Staff	23	Latino or Hispanic American	3	Trans Male	0	Bisexual	2	41-52 yrs	2	Learning Disability	2	Some College, No Degree	1
				East Asian or AA	5	Trans Female	0	Other	1	53-71 yrs	1	Mental Health	1	Associate Degree	0
				South Asian or Indian American	0	Genderqueer/ Gender Non-Conforming	2	Prefer to Not Answer	2	72+ yrs	0	Not Applicable	20	Bachelor's Degree	13
				Middle Eastern or Arab American	0	Different Identity	0			Prefer to Not Answer	3	Prefer to Not Answer	0	Masters Degree	9
				Native American or Alaskan Native	0	Prefer to Not Answer	1							Doctorate	0
				Mixed: White & Asisan American	1									Prefer to Not Answer	0
				Mixed: White & Latino or Hispanic	1										
				Mixed: White & Black or African American	0										
				Mixed: Combination	0										
				Other	0										
				Prefer to Not Answer	0										
Total	23	Total	23	Total	23	Total	23	Total	23	Total	23	Total	23	Total	23

Instrumentation

Data was collected via a survey instrument combining two scales to measure the diversity and inclusion climate of the organization, a post-survey interview, and post-survey focus group questions. The following sections describe the design of these instruments.

Survey. The purpose of the survey was to assess participants' perception of the diversity and inclusion climate of the study organization. As such, the Mor Barak Inclusion-Exclusion (MBIE) Scale and the Diversity Climate Scale were used for a total

of 31 questions (see Appendix A). The survey was designed to be completed online in 20-30 minutes.

MBIE Scale. The Mor Barak (2017) inclusion-exclusion scale measures the degree to which individuals feel part of critical organizational processes such as access to information, involvement and participation with the organization, and influence in the decision-making process. The measure includes 15 items and uses a matrix of five work-organization system levels that evaluate a worker's sense of inclusion: Work Group, Organization Supervisor, Higher Management, and Social/Informal. In each of these levels, the respondent is asked to assess his or her inclusion on a Likert Scale with a range from 1 (Strongly Disagree) – 6 (Strongly Agree). Individuals are measured according to three dimensions defined as follows:

1. Decision Making Process - Refers to the level of influence the individual has with their workgroup, their supervisor and in the organization, both formally and in social settings.

2. Information Networks - Refers to the level of access to information the individual has, through information shared by colleagues, supervisors, and upper level management.

3. Team Member Participation and Involvement - Refers to the degree the individual is typically invited to participate in team related activities or important organizational meetings with supervisors or upper management.

Diversity Climate Scale. The diversity climate scale examines participant's views about the diversity climate within an organization. The measure focuses on employee perceptions, as research shows that behavior in the workplace is driven by perceptions of reality (Mor Barak et al., 2014). What people believe is of vital importance, whether or not their beliefs are consistent with reality. The scale includes 16-items with two dimensions:

1. <u>Organizational Dimension</u> – Refers to the perception of management's policies and procedures that affect members of minority groups and women across two factors:

    a. <u>Organizational Fairness Factor</u> – Such as preferential treatment in hiring or promotion

    b. <u>Organizational Inclusion Factor</u> – Such as mentorship and preservation of the "old boys network"

2. <u>Personal Dimension</u> – Refers to individuals' views across two factors:

    c. <u>Personal Diversity Value Factor</u> – Importance of diversity to work groups and the organization

    d. <u>Personal Comfort with Diversity</u> – Level of comfort in interactions with members of other groups

Interviews

The purpose of the interviews was to gain a deeper, more in-depth understanding of some of the reasons and potential root causes underlying data trends uncovered in the survey process. This was to gain a more nuanced grasp of participants perception of the organization's diversity and inclusion climate.

Interviews were conducted with 15 participants starting several weeks after the completion of the survey. The interview began with describing the study purpose, the nature of participation, and confidentiality and consent procedures. See Appendix B for a full list of interview questions.

Focus Groups

The purpose of conducting focus groups is to get additional staff level feedback across all three sites regarding underlying reasons for data trends from the quantitative survey (Creswell, 2014). The focus groups were designed to be as homogenous in order

to isolate as many variables as possible. For consistency of data, the same questions were posed to focus groups participants as we asked in the interviews.

Data Collection

The online survey was distributed to 81 employees and completed by 67 respondents, yielding an 83% response rate. A total of 15 interviews were conducted, reflecting a 19% of the surveyed population. A total of 24 subjects participated in focus groups, reflecting a 30% of the surveyed population.

Data Analysis

Descriptive statistics were calculated for the quantitative items on the survey. The qualitative data was examined, and the researcher identified common themes across participants' responses. Several consistent themes were identified within sample subgroups, as well as across the entire study. The findings of this study were also presented to the main stakeholders of the organization's diversity and inclusion assessment (e.g., members of the Senior Leadership Team and all COBA staff).

Summary

This chapter described the methods used to assess the diversity and inclusion climate at COBA in order to develop a diversity and inclusion management strategy for the organization. The research aimed to answer the following questions:

1) What level of understanding do the leadership and staff of COBA have of diversity and inclusion and its benefits?

2) What are employee perceptions regarding the culture of diversity and inclusion at COBA?

3) How do employees perceive their own experiences of diversity and inclusion at COBA?

4) What opportunities exist to implement of diversity and inclusion management strategies to maximize performance?

This study used a mixed-method design to gather data in three phases: incorporating a quantitative survey, one on one interviews, and focus groups. These methods were used to capture participants' responses, reflections, reactions, and insight related to their experience of diversity and inclusion within the organization. Of the 81 potential participants, 67 completed the survey, 15 completed an interview, and 23 participated in a focus group. Descriptive statistics were calculated for quantitative data and the qualitative data was subject to content analysis. The next chapter reports the study findings.

