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# What are the conditions of diversity, equity, and inclusion in organizations, given the recent social climate?

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WHAT ARE THE CONDITIONS OF DIVERSITY, EQUITY, AND INCLUSION

IN ORGANIZATIONS, GIVEN THE RECENT SOCIAL CLIMATE?

_____

A Research Project

Presented to the Faculty of

The Graziadio Business School

Pepperdine University

_____

In Partial Fulfillment

of the Requirements for the Degree

Master of Science

In

Organization Development

_____

by

Angela Dixon Williams

December 2023

This research paper completed by

**ANGELA DIXON WILLIAMS**

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

submitted to and accepted by the graduate 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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# Abstract

Following George Floyd's death in 2020, grassroots activism and protest reminiscent of the historic 1960s Civil Rights movement spread across the United States and abroad. Unlike the movement of the 1960s, the government did not respond with laws and oversight agencies to hold organizations accountable for change. Instead, corporate leaders voiced resounding commitments of financial pledges. Many organizations rapidly hired experts specializing in Diversity Equity and Inclusion (DEI) to address activist demands. Inspired by the 2020 social movement, this study aimed to explore the contemporary landscape of DEI through the lens of leaders in the field. The study applied a qualitative research methodology, capturing valuable insight regarding changes in organizations that uphold DEI principles. The information collected during the interviews underwent a thematic analysis applying a socio-technical framework. This approach enabled the scouting of trends impacting elements of the organization's design. Consequently, the research uncovered perceived conditions of DEI, surfacing challenges and opportunities encountered with integrating DEI into the fabric of organizations.

*Keywords:* Diversity, Diversity Climate, Diversity, Equity and Inclusion, Diversity Management, Social Movement

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**Acknowledgments**

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**Chapter 1: Introduction**

In a striking echo of the past, 2020 bore witness to a social movement resembling the historic Civil Rights era — recasting a glaring spotlight on systemic racism (Baum, 2021). The popular discourse surrounding Diversity, Equity, and Inclusion (DEI), a concept with origins in civil rights, took center stage. Activists rallied a resounding call to dismantle the deep-seated injustices impacting marginalized communities (Baum, 2021; Katz & Miller, 2021).

**Comparing 1960s Civil Rights and 2020 Social Justice Movements**

In the 1960s, similar broadcasts in the media depicting social tensions driven by grassroots actions and unrelenting protests captured a broad societal audience (Hall, 2005; Morris, 1984). Fueled by the mobilization of the African American communities, the movement's momentum pressured the government to enact a series of executive orders and laws (Graham, 1990; Maclaury, 2023) created to dismantle discriminatory practices in the workplace. Among the notable enactments of laws (Kochan & Cappelli, 1982, 1984) were Executive Order 10925 (Birnbaum, 1962) and the Civil Rights Act of 1964 Title VII amendment (Belton, 1978).

Initially, the laws, accompanied by federal mandates and the establishment of oversight committees, were designed to rectify racial discrimination, focusing on equal opportunities for African Americans and women (Dobbins & Kalev, 2013; Hellerstedt et al., 2020). However, as time progressed, legislative amendments recognized the marginalization of other identity groups, including ethnicity, race, age, religious beliefs, sexual orientation, and physical or mental disabilities (Edelman et al., 1991; Healy et al., 2010; Hellerstedt et al., 2020).

Corporations and federal government executives initially embraced a compliance strategy in reaction to the laws. Personnel experts lead the charge of interpreting and institutionalizing regulations to avoid litigation (Dobbins & Kalev, 2013; Portocarrero & Carter, 2022). The transformation within organizations, driven by the social and legal pressures, seemed to manifest in various aspects of the organization's design.

However, there remains a noticeable gap in research that explicitly investigates organizational-level changes and outcomes. Existing literature paints an unclear picture of the conditions stemming from the MeToo movement, Black Lives Matter, the death of George Floyd, the Global COVID-19 Pandemic, and other recent social events. The climate that materialized starting in 2020 offers an opportunity to examine similar circumstances in a comparable contemporary setting.

**The Modern Social Justice Movement Demands**

In 2020, over six decades after the civil rights era, the world witnessed a resurgence of the movement against racism (Baum, 2021). As news of George Floyd's tragic death streamed across multimedia channels (Hill et al., 2020), protests demanding the eradication of systemic racism emerged across the United States (Fisher & Rousse, 2022; Katz & Miller, 2021; Lopez, 2020). Exacerbated by the COVID-19 pandemic (Gauthier et al., 2021; Germain & Yong, 2023, the modern movement raised domestic and global awareness of the persistent racial inequities (Clausen, 2020). The rapid spread of the virus uncovered deep-seated flaws within healthcare (Tan et al., 2020), employment practices (Kantamneni, 2020), and a myriad of social issues disproportionately prevalent among marginalized communities (Madgavkar et al., 2020; Reber et al., 2022; Tan et al., 2020).

The events of 2020 unfolded on the heels of the Black Lives Matter (Baum, 2021) and the MeToo movements (Brown, 2022). This was in an environment where 60% of Americans reported experiencing discrimination in the workplace based on race, gender, age, or LGBTQ+ identity (Jackson, 2020). Additionally, the unemployment rate for persons with disability surged from 7.8% in February 2020 to 18.9% in April 2020 (Employment of Persons with a Disability: Analysis of Trends during the COVID-19 Pandemic, February 2022).

**Direct Corporate Responds to Social Imperatives**

As the movement of 2020 gained momentum, corporate leaders publicly acknowledged the calls for systemic change. In comparing the civil rights movement, the response to activist demands in 2020 did not yield the same level of rigorous federal legislation that occurred during the civil rights era. The federal government did not commission federal agencies to enforce corporate accountability for adherence to the laws. Instead, organizations embraced a different approach by announcing funding pledges and accelerating the hiring of DEI experts. Jan et al. (2021) reported public statements of unprecedented financial commitments totaling approximately $50 billion toward efforts confronting systemic racism. "Profit-driven corporations will not propel transformational change with money alone. That will require corporate and government policy changes to address the historical destruction of Black wealth" (Jan et al., 2021, p. 9). While money alone was not the sole solution, organizations with new funding resources quickly acquired DEI experts to help address the social concerns of racism in the workplace (Anderson, 2020).

*Growth in DEI Leadership*

According to Global LinkedIn's data, the trajectory of the already growing DEI field continued to increase between 2005 and 2020. A substantial surge in postings for DEI roles soared by a factor of 4.3x, equivalent to 71% growth in job opportunities. Positions such as Head of Diversity saw an exceptional increase of 107%, followed by Director of Diversity at 75% and Chief Diversity Officer (CDO) at 68%. Moreover, since 2021, out of the four C-suite roles achieving over 100% growth, the CDO has climbed the most, reaching 168.9% growth between 2019 and 2022 (Anders, 2022; Anderson, 2020).

*Elevating DEI within Organizations*

Shi et al. (2017) aptly outlines that an organization's commitment to establishing or elevating a function-specific unit around a new senior position "not only demands investments in terms of human resources, finances, and time, but also entails establishing priorities, objectives, communication channels, and organizational routines that harmonize seamlessly with the rest of the organization" (p. 84).

Scholars have extensively studied the progression of new roles, such as the CDO position, with the inherent responsibility of fulfilling unique demands. In these instances, organizations favor an assimilation approach when the role lands within the highest management level. It then integrates with existing organizational structures while accounting for internal and external environmental variables (Hambrick & Cannella, 2004; Menz, 2012; Menz & Scheef, 2014; Nath & Mahajan, 2008; Shi et al., 2017). This philosophy emphasizes how elevating the function of DEI and the leaders supporting DEI

within organizations requires deep integration of existing structures, processes, and people to achieve systemic change.