Chapter 4: Results

This purpose of the study was to determine answers to the following research

questions:

1. What level of understanding do the leadership and staff of Confident Organization Bay Area (COBA) have regarding diversity and inclusion and its benefits?

2. What are staff perceptions regarding the culture of diversity and inclusion at COBA?

3. How do staff perceive their own experiences of diversity and inclusion at COBA?

4. What opportunities exist to implement diversity and inclusion management strategies to maximize performance?

This chapter presents the findings of the study and describes the data collection

results and data analysis. The first section presents the data gathered using the survey,

comprised of the Mor Barak Inclusion-Exclusion (MBIE) Scale and Diversity Climate

Scale instruments. The second section presents data gathered through interviews and

focus groups.

MBIE Inclusion-Exclusion Scale and Diversity Climate Scale Survey Results

The survey was distributed to 81 COBA staff and 67 participants took the survey

for a completion rate of 83%. COBA employees were surveyed across three site

locations: San Francisco (n=38), Silicon Valley (n=22), and the East Bay (n=7). Of the

employees surveyed, three levels of leadership were represented: Senior Leadership

(n=6), Functional Lead Mid-Level Managers (n=7), and Staff (n=54). Other

demographics measured were gender, sexual orientation, race and ethnicity, education,

and disability. Table 4 outlines the descriptive statistics of the entire surveyed population

at COBA.

Table 4

Descriptive Statistics

Survey Factor	N	Min	Max	Mean	SD
Decision-Making Process	67	1.60	6.0	4.01	1.00
Information Networks	67	2.25	6.0	4.65	0.87
Participation and Involvement	67	1.50	6.0	4.42	1.00
Organizational Fairness	67	1.00	6.0	4.33	1.16
Organizational Inclusion	67	1.00	6.0	3.48	1.13
Personal Diversity	67	4.33	6.0	5.50	0.47
Personal Comfort with Diversity	67	2.33	6.0	4.26	0.90

The factor with the highest overall mean was Personal Diversity. Survey results indicated that 91% of participants strongly agreed that diverse viewpoints add value. Beyond that, 89.5% agreed that diversity is a strategic business issue important to COBA's success as an organization. Finally, 73% agreed that knowing more about cultural norms of diverse groups would make them more effective in their role. Incidentally, when it comes to individuals' actual comfort with diversity, or ease with groups different than themselves, the scores decreased. This demonstrated that though employees saw the connection between diversity and performance, they felt less comfortable in their actual interactions with those different than them.

The lowest overall factor was on Organizational Inclusion. Looking at the inclusion breakdown further, 82% disagreed with the statement that COBA has a mentoring program that prepares minority populations for promotion. Conversely, 88% agreed that management at COBA encourages the formation of employee support groups. Historically, several initiatives have been launched at the grass-roots level to have employee resource groups across various demographics. Despite this, only 52% of

participants indicated disagreement that COBA spends enough time on diversity

awareness and related training.

Further trends and patterns were found by looking at survey factors according to

site location. Table 5 shows survey significant factors as broken down by site.

Table 5

Significant Findings by Site Location

Survey Factor	San Francisco Site		Silicon Valley Site		East Bay Site		Notes
	Mean	SD	Mean	SD	Mean	SD	
Organizational Inclusion	3.23*	0.95	4.03*	1.22	3.07	1.27	*Significant Difference
Personal comfort with diversity	4.12*	0.84	4.67*	0.87	3.71*	0.95	* Significant Difference (SV Site)

Apart from site location, looking at the data according to leadership level was also

important. Table 6 addresses all factors broken out by leadership level.

Table 6

Significant Findings by COBA Leadership Level

Level	N	Mean	SD	F	df	Sig.
Decision Making Process						
Senior Leadership Team	6	5.07	0.70	7.04	2,64	.002
Functional Lead	7	3.14	1.36			
Staff	54	4.00	0.88			
Information Networks						
Senior Leadership Team	6	5.25	0.74	5.24	2,64	.008
Functional Lead	7	3.82	0.81			
Staff	54	4.69	0.83			
Organizational Fairness						
Senior Leadership Team	6	4.67	0.82	5.10	2,64	.009
Functional Lead	7	3.10	1.49			
Staff	54	4.46	1.06			
Organizational Inclusion						
Senior Leadership Team	6	3.33	0.96	5.83	2,64	.005
Functional Lead	7	2.21	0.67			
Staff	54	3.66	1.10			
Personal Comfort with Diversity						
Senior Leadership Team	6	3.94	0.65	3.49	2,64	.036
Functional Lead	7	3.52	0.57			
Staff	54	4.39	0.92			

The Functional Lead middle manager level showed the lowest mean scores to responses across all factors. This seems most poignant when it comes to the Organizational Inclusion factor. Staff typically have access to fewer information networks, less opportunity to participate in key decisions making processes, and fewer chances to influence outcomes than Functional Lead managers. Despite this, Functional Leads responded lower than Staff in every factor, with the exception of the Personal Diversity factor. Across the board, the Senior Leadership Team reported the highest average across almost all factors. One exception, however, was Senior Leadership's

responses to comfort with diverse groups were lower than Staff scores. This finding was further confirmed in the qualitative interviews and focus groups.

In addition to the findings above, the demographic data by race and ethnicity demonstrated statistically significant findings within the Organizational Fairness factor. Table 7 illustrates the Organizational Fairness factor broken down by race and ethnicity:

Table 7

Organizational Fairness Factor by Race and Ethnicity

Race/Ethnicity	N	Mean	SD	F	df	Sig.
Non-Hispanic White	21	4.73	0.89			
Latino or Hispanic American	10	4.55	1.01	2.68	4,57	.040
East Asian or Asian American	8	4.38	1.02			
Black, Afro-Caribbean, or African American	13	3.53	1.45			
Other	10	4.65	1.16			

The analysis indicated that Black and African American respondents perceive less organizational fairness than other races and ethnicities at COBA. Black and African American employees experienced less fairness around hiring practices, professional development, and opportunities for career advancement within COBA. Also, it is important to note that Caucasian non-Hispanic employees indicated the highest agreement around organizational fairness.