As evidenced by increased hiring and the promotion of DEI professionals to the top management level, recent events have prompted direct corporate response to fulfill society's expectation of change resulting from the demands of grassroots activists (Gupta & Briscoe 2020). This shift, combined with corporate commitments to advance efforts against systemic racism, demonstrates that workplace conditions are not immune to the influence of the broader social climate (Georgallis, 2017; Katz & Miller, 2021; Portocarrero & Carter, 2022). Therefore, in consideration of these aspects, the study proposes the exploration of the following research questions:

- RQ1. What are the conditions of DEI in organizations?

- RQ2.What changes related to DEI have occurred in organizations?

- RQ3. How has the environment influenced the function of DEI in organizations?

**Study Purpose**

This qualitative exploratory study examines the state of DEI in organizations. By analyzing existing literature, I aimed to gain a deeper understanding of the historical context of DEI and how social determinants have influenced DEI in organizations. Antecedent studies on DEI conditions primarily examine demographic data such as gender and race. Therefore, scholars adhering to this norm tend to evaluate outcomes of behavioral-based solutions, such as training and human resources practices (Pugh et al., 2008), affecting individuals and groups (Alay & Kan, 2020; Alderfer & Smith, 1982; Schneider & Reicher, 1983). The study intends to contribute to the renaissance of DEI

literature. Since 2020, scholars contributed to the upturn of research in the field, advancing existing literature covering a range of DEI topics (Yeo & Jeon, 2023).

In contribution to emerging literature, this research views DEI as an essential organization component. It engages with internal and external environments while integrating with the organization's strategy, structures, people, processes, and technology. Therefore, this study embarks on an exploration of DEI, focusing on organizational-level change. Additionally, this study capitalizes on a small sampling of nine DEI leaders to gain a profound perspective on the DEI-related changes that occurred in organizations after 2020.

**Significance and Applications**

The impact of this study lies in the potential to characterize the state of DEI in organizations and highlight the interplay of social climate influence. DEI leaders navigate complex circumstances (Briscoe & Gupta, 2016; Hellerstedt et al., 2023), deliberating how and when to engage with prevailing social issues (Hellerstedt et al., 2023). The study posits that ongoing changes in the workplace, in response to social events, will prompt corporations to scrutinize the effects of DEI in bringing about systemic transformation.

**Study Outline**

Chapter 1 provides the study's background, purpose, and rationale supporting the research question. Chapter 2 presents definitions of relevant terminology, contextual perspective, and a chronology of the state of DEI in connection with adjacent social movements. Chapter 3 details the participant demographics, research methodology, data collection, and analysis. Chapter 4 describes the qualitative analysis results. Chapter 5 finishes with the conclusion discussion, implications, and recommendations.

**Chapter 2: Literature Review**

Chapter 2 of this thesis establishes the foundation for this study by examining diverse literature across multiple domains, such as diversity management, diversity climate, social movement, and organization theory. This review investigates existing literature to support the concept of DEI conditions and social climate as interpreted within the context of this thesis.

**Defining Diversity Equity and Inclusion**

DEI is a young field born of the diversity management movement. The field is rooted in social protest: civil rights and liberations movements of the 1950s through the 1970s, judicial rulings and federal and civil rights and equal opportunity legislation in the 1950s and 1960s, and demographic-economic changes in the 1980s and 1990s (Brazzel, 2003). In the 1960s, academic interest in the field of diversity began to surface. However, it was not until the 1980s that the diversity movement sparked new interest in research, studies, teaching, and practice. This historical evolution of diversity management applied behavioral science, community organization, and social action consistently shapes the landscape of DEI.

In the organization context, the DEI function typically focuses on individuals' unique qualities, experiences, and work styles, encompassing identities such as age, race, religion, disabilities, and ethnicity. DEI explores ways to support business objectives by unleashing distinctive individual qualities to achieve desired outcomes. It encompasses diversity-related careers, communications, legal and regulatory issues, technology, metrics, outsourcing, effective diversity practices, and global diversity issues. At times, this function may interact or intervene in issues related to federal, state, and local equal

employment opportunity (EEO) laws. However, these matters often fall outside the primary scope of the DEI function.

This study aims to amplify integral theories and methods rooted in organizational change, behavioral science, and social science in describing DEI and the initiation of organization change related to DEI interventions at various levels (i.e., individual, group, organization, community, societal level) of a human system (Brazzel, 2003). It examines DEI at the organizational level as a function — implementing and integrating DEI principles. This study perceives DEI as a specialized part of an organization's functional structures, such as operations, marketing, and strategy (Georgakakis et al., 2022; Hambrick & Cannella, 2004; Menz, 2012; Menz & Sccheef, 2014; Nath & Mahajan, 2008).

Based on this foundational definition, the organization's mission, vision, and goals serve as the driving force for developing organizational capabilities, practices, and tasks aimed at embedding DEI into core operations. Therefore, strategy becomes a crucial part of shaping the direction of DEI, facilitating the development of structures, processes, and people, and steering behaviors toward strategic objectives. The strategy guides organizations through the systemic transition from diversity to equity and ultimately gains the inherent benefits of inclusion (Baum, 2021; Bernstein, 2020). Further elaborating upon Bernstein (2020), the interconnected aspects of DEI are defined in principle as follows:

> Diversity, sometimes called representational diversity (Weisinger & Salipante, 2005), describes individuals with distinct group affiliations and cultural backgrounds within a specific social system (Cox, 1993, p. 5). Moving beyond a

single focus on diversity toward inclusion requires integrating all employees into the organization's culture and processes. (Mor-Barak & Cherin, 1998, p. 48). Inclusion measures how organizations build connections with individuals as part of a critical corporate function. These outcomes demonstrate the ability to maintain open access to information and resources, encourage participation in work groups, and influence the organization's decision-making processes. Equity involves removing systematic disparities among groups possessing varying degrees of social advantage or disadvantage regarding wealth, power, or prestige (Chin & Chien, 2006, p. 79). Unlike inclusion, equity targets systemic organization outcomes rather than individual or group dynamics. It requires recognizing and rectifying intrinsic systemic and structural injustices (p. 5).

Recently, new dimensions of social considerations have further defined the scope of DEI, such as Justice (J), Accessibility (A), and Belonging (B) or a combination of terms like EDI, JEDI, and DEIA (Alluri et al., 2022; Garg & Sangwan, 2021; Wolbring & Ngyuen, 2023; Woodley, et al., 2021; Yeo & Jeon, 2023). While not explicitly specified in this thesis, the broader definition of DEI used in the study incorporates the essence of these terms.

### Contextualized Perspectives of DEI Conditions

When examining challenges and opportunities faced by employees and leaders related to DEI, it is crucial to reflect on context — the situational factors influencing organization behaviors (Johns, 1991, 1993, Mowday & Sutton, 1993) to comprehend the current state within an organization. Existing studies leveraging diversity climate frameworks concentrate on workplace demographics (i.e., gender and race) and

behavioral-based solutions (Pugh et al., 2008). The research methods used in these

studies measure the effects of individual or group-level DEI practices within

organizations (Alay & Kan, 2020; Alderfer & Smith, 1982; Schneider & Reicher, 1983).

Similarly, numerous scholars such as Kossek and Zonia (1993), Hicks-Clarke and Iles

(2000), Cox (1993), and McKay et al. (2007) have conducted field research and

developed models demonstrating a tendency toward assessing DEI interventions based on

demographic outcomes (Alay & Kan, 2020; Alderfer & Smith, 1982; Knouse et al., 2008;

Pugh et al., 2008; Schneider & Reicher, 1983).

      Although a subset of studies examined the interplay of social movement and

organization theory, scholars primarily focus on the link between legal policies as drivers

for organizational change supporting DEI. These studies give minimal attention to the

nuanced connection between the social environment and organizational changes that have

occurred. One rising trend explores various connections with diversity and social

movements, organization theory, and legislation (Armstrong 2005; Campbell, 2005;

Dobbins & Sutton 1998; Edelman, 1992; Haveman & Rao 1997; Minkoff 1993). The

field concept applied by organizational theorists seems prevalent among these studies.

The theory references the field as a conglomerate of essential stakeholders (e.g.,

suppliers, resources, product consumers, regulatory agencies, and other organizations)

and producers of similar commodities (Di DiMaggio & Powel, 1983; Edelman, 2010).

      Notably, this theoretical framework applies to social movements and legal fields,

as each possesses vital actors (e.g., organizations, stakeholders, administrative bodies,

courts, and legislatures) operating to change social systems or to implement legal

requirements (Bourdieu, 1987, Edelman, 2007, 2010; Edelman et al., 2001, Noy, 2009).

The overarching idea of a field incorporates the collective efforts of diverse stakeholders and disciplines engaged with implementing DEI in organizations (Brazzel, 2003; DiMaggio & Powel, 1983; Edelman, 2010). The intersection of these fields presents an opportunity for future field-level analysis to unveil patterns otherwise undetectable at the individual, group, or organization level.

Alternatively, this study draws from this field theory and several emerging sociological studies involving various institutions such as corporations, universities, and hospitals (Briscoe & Gupta, 2016; Davis & Thompson, 1994; Haven & Rao, 1997; Morrill et al., 2002). The research introduces the concept of activism as private politics distinct from public politics regarding the conditions in organizations (Baron, 2001, 2003; Baron & Diermier, 2007; 2009; Briscoe & Gupta, 2016; Edelman, 1990). Baron (2003) elaborates on private politics as a corporate strategy in which the organization directly addresses activist demands, engaging in self-regulation, thereby proactively circumventing federal regulations and legal constraints (Georgallis, 2017).

Social activists collectively launch efforts to address social problems and provoke organizational change (Briscoe & Gupta, 2016). Expanding on this concept, stakeholder theory and related frameworks discuss the idea of activists as organizational stakeholders. By orchestrating a spectrum of disruptive actions, from everyday displays of resistance to broader national and transnational movements (Almeida, 2019), the activists arguably contribute to organizational transformation. This ideology underscores the importance of social activism within and surrounding organizations (Bundy et al., 2013; Frooman, 1999; Rowley & Moldoveanu, 2003).

Social movement and organization theory attribute innovations and change to episodic contention of exogenous shocks, according to Edelman (2010) and Sewell and Sewell (1996). Crisis, uncertainty, and the mobilization of dissidents around a specific interest signal these episodic events. The emotional buildup and tension expended toward challenging the dominant norms, policies, and beliefs become unstainable until settlement occurs in the organization field. Consequently, actors generate and normalize alternative ideas and principles that emerge (McAdam & Scott, 2005, Schneiberg & Soule, 2005). Furthermore, Cummings and Worley (2019) describe the occurrence of "significant disruptions" when an organization encounters a substantial alteration in its strategy and business model, a common factor in its transformation. Thus, "Almost every transformational change involves important shifts in the organization's design—the configuration of structures, work processes that guide members' behaviors in a strategic direction" (p. 490).

### Tracing the Connections Between DEI and Social Movements

Though anchored in civil rights, the historical journey of DEI dates back well before 1960. During this period, the seeds of social events and the potential of activism to influence change were already evident, particularly regarding actions to eradicate labor-related discrimination (Birnbaum, 1962; Hellerstedt et al., 2020, 2022; Morris, 1984). An example of earlier responses to social activism was in 1941. The Brotherhood of Sleeping Car Porters and other African American leaders demanded federal government actions to end discrimination in the defense industry or face widespread protest (Santoro, 2002). The executive office averted the promise of a mass march on Washington by issuing EO 8802. The mandate declared, "… [it is] the duty of the employer and labor organizations,

[by policy and the EO] to provide full and equitable participation of all workers in defense industries, without discrimination because of race, creed, color, or national origin…" (National Archives, Executive Order 8802, 1941). The order provisioned the creation of the Office of Production Management, Committee on Fair Employment Practice (FEP). Subsequently, the government appointed members to the committee, entrusting them with investigating grievances. Committee members handled validating complaints and implementing measures that addressed reported discrimination issues. (Birnbaum 1962).

Executive Order 9980 followed in 1948, laying the groundwork for nondiscrimination policies explicitly within the federal government. The order specified that each department head designates a Fair Employment Officer (FEO) for all federal agencies (Harry et al., 1948). As the oversight entity, the FEO's responsibilities included managing personnel actions, discrimination complaints, and reporting to the executive administration. The Fair Employment Board (FEB) took on the role of advisor and coordinator, working with department leads to support EEO programs and review contested claims (Harry et al., 1948).

These early strides to combat discrimination focused on contractors and federal agencies. Although the federal government appointed committees to oversee grievance and compliance, their limited enforcement authority failed to motivate contractors to institutionalize the laws (Barkan, 1984; Brown, 2014; Graham, 1990; Morris, 1984).

### The Rise of 1960s Grassroots Activism

By the 1960s, increasing social discontent with sluggish progress in eliminating discrimination became apparent as African American communities mobilized civil rights

activism, protest, and political organizations (Barka, 1984; Brown, 2014; Graham, 1990;

Morris, 1984). The grassroots movement gained national attention, igniting a collective

social power (Hall, 2005; Morris, 1984). James Robinson, former Executive Director of

the Congress of Racial Equality (CORE), emphasized the transformative influence of

such actions. The impact of the movement led to significant changes in corporate policies

and practices. These events altered his understanding of the potential of collective action

as a catalyst for change (Morris, 1984). He discussed his experience in a 1978 interview

when asked to define power, he stated, "Well, [power] is not money. It is a sense of

power because what we did was making a difference in society". He continued the

conversation with an example of his experience:

> I was astonished. Woolworths [the chain] eventually caved in. I thought we were
>
> doing many demonstrations in the North and doing a lot of siting in the South, but
>
> when adding it all together, it was not enough to make a big corporation change
>
> its policy. But it did. When I first became interested in racial equality, I had no
>
> idea it could make that much difference in that amount of time.
>
> (James Robins Interview, 1978, New York; Morris, 1984, p. 230).

The civil rights activists deployed a myriad of strategic and tactical efforts to

uncover systems of discrimination. Frymer (2007) notes the work of activists shedding

light on union seniority structure as a barrier in prohibiting black workers from union

leadership positions. Additionally, the movement unveiled union practices creating

inequities in job duties, pay scales, and the exclusion of marginalized communities from

apprenticeship opportunities. In a campaign to raise awareness of these issues, the civil

rights leaders organized black caucuses and explored alternative trade unions. The

activists orchestrated memo drives and protests exposing how union associations

perpetuated workplace systems of discrimination and segregation (Frymer, 2007;

Graham, 1990; MacLaury, 2010).