In further examining the data around Black and African American employee perception of organizational fairness, several points of interest surfaced. First, 62% of Black team members surveyed agreed with the statement, "I feel I have been treated differently because of my race, gender, sexual orientation, religion or age." Conversely, 62% of Black staff disagreed with the statement, "Managers here have a track record of hiring and promoting employees fairly regardless of race, gender, sexual orientation, religion or age." These statistics shed further light around COBA's African American

perceiving lack of fairness in treatment, hiring, and promotion as a result of their race and ethnicity.

Looking at factors according to age provides additional insights. Table 8 presents statistically significant findings in Decision Making Process and Organizational Inclusion factors according to age of COBA employees:

Table 8

Statistically Significant Findings by Age

Survey Factors	22-40 yrs. (n = 48)		Over 40 yrs. (n = 9)		T	df	Sig.
	Mean	SD	Mean	SD			
Decision Making Process	4.19	0.97	3.44	0.82	2.17	55	.034
Organizational Inclusion	3.34	1.01	4.19	1.24	-2.23	55	.030

22-40 year old employees perceived greater influence within their workgroups, supervisors, and the organization than their colleagues over 40 years old expressed $t(55)$ = 2.17, $p < 0.03$. Conversely, employees over 40 years old indicated higher perceived organizational inclusion within COBA as measured by opportunities for mentorship $t(55)$ = -2.23, $p<0.03$. At initial glance, this data might seem contradictory, but it is possible to see that while younger employees might experience greater influence in decision-making processes on their teams and with supervisors, they might have a lower perception of inclusion due to decreased opportunities to receive mentorship.

The final statistically significant finding surrounds perception of organizational fairness by COBA employees according to sexual orientation. Table 9 shows the differences in organizational fairness by sexual orientation:

Table 9

Organizational Fairness by Sexual Orientation

Sexual Orientation	N	Mean	SD	t	df	Sig.
Heterosexual or Straight	48	4.50	1.09	2.18	59	.034
Other	13	3.73	1.26			

Heterosexual employees at COBA had a higher perception of organizational fairness (as defined by preferential treatment in hiring, development and career progression or advancement) than employees that identified as LGBTQ, $t(59) = 2.18$, $p < 0.03$.

In conclusion, the survey data outlined quantitative findings across 67 COBA employees dispersed across three site locations (San Francisco, Silicon Valley, and the East Bay), delineated by three levels of leadership (Senior Leadership Team, Functional Leads, and Staff), and broken down according to various demographics (race/ethnicity, age, and sexual orientation). Findings were described using seven factors: 1) decision making process, 2) information networks, 3) team member participation and involvement, 4) organizational fairness, 5) organizational inclusion, 6) personal diversity being a value, and 7) personal comfort with diversity. Findings indicated that the personal diversity value factor was the most important to employees and that the organizational inclusion factor was the least important. Additionally, according to site breakdown, Silicon Valley indicated highest organizational inclusion and personal comfort with diversity, San Francisco scored lower than that, and the East Bay the lowest. According to race and ethnicity, Black and African Americans reported the lowest perception of organizational fairness. Looking at age differences, while 22-40 year olds reported higher involvement in decision-making processes, 40+ year olds indicated a higher sense of

organizational inclusion. Finally, along the lines of sexual orientation, LGBTQ+

employees experienced lower organizational fairness than their heterosexual colleagues.

Interview and Focus Group Results

Following the completion of the survey, 15 interviews and six focus groups were

conducted. Personal interviews were performed with the majority of COBA's Senior

Leadership Team members and Functional Leads, along with several selected several

staff. Focus groups were performed at the staff level, across the demographics mentioned

in Chapter 3. The same questions were used across interviews and focus groups for

consistency of feedback and data.

Seven predominant themes emerged from the qualitative research. Several of

these themes coincided with the quantitative survey results, serving to shed further

insight into the underlying potential root causes for higher or lower scores across certain

factors (such as high value of personal diversity across the organization or low inclusion

and organizational fairness within certain demographics at COBA.

Theme 1: Diversity and Inclusion are very high values of COBA Employees.

High scores from the survey were consistently supported by feedback provided across

both interviews and focus groups. One staff member stated, "I joined COBA because I

saw it as an organization that was operationalizing diversity to change the tech industry…

particularly by giving opportunities to first generation college students, students of color,

women and folks from low-income households." This theme is very much aligned with

the organization's mission to providing young adults with the skills, experience, and

support that will empower them to reach their potential through professional careers and

higher education. To be effective in pursuing this, COBA has a very diverse team, works

with very diverse student populations, and seeks to be a bridge to corporate America. For

many staff, this creates a significant desire to continue to learn, grow and develop in

awareness of dynamics around diversity and how to create an inclusive environment.

Another staff member shared,

> Being in a COBA learning community has been the most diverse
> community I've ever been part of. In supporting a diverse population
> of students heading into environments very different than what they've
> previously experienced, it's critical that we strive to understand our
> students experience and perspective. It's also crucial that we
> communicate clearly the reality they're entering into in their
> internship.

This value of diversity and the desire to maximize its benefits was evident across

all the board with COBA leadership and staff interviewed.