### Reintroducing Affirmative Action

The 1935 National Labor Act introduced affirmative action to protect workers'

rights by promoting unions and facilitating collective bargaining to resolve unfair labor

practices (Graham, 1992; MacLaury, 2010). During the social unrest of the 1960s,

activists called for more assertive government actions to address civil rights issues. The

term affirm, or affirmative action, became the popular catch-all phrase describing social

demands and efforts to end discriminatory practices. The federal government, seeking the

support of civil rights activists, embraced the term to bolster initiatives, reinforcing

efforts to portray alignment with the civil rights movement (Maclaury, 2010).

The issuance of Executive Order 10925 in 1961 only vaguely mentioned

affirmative action and retained much of the language of prior nondiscrimination laws.

However, the laudable public declaration from the executive office introducing

affirmative action as a moral imperative marked a pivotal turning point in affirmative

action discourse (Graham, 1990, 1992; MacLaury, 2010).

### Government Response to Activist

Subsequently, amid mounting national pressures advocating for moral justice

(Pedriana & Stryker, 2004; Santoro, 2002), the federal government passed the 1964 Civil

Rights Act, fortifying existing equal opportunity laws. The directive stipulated the

designation of staff members who would inherently gain the authority to lead and execute

affirmative action measures. One of the act's requirements necessitated structures for

monitoring, tracking, and actively promoting the advancement of documented goals.

Another mention in the law called for appointing individuals who could engage with

managers in open dialogue regarding progress in accomplishing the priorities

documented in the nondiscrimination plans (Strum, 2011). The law further stated that

these individuals required direct access to executive management (Linnehan & Konrad,

1999; Nardini et al., 2020; Reskin, 2003).

Yet, one of the most significant changes in the law was Congress's expansion of

Title VII (Dobbins & Kalev, 2013). In addition to prohibiting discrimination based on

race, the amended provision extends the law to include the abolishment of discrimination

based on sex — steering the legislative focus toward issues impacting women in the

workplace. It also established the Commission on Equal Employment Opportunity

(EEOC) (Brown, 2014; Civil Rights Act of 1964; 7/2/1964; Enrolled Acts and

Resolutions of Congress, 178– - 2011) with the power to monitor compliance, impose

sanctions, and conduct hearings for non-compliant organizations (Santoro, 2002).

The late addition of sex as a protected class fueled the burgeoning women's

movement. Women activists played a substantial role in fostering political momentum to

address workplace discrimination based on gender. Toward the decade's end, women's

issues continued to seize widespread public awareness (Graham, 1990; Lenhof, 1981),

galvanizing government and corporate support (Anand &Winter, 2008; Stainback &

Tomaskovic-Devey, 2012)

Still, the EEOC's jurisdiction only covered three sectors of the federal arena:

government contractors, unions as proxies for government employees, and government

employers (Birnbaum, 1962; MacLaury, 2010).

*Corporate Response to Activists and Laws*

Scholars described the barrage of nondiscrimination legislation as porous and open to interpretation (Crenshaw, 1988; Dobbins & Kalev, 2021; Edelman et al., 1991; Pedriana & Stryker, 2004).

> The fragmentation of the U.S. state, with powers dispersed across the federal, state, and local governments and with legislative, judicial, and administrative branches at each level, [this] is usually described as a weakness. The paradox of this kind of weakness is that it led to extensive corporate compliance efforts by firms worried that agencies and courts might change compliance standards… The result is that the state was "porous," open to input (Dobbins, 2009, p. 6).

While the laws guided the development of structures and processes, they were far from prescriptive in describing what organizations should do to comply with equal-opportunity policies (Edelman et al., 1991; Graham, 2009). They lacked social and legal clarity regarding discrimination or equality. However, according to Scott and Meyer (1983), this is not so much a flaw in the legal systems as it is a consequence of a legal foundation intended to support participatory democracy. Creating an environment of continuous uncertainty enabled power distribution across federal and local governments. Maintaining the openness of the law allowed the government to reinterpret its meaning while giving private citizens and organizations options to contest the intent of the law (Dobbins & Kalev, 2009; Scott & Meyer, 1983).

Additionally, another dynamic derived from the revolving door of the underfunded federal oversight committees existed. Oversight entities created in tandem with the enactment of nondiscrimination laws lacked authority and resource capacity

(Cranston, 1979), which stifled the ability of these entities to enforce rules of such scale (Graham, 2009; MacLaury, 2010; Pedriana & Stryker, 2004).

Furthermore, the culmination of ambiguous laws and anticipation of legal ramifications contributed to many interpretations of the law (Anand & Winter, 2008). Corporations fearing the potential of legal consequences and contractors worried about the more imminent threat of contract sanctions sought ways to circumvent the prospect of costly and humiliating court actions. Under these circumstances, many organizations chose to take charge of determining how to comply with the law (Anand & Winter, 2008; Dobbins & Kalev, 2021).

***Early Corporate Interventions: Plans for Progress***

Federal contractors led the way in addressing nondiscrimination policies. Following the enactment of Executive Order 10925, which formalized fair employment practices, contractors (Dobbins & Kalev, 2013; Graham, 1990) embraced the privately administered "Plans for Progress" subcommittee. Company leaders proclaimed their commitment to the plans by signing pledges to implement fair hiring and termination procedures. Enrollment into the program required each participating organization to develop plans detailing remedies that addressed non-discrimination. Though the goals and priorities of each strategy differed fundamentally among organizations, expectations for all employers entailed active recruitment of job applicants from black communities and hiring qualified candidates for salaried positions.

An unintended consequence of the plan was its popularity among leading corporations. Even though the executive order targeted federal contractors, large companies without federal contracts proactively enrolled in the program. Contractors and

private organizations collaboratively developed strategies promoting fair employment

practices (MacLaury, 2010). By mid-1965, most of the 300 companies signed up for

Plans for Progress had created internal plans tailored to their organization to combat

discrimination impacting their workforce (Dobbins & Kalev, 2013).

The concept of these plans reached "smaller companies, and by 1970. One in five

employers reported having plans [to] protect marginalized communities" (Dobbins &

Kalev, p. 256). The upward trend grew to "nearly half of surveyed employers by 1980"

(Dobbins & Kalev, 2013, p. 256). Because the plans excluded predetermined

employment quotas, measures of success hinged on assessing training improvements and

employment outcomes (Graham,1990; MacLaury, 2010).

### *Implementing Corporate Compliance Strategies*

Apart from Plans for Progress, early reactions from employers toward the

legislation policies remained meager (Dobbins, 1992; Graham, 1992; Kim et al., 2012) at

the start of the 1960s. Graham (1992) discussed the ongoing social unrest and riots

between 1965 and 1968 as indicative of the civil rights narrative:

Black disadvantage [that] was not only viewed as a legacy of slavery and

segregation but as a consequence of institutionalized racism woven into the fabric

of American life. Discrimination was thus seen to persist even in the absence of

conscious prejudice and specific acts of discrimination (Graham, 1992p. 58;

Jeffrey, 1997). This explained the fact that, in the late 1960s, the unemployment

rate of blacks was double that of whites, even in the north, where the Fair

Employment Commission had policed discrimination for a generation (p. 58).

These shortcomings caused theorists to contemplate outcomes-based alternatives to minority preference. The swells of social pressures signaled a need for more obtrusive actions and demonstrated achievements (Graham, 1992). The government responded in 1965, giving the EEOC authority to oversee national fair employment agencies. By 1968, the Office of Federal Contract Compliance (OFCC) adopted a similar model, expanding its influence throughout the federal government.

From 1960 to 1970, there was a notable increase in women, representing seven of 10 personnel workers (Dobbins, 2009, Soule & Olzak, 2004). This growth coincided with the rising influence of the women's movement, both in terms of political and public presence. As more women entered the personnel field, their collective power seemed to osculate inside and outside organizations, becoming the catalyst for addressing challenges encountered by women in the workplace (Graham, 1992).

In 1970 and 1971, the Department of Labor issued Order Number 4, which introduced more rigorous requirements and called for an escalation in compliance reviews and reporting obligations for federal contractors. It endowed compliance officials in all federal agencies with almost plenary powers for determining what numbers placed contractors in full compliance. (Graham, 1992).

Additionally, the 1971 landmark case of Griggs v. Duke Power (401 U.S. 424, 971) played a role in refining the concept of discrimination. It extended the definition to include employment practices presenting a disparate impact on marginalized communities and women, marking a significant legal development in the context of workplace equality.

The Office of Federal Contract Compliance Programs (OFCCP) mandated the inclusion of Affirmative Action Plans with a narrative declaring the organization's "numerical goals" (Graham in 1992, p. 59). In 1972, Congress granted the EEOC the authority to initiate lawsuits (Dobbins, 2009; Graham,1990). With new armor, compliance agencies took legal actions against corporate giants like AT&T and Bethlehem Steel, resulting in settlements of retroactive seniority, back pay, and the institution of hiring and promotion targets to correct gender and racial discrimination.

While Affirmative Action directly impacted federal contractors, it is essential to note that EEO laws applied to all employers. In addition, under the law, employers were obligated to conduct annual workforce assessments to evaluate progress (Dobbins, 2013; Nardini et al., 2020; Shaeffer, 1973).

**Driving Organization Change**

Executives searching for solutions demonstrating compliance with nondiscrimination laws turned to personnel experts. Personnel had become adept at navigating many human relations issues, maintaining foundational tasks of recruiting, hiring, training, compensation, and supervising (Dyer & Burdick, 1998). As personnel experts navigated the evolving external pressures, government entities (Dobbins, 2021; Edelman,1991; Portocarrero, 2021) and oversight committees (Graham, 1992) often lack clarity and the power to enforce nondiscrimination effectively. Without robust legal enforcement mechanisms, the self-interest of organizations and the personnel profession often prevailed.

DiMaggio's theory (1983) describes such pressures driving change in organizations and professional collectives as three fundamental isomorphism drivers, as illustrated in Table 1.

**Table 1**

*Characteristics Driving Organization Change*

| Types of Isomorphisms | Change Scenarios | |
| --- | --- | --- |
| | Description | Influence |
| Coercive Isomorphisms | Organization A wields power over Organization B, compelling B to cooperate or comply. | Power and dependency between organizations, societal tensions, and external forces provoke action. |
| Mimetic Isomorphisms | Organization A imitates the behaviors of other organizations, especially in unclear circumstances. | Ambiguity and uncertainty lead to copying other organizations' practices to adapt to similar challenges. |
| Normative Isomorphisms | Communities, organizations, or professionals desire to standardize and legitimize (achieve professionalization in) a particular field. | Socialization of values and guidance fosters normalized work performance. |

Inside organizations, a combination of considerations, including legal threats, societal pressure, public relations concerns, the desire to legitimize the personnel profession, market competition, and various corporate aspirations, collectively contributed to the coercive conditions that compelled organizations to align with evolving social demands (Dobbins, 2021; Graham, 1992; Hellerstedt et al., 2020; Nardini et al., 2020; Stryker, 2002). In response to the complex pressures, organizations relied on personnel experts to develop interventions and establish defensible legal standards demonstrating compliance. Some interventions drew inspiration from practices and processes employed during the industrial relations and unionization era (Dobbins, 2021;

Kochan & Cappelli, 1982), while others defaulted to mimetic approaches of copying the policies and processes employed by those organizations or federal agencies that appeared successful in achieving compliance to the satisfaction of the courts.

Moreover, a mixture of efforts from personnel workers, consultants, and scholars represents a group of stakeholder activists who actively worked to normalize the personnel field, standardizing its practices through professional associations and research, among other means.

Experts in the personnel field demonstrated adaptability in their strategies, introducing corporate compliance practices to shield organizations from legal and media scrutiny (Portocarrero & Carter, 2022). They reinvented existing personnel functions and designed and implemented new procedures and systems (Dobbins, 2009), including annual performance measures, benefit plans (e.g., health, insurance, pension), cost-of-living adjustments, formalized disciplinary actions, seniority-based promotion, layoff procedures, and third-party arbitration (Dyer & Burdick, 1998) to navigate the changing workplace environment. Thus, the imprints of academic theories, legislation, and antecedent personnel practice appear in corporate compliance codes, employee handbooks, compliance training programs, job descriptions, and disciplinary protocols, contributing to the field of Human Resource Management and, ultimately the work of DEI (Dobbins, 2009; Nkomo, 2019; Photocarrier & Carter, 2022).

Dobbins and Kalev (2013) and other scholars highlight the interventions employed within organizations. They underscore the pivotal role of personnel experts in wielding internal decision-making power and using strategies to navigate the intricate

challenges of aligning internal action with societal expectations while effectively

mitigating legal threats.

**Affirmative Action and EEO Interventions**

*Action Plans and Public Statements*

Plans for Progress gave birth to the development of internal procedures to

eradicate workplace discrimination. The practices of documenting internal goals to erase

workplace discrimination stood firm despite the dissolution of the Plans for Progress

Committee following activist scrutiny (MacLaury, 2010). By 2002, 90% of medium and

large organizations had explicit policies addressing racial and gender issues (Kalev et al.,

2006; MacLaury, 2010). The phrase "An Equal Opportunity Employer" became a joint

commitment in the Plans for Progress pledges, employee manuals, and job

advertisements.

*Recruiting Strategies*

Between 1965 and 1976, recruiting programs engaging black colleges and

organizations emerged. Among leading employers, the Bureau of National Affairs

reported a 31% increase in developing new recruiting systems to support black applicants

(Bureau of National Affairs, 1967; Dobbins & Kalev, 2013). By 2002, one in 10 top

organizations integrated measures to combat discrimination into their recruiting plans.

*Performance Evaluation*

Incorporating equal opportunity into performance evaluations became a strategy

to engage line managers. Modeled after merit-based union practices, personnel experts

adopted a system of rewards and penalties to encourage behavioral change (Dobbins &

Kalev, 2013). In 1973, 20 leading firms embraced this practice (Fretz & Hayman, 1973).

However, studies have revealed bias in these evaluations and their potential to create an appearance of meritocracy while undermining discrimination (Dobbins & Kalev, 2013).

### Job Descriptions, Ladders and Testing

Organizations, realizing the lack of structures for advancement, created job ladders to remove barriers that prevented blacks from progressing beyond entry-level positions. Additionally, personnel experts promoted the implementation of job descriptions following reports of the exclusion of blacks based on exaggerated education requirements (Boyle, 1973; Dobbins, 2009). By 1985, eight out of 10 firms implemented these practices (Dobbins, 2009).

The adoption of job testing received mixed reactions among organizations, especially after the Griggs v. Duke Power (1971) case, which ruled that discrimination might exist when assessing academic skills that did not directly relate to job performance. Personnel experts recommended that organizations only require such tests if appropriate validation ruling out biases had occurred. (Dobbins, 2009).