Theme 2: Low Sense of Organizational Inclusion. As the quantitative survey

data demonstrated, Inclusion was the lowest of all factors. In asking about this during

interviews and focus groups, several possible root causes were alluded to. First, team

members shared how a D&I expert had presented data during a COBA-wide staff in-

service training indicating that D&I corporate trainings yield minimal transformational

impact. As a result, regular COBA D&I trainings ceased in lieu of wanting to explore

other avenues for increasing diversity and inclusion awareness. Second, a reoccurring

possible root cause was Functional Lead middle management's perception of a low

inclusion. This dynamic might, in part, be tied to the complexity of leadership across site

locations that impacts inclusion at both the mid-management level, as well as on the

ground with staff at site locations. Most functional leadership and operational support for

COBA is centralized out of the San Francisco site. The challenges of geography and

different site models make for complex structural challenges in supporting staff on the

ground. San Francisco and Silicon Valley use an educational Core Model that differs

from the model at the East Bay site, a Professional Training Corps (PTC) model, situated

on a community college within the East Bay. The PTC model allows for collaboration

with the faculty and administration of the community college who are not employed by

COBA. In practicality, the Core and PTC models operate on different schedules with

different operational needs and challenges. These factors pose challenges to fostering

inclusion as easily with the East Bay site. During interactions with the East Bay Team,

the following feedback was provided,

> I don't feel included. Core [San Francisco and Silicon Valley] just
> collaborate constantly with each other is like, 'Oh yeah, we forgot East
> Bay, lets add them in and see if they can make it. If not, then, 'Oh
> well.' Even tiny things like the intern email titling it 'SFSV
> Internships,' not 'COBA Internships.' I know that seems
> inconsequential, but it's the afterthought feeling over and over and
> over again.

Another staff member chimed in to explain, "For the stipend, students at East Bay

earn $50 a week. It is different than San Francisco and Silicon Valley, but the program

here is also full-time so it makes it challenging to have a part-time job." These structural

differences will require additional intentionality to communicate value to all staff, as well

as to create systems that ensure inclusion despite a variety of needs stemming from

different models. COBA is set to launch a fourth site, using an entirely new model which

involves physically embedding the COBA site within a corporate organization's

headquarters to ensure greater collaboration with the organization. This new model will

impact these dynamics even further.

Theme 3: D&I at COBA is more personal than institutional. This theme is

closely related to COBA staff's value of awareness around diversity and inclusion, as

well as their understanding of its importance to improving organizational performance

and achieving their mission effectively. When asked to define diversity and inclusion a

staff member provided a very personal answer reflective of many staff responses, "D&I is

not believing that your culture is better than anyone else's, nor more appropriate. It's

important to understand the dynamics of your own cultural identity so you can

understand the dimensions of others." While many staff showed maturity and

sophistication in understanding the dialogue around D&I, there are limited organizational

systems in place creating institutional structures to ensure accountability and

sustainability around diversity and inclusion initiatives. Oftentimes, initiatives are

organically initiated at the grass-roots level by staff taking personal initiative to address

specific issues related to diversity and inclusion gaps or breaches. This is done with the

blessing of the Senior Leadership Team, but consistency and sustainability can be a

challenge when D&I is more informally driven. Evidence of this dynamic lies in the

reality that positions giving leadership to driving D&I initiatives are volunteer-based. As

one staff member articulated, "If we're talking about formal versus informal, I'd love to

see somebody hired to focus on D&I, so that it's not a volunteer role on top of someone's

already full-time job."

At the time of this study, COBA had no formalized comprehensive D&I strategy

supporting its business or people strategy, and there were little to no formal D&I metrics

in place around hiring, promotion, or employee performance. Multiple staff expressed a

desire for more institutional D&I focus at COBA,

> What I have appreciated most about working at COBA is the amount that I
> have learned. A lot of that has taken place by outside personal research I have
> done. I would like to see that as a shared value here, a shared journey of
> structured learning built into our work more.

Lastly, there are no formalized channels for COBA staff or students to escalate breaches of D&I when they experience challenges or discrimination. Again, while staff highly value D&I, and are largely aware and conversant, this tends to be driven by personal motivation rather than institutionalized accountability.

Theme 4: In the arena of D&I, the Senior Leadership Team is perceived to be disconnected from happenings on the ground at lower levels of the organization. This sense of disconnection extends from the question of how much the Senior Leadership Team is aware of, and can relate to, daily realities with students, events in COBA classrooms, and onsite within corporate internships. One staff member commented, "I would like to see senior leadership come into a classroom and observe. It's hard to make decisions that impact an entire organization when you're not in the trenches." The organization has sustained very rapid growth in a relatively short amount of time, and staff questions around this extend to inclusion as it relates to policies created in everyone's best interests:

> I have the sense that senior leadership cares about D&I and sees it as a priority. I think there's a bit of a tension with the leadership as the organization has grown bigger, as it can become challenging for senior leaders to maintain a strong sense of where staff are at. It would be helpful to have a clear channel of communication between those providing direct service and those who are deciding policies that impact everyone.

Beyond this, the Senior Leadership Team has gone through natural transition as different members have left and been replaced by new leadership. Historically, during the inception of COBA, the team was largely comprised of Caucasian men. More recently, the team has become more diverse in gender, race/ethnicity, and sexual orientation. That said, staff perception has not

necessarily caught up with the changes reflected within Senior Leadership. Across the board staff struggled to name the current members of the Senior Leadership Team. Beyond that, the perception exists that the team is still predominantly male and Caucasian. As one staff member put it, "I don't even know how many people of color are on senior leadership. What is senior leadership? What level does that actually refer to?" When minority staff are not aware of diverse representation in senior leadership, it can inhibit perception of organizational fairness, equal opportunity for career progression, as well as leadership's capacity to set direction and create policy that will benefit everyone. The perception of COBA's Senior Leadership Team as disconnected from the reality on the ground points both to perceived demographics on the team, as well as to the desire for intentional touch points with staff and students at lower levels of the organization.

Theme 5: Expansion at the expense of quality. This theme was briefly introduced in the last section as it relates to rapid expansion in a short amount of time. Staff expressed that with such a focus on outward growth, internal structures to support staff and students (such as a focus on D&I) have potential to suffer. With the opening of the East Bay site in 2017, and a new corporate site scheduled to open in 2018, growth is happening very rapidly. One staff member remarked, "We're more focused on expanding and growing rather than focusing on what we could do to support and improve the sites we have now. D&I is kind of an afterthought. We'll focus on growth first, then we'll throw in diversity." Rather than be viewed as a central means to achieving the organization's mission and vision, D&I was perceived as an additional obligatory initiative (on top of various

initiatives the organization is already pursuing). Given COBA's unique and

complex position of serving as bridge for diverse minority populations to enter

more privileged corporate spaces, a robust D&I strategy is critical to

operationalizing their mission. One team member expressed,

> Every team meeting we have is centered around growth and expansion. As
> a black male, I'm like, so we're not going to talk about the struggles of our
> black and African American male students? Nope. Because we're still
> getting those outcome numbers.

It is also important to note that the perception of growth over valuing the

internal support of staff and students contributes to the perception of the

disconnectedness of senior leadership.

Theme 6: Black and African American Staff Low Perception of

Organizational Fairness. During a focus group, one staff member shared the following

story,

> I remember once I was speaking to another black coworker, dropping my
> G's, speaking how the two of us would talk. Someone from senior
> leadership looked shocked that they would hear such dialect coming from
> my mouth. Just know that I'm going to do my work and do it well.

Another staff member recounted the following experience, which several African

American staff referred to across multiple interviews and focus groups,

> It was a situation a few years ago, we outreached and got forty [Black and
> African American] students from a district in lower east side of San
> Francisco. And I think in the first few months, more or less supported
> them by hiring themselves to program. And someone said, let's celebrate.
> Well at least we have these people still here. Then it didn't go well, and so
> many students dropped. There are community leaders in that district who
> don't trust us to send their students to COBA.

In response to these dynamics, as well as lower retention numbers for

African American students, COBA has launched the Black and African American

Student Association (BAASA) to address specific dynamics that students are facing. This group is working to explore solutions the will create greater equity to ensure support and retention for Black students. Given the critical nature of this initiative, the staff member leading BASA has been invited to sit on the Senior Leadership Team for representation and updates. Additionally, the staff serving on the Academic Team at the San Francisco site implemented a performance measure of retaining and passing 85% of their African American students in the classroom each semester. It is important to note that staff on the Academic Team expressed being unsure of how to implement changes in their classrooms and teaching styles to ensure this metric is being prioritized and met. Lastly, though BAASA is seeking to address student retention, little has yet been set in motion to address Black and African American perceptions of limited organizational fairness as it related to equitable hiring and promotion practices.

Theme 7: Inequity of career progression. Data around inequity of career progression initially surfaced in the quantitative survey factors around organizational fairness, especially with Black and African American staff and with employees that identify as LGBTQ+. Qualitative data from interviews and focus groups corroborated these findings: One employee shared,

> I've seen how certain folks' careers have been fast-tracked. I've been in performance evaluation meetings where folks have some very glaring growth areas, however, they still receive that promotion. I've seen folks say, I don't want to do this role anymore, and they pretty much find something else for them. I'm seeing that if you're a white woman, the sky's the limit.

Beyond race, new insights also came from feedback regarding dynamics related to advancement based on site location. Another employee voiced their concern in this regard,

> When I worked in the San Francisco site I built really strong relationships with folks, so I didn't worry about my own career advancement. I think it could be hard working at the East Bay or Silicon Valley sites to gain recognition for the work you've doing among those who sit in San Francisco.

Again, this perception by site location carries potential connection to underlying factors across several other themes: 1) low sense of inclusion on the part of Functional Leads who manage key functions, but sit in in San Francisco, and 2) the larger experience of exclusion by site location at the East Bay site. All of these dynamics have potential to contribute to the perception of inequity in career advancement opportunities at COBA.

Lastly, contributing to this theme are COBA alumni experiencing limited ability to advance within the organization once getting hired upon their completion of a COBA internship. Several alumni work throughout various departments of COBA and desire to advance in their careers. The challenges they face in moving beyond entry-level positions was articulated across numerous interviews and focus groups, both by alumni as well as by COBA staff more broadly. Several stories were shared of alumni not being promoted into positions but being asked to train the new incoming hire. One staff member stated their thought on the possible reasons behind this,

> For many of our alumni, it's their first job in a corporate environment aside from their COBA internship, and so I think there's not as much support for them to ramp up to what's expected. If we were really

walking the walk, we'd be preparing our alums and supporting them for career development.

The consistent challenges that alumni face impacts COBA's credibility, both as an organization embodying diversity and inclusion, but also in their mission of preparing graduates for the workforce. In talking to leadership and staff, there is solid awareness around this issue as it also seemed to be a larger organizational struggle at the national level across most sites within the U.S. and is therefore being evaluated on a larger scale.

In conclusion, 15 interviews and six focus groups were performed across all levels of leadership within COBA. Qualitative data was coded, and through the corroboration of the quantitative findings, seven themes emerged: Diversity and Inclusion are very high values of COBA Staff; Low Sense of Organizational Inclusion; D&I at COBA is more personal than institutional; In the arena of D&I, the Senior Leadership Team is perceived to be organizationally disconnected; Expansion at the expense of quality; Black and African American Staff Low Perception of Organizational Fairness; and Inequity of career progression. These findings, and corresponding recommendations, will be further explored in Chapter 5.

Chapter 5: Discussion

The purpose of this research was to perform an organizational assessment looking at the diversity and inclusion climate of COBA. The study aimed to answer the following questions:

1. What level of understanding do the leadership and staff of Confidential Organization Bay Area (COBA) have regarding diversity and inclusion and its benefits?

2. What are staff perceptions regarding the culture of diversity and inclusion at COBA?

3. How do staff perceive their own experiences of diversity and inclusion at COBA?

4. What opportunities exist to explore the implementation of diversity and inclusion management strategies to maximize employee engagement and performance?