### Salary Classifications

A ranking system used for salary classifications, typically administered by managers, was introduced as a remedy against pay discrimination. However, studies showed that the real benefit occurs when no classifications exist (Elvira & Graham, 2002).

### Job Training

Organizations established programs that equipped marginalized communities with the skills necessary for job opportunities that were previously inaccessible (Dobbins &

Kalev, 2013). Initially inspired by wartime efforts to address workforce shortages, skills training changed nondiscrimination.

By 2002, a significant shift had transpired, with 60% of firms offering management training and 20% explicitly focusing on women and marginalized communities for inclusion in management training programs (Dobbins & Kalev, 2013).

### Compliance Training

Initially, compliance training convened employees to review a list of policies and regulations. During each session, participants were educated on appropriate workplace behaviors and made aware of unacceptable actions. After finishing the training, participants confirmed attendance by signing a statement of completion.

The training primarily focused on the underrepresentation of marginalized groups, leaving dominant groups feeling excluded. Participants perceived the training as endorsing an environment that condoned preferential treatment of one group over the other (Anand & Winters, 2008).

### Symbolic Structures

Even with the subsequent amendments to affirmative action and equal opportunity laws, the ambiguity of its intent sparked ongoing debates of contrasting perspectives. Two fundamental views emerged: procedural interpretation versus substantive understanding (Edelman 1990). Edelman (1990) further describes the result of such legal and social tensions, stating:

> As long as the debate is unresolved, organizations have wide latitude in
> determining how, if at all, to comply. Creating symbolic structures is especially
> attractive in this context: an organization can point to structural changes as

evidence of compliance without necessarily making significant changes in

behavior (p. 1408).

By 1980, discrimination lawsuits grew from a few hundred to approximately

5,000 annually (Burstein & Monaghan, 1986). These developments spawned a continuum

of recycling interpretation of the law, establishing internal compliance measures, and

presenting best practices to legal authorities as evidence of adherence to the law

(Graham, 1990; Kalev et al., 2006). These actions withstood legal scrutiny and

significantly influenced mainstream legal interpretations to develop standards matching

more closely with internal corporate policies (Blumrosen, 1965; Clune, 1983; Dobbins,

2009; Wirt, 2017).

**Corporate Response to Evolving Social Dynamics**

In the early 1980s, increased political challenges signaled waning attention to

affirmative action and the slowing down of equal opportunity progress. The rejection of

the conciliation agreement intended to reinforce existing non-discrimination laws further

validated declining government support (Blumrosen, 1993; Dobbins & Kalev, 2013;

McDowell, 1989; Portocarrero & Carter, 2021). While some companies diverted efforts

and resources from compliance training to other business areas (Anand & Winter, 2008;

Nikomo, 2019), others continued to evolve diversity training methodologies.

Another transformation occurred with the release of Johnston's (1987) Workforce

2000 report. The report projected an aging workforce composed predominately of racially

and ethnically disadvantaged populations and women. This forecast of new entrants

joining organizations gained the interest of professionals and scholars, generating

widespread conversation around diversity. "Organizations from the military services to

the trucking industry will be forced to look beyond their traditional sources of personnel. For well-qualified minorities and women, the opportunities will be unusually great" (Johnston, 1987, p. 195).

In anticipation of government reaction and the possibility of legislative changes that align with Johnston's report, stakeholders grounded in various disciplines, including social science, organizational psychology, organization development, lawyers, and others, developed new ideologies and practices (Brazzel, 2003; Edelman 2010, Zanoni, et al. 2010). A perspective advocating desegregation emerged from stakeholders, inspiring innovations transcending beyond compliance and training protocols. This logic reshaped the concept of diversity, emphasizing acceptance, assimilation, a celebration of differences, and appreciation of everyone (Brazzel, 2003; Zanoni et al., 2010).

With a focus on organizational learning and social justice, stakeholders began cultivating practices and training curriculums incorporating traditional and contemporary ideologies and methods (Brazzel, 2003). Workforce 2000 was pivotal in advancing compliance-based diversity to a more inclusive approach, prompted by the perceived need to manage the changing demographic. In describing this evolving workforce, Johnston (1987) introduced workplace diversity (Anand & Winter, 2008; Nkomo et al., 2019).

**Expanding Diversity to Diversity and Inclusion**

Thomas (1990) socialized Diversity Management and the notion of presenting a compelling business case for diversity, contributing to improved performance and bottom-line growth (Anand & Winter, 2008). Thomas (1990) wrote,

The goal should be to create an environment "where we are everyone." Thomas argued that something else besides affirmative action was needed. "That something else consists of enabling people, in this case minorities and women, to perform to their potential. This is what we now call managing diversity (p. 108).

Diversity represented the self-interest of organizations influenced by civil rights activists' demands and the women's liberation movement. Diversity Management drew attention to the currency of diversity centered on competitive advantage, economic gains, and outcomes (Garg & Sangwan, 2021; Thomas & Ely, 1996). With the growing acceptance of diversity and inclusion, organizations worked to embrace everyone (Anand & Winter, 2008; Thomas, 1990) by promoting actions that increase awareness and sensitivity toward differences among individuals. Organizations favoring this method created mechanisms to attract diversity (Zanoni et al., 2010) while opening access to opportunities, decision-making, and positions of power for the disadvantaged. They deployed interventions that fostered equality, justice, and full participation of individuals and groups (Holvino et al., 2004). Proponents of this approach adopted the expanded definition of diversity and inclusion that extends beyond race, gender, physical abilities, age, and sexual orientation. The definition encompasses differences in attitudes, values, beliefs, cultural styles, functional backgrounds, and cognitive styles. Some argue that this perspective offered a more intricate and adaptable application of diversity. Others claim the broader definition diluted the focus on issues related to gender and race (Oswick & Noon, 2014; Vaughn, 2007). Both philosophies significantly shaped organizational interventions and structural changes (Zanoni et al., 2010).

**Diversity and Inclusion Structural Changes and Interventions**

As a result of the many perspectives on managing the increasingly diverse workforce (Brazzel, 2003; Zanoni et al., 2010), some companies folded diversity management functions into their HR departments, sharing resources, historical policies, training, and procedures to advance marginalized communities (Anand & Winter, 2008). Others created separate divisions where personnel administration functions, such as evaluation and salary classifications, aligned to human resource management. In this structure, diversity management functioned as a discreet unit promoting diversity and inclusion (Dobbins and Kalev, 2013). New interventions emerge reflecting the tenets of Diversity Management.

*Networking and Mentorship Programs*

According to Dobbins and Kalev (2013), affinity or networking groups cultivated communities and forums within organizations to facilitate the exchange of information. Some organizations lobbied for formalized groups with dedicated support structures, including funding, meeting spaces, and other resources. Membership in such groups enhanced social capital and empowered advocacy for policy changes.

In addition, management psychologists advocated for mentoring programs to promote the advancement of disadvantaged groups. Individuals from marginalized backgrounds paired with volunteers to receive one-on-one coaching and guidance to obtain traditionally inaccessible roles and promotions.

*Task Force*

Personnel experts established committees and task forces with members from diverse personal and professional backgrounds across the organization (Nardini et al.,

2020). These task forces followed a precedent set by contractors in the 1960s to foster

workforce integration (Schofer, 1971). The diversity-oriented task forces created

platforms for individuals representing various facets of the organization to engage in

discussions, exchange ideas, and implement initiatives. According to a report by The

Conference Board in 1992, one-third of large corporations had such task forces in place.

### *Encounter Groups*

The military introduced encounter groups. The facilitation of these groups ranged

from assertive condemnation to harmonious acceptance and everything in between.

Delivery methods seemingly mirrored the training outcomes. Among white participants,

some found the training insightful, some left even more resistant, and others became

active advocates and supporters of efforts to dismantle racial injustices (Vaughn, 2007).

Corporations embraced similar training programs that primarily addressed issues

of race and gender discrimination to mitigate legal actions. However, this approach often

generated tension, fostering a zero-sum mentality where the exclusion of one group was

perceived as a preference for another, resulting in feelings of loss and gain among

participants (Vaughn, 2007).

Within more prominent corporations like Polaroid, Connecticut General Life

Insurance Company (CG), AT&T, Exxon, and Digital Equipment Corporation (Swanger,

1994), the disruptive nature of some affirmative action interventions nudged leaders to

seek external consultation. They turned to organization development practitioners,

consulting firms, and independent consultants to aid in the transformation of the

organization's culture (Katz & Miller, 2018).

**Evolution of Diversity and Inclusion Training**

Beginning in the 1960s, workshops on race relations evolved, focusing on heightening awareness and sensitivity towards issues of race. Initially, diversity training primarily entailed a review of acceptable and unacceptable workplace behaviors, and employees signed a completion acknowledgment at the end of each course. By the 1980s and 1990s, training related to DEI evolved into numerous offerings that varied among organizations (Anand & Winter, 2008).

*Bias and White Privilege Training*

Organizations added the topics of privilege and bias to the diversity training curriculum, such as white privilege, aimed to increase awareness of the inherent advantages of certain racial groups with greater social, political, and economic power. Additionally, unconscious bias training based on the principle that everyone possesses biases drew attention to the biases of employees and managers. The training sought to raise awareness and facilitate actions to modify biased-driven behaviors (Noon, 2018).

*Inclusivity and Multicultural Training*

From the 1990s to the present, diversity training has remained a prominent method for educating the workforce. The focus of diversity training gradually grew to encompass inclusion, adding new dimensions, including ability differences, ethnic groups, religion, and LGBTQ+ individuals (Anand & Winter, 2008). More recently, training programs emphasize multiculturalism, further expanding inclusivity to comprehend different identities and their intersections while illuminating the persisting effects of discrimination (Anand & Winter, 2008).

**Expansion to Women and Family Care Programs**

Addressing women's issues became a prominent agenda in the personnel field. Women held 50% of the personnel roles by the 1990s. Between 1972 and 1975, 45% of corporations had maternity leave policies to prevent pregnancy discrimination. Five states outlawed pregnancy discrimination between 1972 and 1982, and by 1993, federal laws were in place for maternity, paternity, and medical leave (Dobbins & Kalev, 2013).

**Managing Diversity in the New Millennium**

In the late 1990s-2000, corporations perused the profit-driven benefits of diversity, which fueled the growing prominence of diversity training and the diversity business case model. Amid societal pressures to address access and equity issues beyond mere quotas, scholars like O'Leary et al. (2006), Jones et al. (2013), Fine et al. (2019), and Van Dijk et al. (2012) critiqued this approach. Research by these scholars deems the prevailing bottom-line orientation of diversity initiatives inadequate in addressing ethical and moral imperatives. They contend that building a business case for diversity, primarily fixating on economic considerations, falls short of realizing the overarching objectives of civil rights legislation — specifically, in leveling the professional playing field for all employees with an approach characterized by fairness and equity.

Other scholars identified a contentious link between the business case and diversity training, noting resistance due to its perceived emphasis on economic justification (e.g., Avery & Thomas, 2004; Kaplan, 2006, 2020; Kidder et al., 2004; Weaver & Gingrich, 2005). Without empirical evidence supporting the efficacy of diversity training, scholars explore ways to review and decouple it from a singular focus on economic justification (Jones et al., 2013).

**Social Climate Change: Justice, Equity, and Social Responsibility**

In the early to mid-2000s, awareness arose around various social interests, with modern movements exploiting the power of social media. The #MeToo movement stood against the deep-rooted practices of excluding and marginalizing black women and women of color in the workplace. First coined by Tarana Burk, the movement entered the social media scene in 2007.

In 2017, a tweet from Alyssa Milano generated more than 12 million views on Twitter/X, Facebook, Snapchat, and other social media platforms combined in reaction to Milano's #MeToo challenge post. The convergence of the #MeToo movement with the overall feminist movement coincides with what Crenshaw (2013) describes as an aspect of the intersection of racism and sexism: a part of the lives of women of color that, in a sense, cannot be expressed by observing the dimension of race or gender as disparate experiences (Crenshaw, 2013; Onwuachi-Willig, 2018). In the broader context, the movement progressed to expose sexual harassment in the workplace, resulting in the firing, suspension, and resignation of executive-level, high-profile individuals based on accusations of misconduct by these individuals who worked in industries and corporations across the US (Wexler et al., 2019).

In 2012, the Black Lives Matter (BLM) Movement took seed after the acquittal of George Zimmerman for the murder of Trayvon Martin (Faust et al., 2019). In 2016, the movement peaked again during the NFL preseason when Colin Kaepernick, a San Francisco 49ers quarterback, remained seated and, in later games, took a knee instead of standing during the national anthem. In protest of oppression and police brutality, the movement spread to other areas of the sports world. Kaepernick donated millions to

support charitable endeavors to address racial issues (Faust, 2019). In 2018, Nike joined

forces with Kaepernick, supporting BLM activism against racial inequity and police

brutality (Kelly, M. 2020). The BLM movement initiated on social media continues to

maintain an online presence. Researchers analyzed over 40 million tweets, 100,000

websites, and 40 interviews of BLM activists in 2014 and 2015 (Freelon et al., 2016).

They found that right after the killing of Michael Brown, the volume of mentions of the

BLM movement spiked tremendously, with over 55 times more tweets and over 13 times

more unique users than before Michael Brown became a household name (Freelon et al.,

2016). There were 12,589,097 #BlackLivesMatter Tweets from August 9 to August 31,

2014 (Freelon et al., 2016). These scholars note that it was the online and in-person

protests around the death of Michael Brown that made BLM into a social movement

(Faust, 2019).

By 2020, as social activists of the millennium continued the mobilization, various

movements (Dreier, 2020; Taft, 2018) and the new entrants in the workforce began

forming a novel image around the expectations of the workplace. Employees wanted to

work for companies that embraced DEI with systems demonstrating a commitment to

supporting diversity of race, ethnicity, religion, abilities, genders, and sexual orientation.

They desire organizations with clear paths and action plans for dismantling systemic

racism (Giampetro-Meyer, 2023).

**A Call for Systemic Change in Corporate America**

At the onset of 2020, the nation grappled with the challenges posed by the

COVID-19 pandemic. Just three months later, the jolt of the widely broadcasted nine-

minute video capturing the brutal act of racism ending in the murder of George Floyd

permeated globally (Hill et al., 2020). The quick succession of these events heightened awareness of deep-seated systemic injustices, leading to a surge in activist protesting social inequities.

Responding to this heightened awareness, corporations covering various sectors in the United States pledged significant financial resources to address workplace inequalities. Katz and Miller (2021) acknowledged these noteworthy commitments, highlighting the need for time to reveal the extent of systemic changes within organizations:

> If we are to Make Systemic Change, the real need is to embark on a change strategy that recognizes how racism and other forms of oppression are baked into the organization and addresses these other systemic inequalities in all elements of the organization, both internally and in the organization's external relations and partnerships. These organizations have had a renewed sense of urgency and energy to address issues of racism in their culture, policies, and practices and have identified how the change efforts, which might have been programmatic in the past, connect strategically to the organization's mission, vision, and strategy (p. 16).