Discussion

The findings point to several themes and opportunities, which find a basis in the literature review discussed in Chapter 2. Both quantitative and qualitative data indicated that diversity and inclusion are very high values for both leadership and staff at COBA. Employees' value for D&I was articulated across almost all interviews and focus groups. The fact that Personal Diversity was the highest rated factor by survey participants validated the trend that COBA leaders and staff view D&I as critical to organizational performance. Conversely, while diversity is a very high value of COBA leadership and staff, the Organizational Inclusion factor, referring to inclusion in areas such as mentorship, or the organizational preservation of the "old boys network," reflected the lowest survey scores. According to the literature, Roberson (2006) defined inclusion as the "organizational objectives designed to increase the participation of all employees and to leverage diversity effects on the organization" (p. 228). As such, gaining a deeper

understanding behind COBA's lower inclusion scores proved critical to this assessment. The following themes found in the data give insight into this.

Theme: Expansion at the expense of quality. This theme surrounds the perception that COBA focuses on outward growth and expansion to the detriment of focusing on internal structures, such as D&I initiatives, to support staff and student development and advancement. This seeming contradiction can be a false dichotomy. Rather than being at odds, a paradigm shift is necessary to see D&I as a critical piece to fulfilling COBA's mission, vision, and business strategy (Kepinski & Hucke, 2017). In this, leaders have the opportunity to strive for greater integration which views a comprehensive D&I plan as a means of supporting the fulfillment of COBA's expansion strategy. This can be accomplished by leveraging the best in people, and by creating inclusive structures that operationalize maximizing talent necessary for innovation and growth (Roberson, 2006).

Theme: D&I at COBA is more personal than institutional. Again, while the quantitative and qualitative research show that staff highly value D&I, through demonstrating awareness and fluency, this is often driven by personal motivation and initiative. Formally integrating D&I into COBA's business strategy will also be critical to building upon this personal conviction by continually increasing organization-wide policies, infrastructure, and accountability to ensure systemic sustainability and success. To do so, a comprehensive D&I strategy must be implemented, rather than more stand-alone D&I efforts. Cohesive terms and definitions, such as using the language of Diversity and Inclusion at COBA and engaging in corporate dialogue to determine shared and agreed upon meaning within the organization's context, will ensure greater clarity

and accountability. Research shows that organizations that have a cohesive D&I plan with goals, supporting actions, and clear accountability are much more likely to be on track with their D&I initiatives (Mor Barak, 2017). Within this, it will be important to identify clear and measurable metrics to integrate these into COBA processes (Ng, 2008). As with any other ambition, targets must be SMART – specific, measurable, achievable, realistic, and time-bound. Also, they must be designed to support the desired behavior and have a lasting impact. Meaningful metrics should be focused on specific challenges and show a trend of improvement in areas of concern. Evaluating the areas in which D&I can be made part of the core competencies of the organization will go far in supporting this as well (Bersin, 2015). Integrating metrics into performance evaluation, on both individual and corporate levels, will serve to increase organization-wide accountability. Lastly, institutional policy and channels for employees to report breaches in diversity and inclusion, as well as discrimination experienced, will be critical going forward.

  Theme: In the arena of D&I, the Senior Leadership Team is perceived to be organizationally disconnected. The reasons behind this perceived disconnect are multifaceted, spanning across several themes and factors that extend beyond diversity and inclusion. Within this, numerous staff expressed lacking clarity as to who precisely comprises the Senior Leadership Team (SLT). Steps can be taken on the part of the SLT to increase the team's visibility, as well as communication to ensure clarity as to who the team members are and their specific roles. There are significant implications of this disconnect for a thriving D&I strategy within COBA. Research shows that for D&I to be viewed as a credible, a comprehensive initiative that is integrated with COBA's business strategy, and formally driven by the SLT, will be important (Bersin, 2015). Beyond that,

the literature speaks to the importance of the involvement of Caucasian executives as being critical to the success of D&I within organizations (Ng, 2008). As such, it might be wise to consider what specific role COBA's Executive Director, who is Caucasian, will play in COBA's D&I initiatives (Ng, 2008). At COBA, the Executive Director's involvement in D&I initiatives could range from several options: 1) attending D&I workshops with other SLT members spearheading D&I, 2) periodically attending BAASA meetings, and 3) being at the forefront of communication around the Senior Leadership's incorporation of D&I initiatives into COBA's business strategy.

Theme: Black and African American and LGBTQ staff have a low perception of organizational fairness. Though COBA's Black and African American Student Association (BAASA) is seeking to address improving student retention, little seems to be aimed at addressing Black and African American employee perceptions around limited organizational fairness in hiring and promotion practices. A comprehensive COBA D&I management strategy should consider how best to engage in dialogue with Black and African American staff in the spirit of exploring restorative justice and implementation of formalized metrics and institutional structures to ensure equity in hiring, promotion, staff development, and career progression to mitigate bias. Bias impacts decision making across the employee talent cycle and business development cycle in organizations. Not only are biased decisions limiting who to hire, they also impact how performance is assessed, who gets key projects, who is promoted, who is heard, and more (Kepinski & Hucke, 2017). COBA should consider exploring activities, such as de-biasing assessments and dialogue, to look at individual

employee and structural bias potentially impacting Black and African-American and LGBTQ employees.

Theme: Inequity of career progression. Though this has briefly been discussed in relation to ethnic, racial, and sexual minority employees at COBA, it is also important to address in the context of COBA spanning across four sites where functional promotion decisions are often centralized out of San Francisco. Within this, as COBA plans to undergo organizational restructuring, there is an opportunity to evaluate how the proposed redesign might create structures that are more inclusive. This will be especially important to take into account when considering the role of the Functional Lead mid-management level, as well as inter-site dynamics between the four COBA sites in working towards greater inclusion of the East Bay and the new corporate site set to launch.

In conclusion, COBA has an incredible foundation with their very diverse team of staff and leaders desiring to continually grow in their understanding and embodiment of D&I practices. In spite of this, several significant groups have expressed experiencing marginalization and exclusion. Activities tend to be more sporadic, driven by motivated individuals who see a gap, and initiate stepping in to meet the need. As such, timing is ripe to look at the underlying causes of this and to explore ways to shift D&I from being a personal value of COBA employees to becoming more institutionalized through a comprehensive D&I management strategy aimed at strengthening policy, supporting business strategy and expansion, increasing metrics and formalizing accountability organizational fairness in hiring, career progression, and D&I breaches. More visible and

vocal leadership presence from the SLT will be critical the support needed to develop a comprehensive D&I plan with strategically cohesive and measurable actions.

Implications

This research has implications in the theory that it reinforces. The study demonstrates that though organizational culture can highly value the benefits of diversity and inclusion, without the structural and institutional policy to drive accountability it is not enough to create lasting a sustainable diversity and inclusion climate (Mor Barak, 2017). Beyond policy, the study illustrates that while an organization can embody diversity at all levels of leadership, the creation and implementation of a comprehensive diversity and inclusion management strategy is critical to ensuring that everyone's voices are heard, and full contributions are invited to maximize talent and innovation (Roberson, 2006). This D&I plan needs to be integrated within the organization's overall vision, mission, values and business strategy (Kepinski & Hucke, 2017). Within this, the study serves to validate research reinforcing the significance of executive leadership involvement, support and communication around the D&I strategy, especially when that leadership is Caucasian (Ng, 2008). This is not to say that grassroots involvement is not critical for ownership, simply that it must be both top down and bottom up.

From a practical standpoint for OD practitioners, on top of the best practices already outlined, two significant themes emerge. First is the incredible complexity of diversity and inclusion work within an organization. The dynamics are intrapersonal, interpersonal, systemic, and environmental. The work is both institutional in nature, but also very relational. It must be simultaneously driven by policy, strategy, and dialogue at all levels of the organization for any hope of transformation, growth, and change.

Recognizing this and approaching this complexity with the humility it deserves is critical for any D&I practitioner. Second, it is very important to approach with an appreciative lens, looking at the possibility of what might be. Though natural to do, focusing simply on the issues such as the dynamics of discrimination and breaches will limit the transformation that is possible. Instead, having a higher vision that compels the organization to create structures designed to empower every employee to maximize their contribution through fully bringing themselves, has potential to open up worlds of possibility. Organizations and their leadership need to grasp the benefits and value of this, far beyond avoiding lawsuits, or even the bottom line of increased profits due to innovation. If the focus can be higher, towards human flourishing, these other factors and issues will be taken care of in the process. A vision of this nature, similar to Dr. Martin Luther King, Jr.'s "I Have a Dream" speech is far more compelling and motivating for sustainable action in the midst of complexity than the alternative. For sustainability, approaching D&I with an understanding of its complexity and with an appreciative lens are critical for OD practitioners.

Study Limitations and Recommendations for Future Study

There are several limitations of this study. First, the quantitative survey was shortened from the original, which decreased sub-factor reliabilities on Mor Barak's (2017) Inclusion-Exclusion Scale, impacting the statistical significance of the organizational inclusion factor. Another limitation was the lack of benchmarking analysis with similar organizations that have also completed the MBIE and Diversity Climate scales for comparison purposes. Given this, the comparison of low and high scores within various factors was compared internally, but not externally. Being able to compare

externally would have allowed the research to determine how COBA measures up against similar organizations. Benchmark analysis within D&I would be insightful for future study. Lastly, COBA sits in the context of a larger, national organization that has its own diversity and inclusion initiatives on a broader scale that impact local branches. This study did not analyze the impacts of the parent organization's D&I structures, policies, or initiatives on the local Bay Area organization or sites. Analysis of these dynamics and implications would be important considerations for future study.

Summary

This chapter presented a summary of the findings and ensuing recommendations for further actions within diversity and inclusion initiatives for the organization based upon the literature. It also outlined integration of theory and practice, making more broad recommendations for OD practitioners. Lastly, it described limitations of the study and recommendations for future study.

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Appendix A: Survey Instrument

The Mor Barak Inclusion-Exclusion (MBIE) Assessment

Scale:
- 1 – Strong Disagree
- 2 – Moderately Disagree
- 3 – Slightly Disagree
- 4 – Slightly Agree
- 5 – Moderately Agree
- 6 – Strongly Agree

1. I have influence in decisions taken by my work group regarding our tasks.
2. My coworkers openly share work-related information with me.
3. I am typically involved and invited to actively participate in work-related activities of my work group.
4. I am able to influence decision that affect my organization.
5. I am usually among the last to know about important changes in the organization.
6. I am usually invited to important meetings in my organization.
7. My supervisor often asks for my opinions before making important decisions.
8. My supervisor does not share information with me.
9. I am invited to actively participate in review and evaluation meetings with my supervisor.
10. I am often invited to contribute my opinion in meetings with management higher than my immediate supervisor.
11. I frequently receive communication from management higher than my immediate supervisor (i.e. memos, emails).
12. I am often invited to participate in meetings with management higher than my immediate supervisor.
13. I am often asked to contribute in planning social activities and company social events.
14. I am always informed about informal social activities and company social events.
15. I am rarely invited to join my coworkers when they go for lunch or drinks after work.

MBIE Psychometric Properties: Accumulating research demonstrates the validity and reliability of the MBIE measure across diverse worker population groups in different countries. The initial version of the measure showed good internal consistency in a sample of 3,400 employees of diverse racial and ethnic backgrounds in a California-based high-tech company with a Cronbach's alpha of .88 (Mor Barak & Levin, 2002). Utilizing the inclusion scale in a multivariate model, the study demonstrated that women and members of racial/ethnic minority groups were more likely to feel excluded, and that exclusion was linked to job dissatisfaction and a lower sense of well-being. A series of cross-national studies demonstrated the resiliency of the measure across cultures. In a cross-cultural study with samples of employees from similar high-tech companies in the United States and Israel, the inclusion-exclusion measure similarly demonstrated good internal consistency with Cronbach's alphas of .90 and .81 for the two national samples, respectively (Mor Barak, Findler, & Wind, 2001). The theoretical factor structure fits both samples well (the Bartlett's

Test of Sphericity was 1342.30 and 406.72, each at p < .001, and the Kaiser-Meyer-Olkin measure was .87 and .78, respectively, for the two samples). The combined factors accounted for 65% and 67% of the variance in the two samples, respectively. A second study with these samples tested a multivariate model and demonstrated that ethnicity, inclusion-exclusion, perception of fairness, job stress, social support, and job satisfaction were all significant correlates of employee well-being (Mor Barak, Findler, & Wind, 2003). Utilizing only the national sample drawn from a high-tech corporation in Israel, a third study tested a theoretical model using structural equations statistical methodology. The study utilized the 10 items related to decision-making processes and information networks from a 15-item inclusion-exclusion scale and documented the measure's strong internal consistency with a Cronbach's alpha of .81. The findings demonstrated several significant associations between diversity and organizational culture, such as fairness and inclusion, employee well-being, job satisfaction, and organizational commitment (Findler, Wind, & Mor Barak, 2007). An earlier version of the scale (Mor Barak & Cherin, 1998) showed strong internal consistency (Cronbach's alpha = .87) and appropriate correlations indicating convergent validity (r = .63, p < .05) with Porter and Lawler's (1968) organizational satisfaction, and discriminant validity (r =~ .32, p < .05) with Porter's work alienation scale (Price & Mueller, 1986).

Diversity Climate Assessment

Scale:
    1 – Strong Disagree
    2 – Moderately Disagree
    3 – Slightly Disagree
    4 – Slightly Agree
    5 – Moderately Agree
    6 – Strongly Agree

1. I feel that I have been treated differently here because of my race, gender, sexual orientation, religion, or age.
2. Managers here have a track record of hiring and promoting employees objectively, regardless of their race, gender, sexual orientation, religion, or age.
3. Managers here give feedback and evaluate employees fairly, regardless of employees' race, gender, sexual orientation, religion, or age.
4. Managers here make layoff decisions fairly, regardless of factors such as employees' race, gender, sexual orientation, religion, or age.
5. Managers interpret human resource policies [such as sick leave] fairly for all employees.
6. Mangers give assignments based on the skills and abilities of all employees.
7. Management here encourages the formation of employee network support groups.
8. There is a mentoring program in use here that identifies and prepares all minority and female employees for promotion.
9. The "old boys' network" is alive and well here.
10. The company spends enough money and time on diversity awareness and related training.

11. Knowing more about cultural norms of diverse groups would help me to be more effective in my job.
12. I think that diverse viewpoints add value.
13. I believe diversity is a strategic business issue.
14. I feel at ease with people from backgrounds different from my own.
15. I am afraid to disagree with members of other groups for fear of being called prejudiced.
16. Diversity issues keep some work teams here from performing to their maximum.

Diversity Climate Scale Psychometric Properties: The scale, as well as each of its factors, showed strong to adequate internal consistency with Cronbach's alphas of .83, .86, .80, .77, and .71, respectively (Mor Barak et al., 1998). The factor structure was tested on a sample of 2,686 employees in a California-headquartered international high-tech company with a diverse workforce. The factors fit the data well—Bartlett's Test of Sphericity was 4593.15 at $p < .001$, and the Kaiser-Meyer-Olkin measure was .90 (Kaiser, 1970; Norusis, 1993). The four factors had Eigen values between 1.2 and 5.4, explaining 57.1% of the variance (factor I—29.9%; factor II—13.1%; factor III—7.4%; factor IV—6.6%). The results of the study examining ethnic and gender differences in employee perceptions of organizational diversity climate revealed that, overall, members of the majority group of the organization (White men) had more positive overall perceptions ("Things are good as they are") than women and members of racial and ethnic minority groups ("More needs to be done"). White men specifically perceived the organization as more fair and inclusive than did White women or members of racial and ethnic minority groups (men and women). Conversely, White women and members of racial and ethnic minority groups saw more value in, and felt more comfortable with, diversity than did White men (Mor Barak et al., 1998). The measure has been used by researchers in various studies in different contexts and with diverse population groups (e.g., testing management skills, examining diversity climate in health care organizations, testing leadership in a global context).

Appendix B: Interviews and Focus Groups

Structure of Interview Questions: D&I at the individual level, group level, organizational level

Overall Research Questions of the Study:

1. What level of understanding do the leadership and staff of Confidential Organization Bay Area (COBA) have regarding diversity and inclusion and it's benefits?
2. What are employee perceptions regarding the culture of diversity and inclusion at COBA?
3. How do employees perceive their own experiences of diversity and inclusion at COBA?
4. What opportunities exist to explore implementation of diversity and inclusion management strategies to maximize employee engagement and performance?

Interview and Focus Group Questions:

1. What is your definition of diversity and inclusion/cultural humility? What does it mean for you to be committed to these values?
2. What are the signs that COBA leadership understand and value diversity and cultural humility?
3. To what extent do feel that you can disclose your whole identity to your colleagues? Are there aspects of your social identity (gender, race/ethnicity, age, sexual orientation, etc.) that you feel you need to keep separate from the workplace? What's the impact of this?
4. Have you faced any obstacles in your ability to participate fully in work processes or initiatives, or support to advance your career, that are not experienced by all of your colleagues? Describe those obstacles.