This study recognizes the freshness of these events and underscores the persistent need for early discoveries that deviate from the typical focus on legal frameworks. Over the past three years, scholarly attention has surged in the domain of the strategic integration of DEI and the role of leaders in this field. The following section highlights two examples of such studies.

Hogan et al. (2023) recognized COVID-19 and the BLM movement for exposing the lack of workforce diversity and systemic trends of inequities in healthcare systems impacting ethnic communities. Consequently, Hogan et al. (2023) advocated exploring methods to eliminate inequities through organizational change in the US healthcare system. From February 2022 to October 2022, the scholars interviewed 31 Diversity, Equity, Inclusion, and Belonging (DEIB) leaders to understand their role in implementing organizational interventions. They concentrated on five DEIB implementation strategies derived from Okumus (2003) Strategic Implementation Framework: people, health equity, monitoring and feedback, operational planning, and communication and external partners.

First, the study conceptualized DEIB as an organizational intervention and a deliberate, systematic organizational endeavor that effect changes addressing DEIB issues and enhances organizational performance. The study notes that organizational strategies and interventions are frequently used interchangeably (Hogan et al., 2023).

Second, based on the participants' responses, the study defined DEIB leaders as champions. These are senior executive roles assuming primary responsibilities in the formulation and execution of DEI interventions (Hogan et al.,2023; Yancy, 2023). During the interviews, DEIB Leaders stated that their primary responsibility was managing and driving all DEIB strategy efforts. They described how their healthcare delivery organization's board or CEO often hired them to lead DEIB work (Hogan et al., 2023). The designation of the champion amplifies existing literature on the vital importance of top-level leaders in a selected role to advance the implementation of evidence-based intervention (Hogan et al., 2023; Shi et al., 2017)

Third, the study produced an empirically developed list of DEBI strategy implementation spearheaded by top-level DEBI leaders (Hogan et al., 2023):

- People: DEIB leaders focus on building equity and inclusion within the organization through talent recruitment and retention, employee learning, employee resource groups, formal workforce development, new pipelines, and engaging top-level leaders.

- Health Equity: reduce disparities in clinical outcomes, access and patient experience, healthcare research, language translation service,

- Monitoring and Feedback: board engagement, DEIB Scorecard, listening sessions.

- Operational Planning and Communication: building collaboration to support sustainable change, developing DEIB personnel infrastructure, DEIB consultation to support DEIB Strategies

- External Engagement: Community engagement and supplier diversity

The study concluded discovering the effectiveness of the strategies and interventions identified were undetectable with variance in adoption across healthcare organizations. The research revealed some indications of siloes at the top of the organization. Observation of support for the strategies exists only in some organizational settings, presenting an opportunity to learn more about the collective work to support the Healthcare Organizations (HCOs). Additionally, the nine broad-spanning DEI responsibilities identified never included allocating resources to support the initiatives (Hogan et al., 2023).

Lastly, the use of the study's framework offers researchers and healthcare delivery systems leaders a way to evaluate effectiveness, understand and design the implementation of DEIB strategies, allocate organization resources, define the role of top-level leaders within the process, and troubleshoot and improve their current processes associated with adopting DEIB strategies/interventions.

Another study (Lamba et al., 2022) took place in New Jersey in the middle of the COVID-19 pandemic with a case study documenting lessons learned from DEI strategies on the Rutgers Biomedical and Health Science campus at Rutgers University. The campus serves a community of nearly 7,000 students and 1,572 full-time staff. With the support of the Vice Chancellor for Diversity and Inclusion and collaboration of the Diversity Council, the scholars delved into the experience of DEI initiatives employed to cultivate a culture of inclusion and strengthen employee resilience in a crisis.

The organization implements three core strategies with supporting initiatives applying the DEI Crisis Action framework (2020). The approach centered on one question: "How do we react with DEI awareness to demanding situations we have never encountered?" (Williams & Cooper, 2020). The alignment with Kotter's (2007, 2020) transformation steps for organizational change factored into this decision to use the Crisis Action Framework. The study focused on the first three of four strategies: culturally relevant decisions, supporting diverse communities, and communicating intentionally and inclusively as described in Table 2.

**Table 2**

*DEI Strategies, Lamba et al. (2022)*

| |
|---|
| **Strategy 1:** Make Culturally Relevant Decisions |
| • Strong and early messaging by top leaders addressing professionalism, compassion, and tolerance for bias to set the bar for the mission. |
| • Send a guidance document that discusses values and provides ways to create an inclusive environment. The document includes treating everyone with respect and serves to denounce and discourage xenophobia, bigotry, and racism. |
| • The guide includes practical examples, such as how technology limitations might impact patients, and emphasizes the attention needed from employees to avoid microaggressions in these situations. |
| • Allocate funding to support DEI efforts, including translators, social science pilot programs, and research centers addressing health disparities. |
| • Provide generous gifts to support students with limited resources (laptops, WIFI, financial aid). |
| • Develop a knowledge repository of webinars and literature offering solutions for mitigating implicit biases. |
| • Mitigate mass layoffs, hiring freezes, and furloughs by instituting a partial furlough shared by all employees and administrators for one week every nine weeks to prevent layoffs. |
| • Implement intentional efforts around diverse hiring and training to prevent unconscious interview bias. |
| **Strategy 2.** Building and Supporting Diverse Digital Communities. |
| • Make staying connected weekly a top priority through the We-Meet (Webex, Meeting Everyone, Exchanging Topics) open office sessions with senior leadership. |
| • Monthly cafés are administered for affinity groups, including faculty, faculty of color, and staff, recognizing an underserved group. From these initial groups, the Women and Gender Equity Council, Racial Healing Circle, and Staff Mentoring Program developed. |
| • A wellness effort, "Check You Check Two," was initiated to check in on two colleagues daily. |
| **Strategy 3**. **Communicate and connect thoughtfully and inclusively** |
| • Celebrating the launch of real-life faces and stories in 55 words, sharing experiences through HERE 4 U on social media in collaboration with a university-wide effort. |
| • Leader advocacy is integral to the success of DEI. |
| • Thoughtful consideration of stakeholders is essential to building community, cultivating allyship, mitigating digital bias, allowing for flexibility, and respecting the intersectionality of the various roles that members are playing during the pandemic**.** |

In conclusion, everyone must feel included in an environment of respect and belonging in uncertain times (Planz et al., 2020). Intentionality and collaborative strategies are essential to build community during disruptive distances like the pandemic. Decisions should be inclusive and anchored in DEI mission-critical values, which are more critical in the ups and downs of the national pandemic. The framework produced in this study pinpoints principles of putting people first, building a community of belonging, respecting intersectionality, allowing for flexibility, cultivating allies, mitigating bias, and making representation matter for implementing their DEI strategy.

**Summary of Literature Review**

The literature review revealed the complex and multi-dimensional nature of DEI. The review initially provided a historical reflection on the evolution of DEI before delving into contemporary social movements and studies of novel DEI strategies. While the early body of literature portrayed social movements as catalysts or tipping points, creating awareness, and influencing the urgency for change, research indicated a tendency to rely heavily on legal frameworks when examining the factors driving DEI-related change. Further exploration beyond this connection has largely been overlooked.

More research is necessary to comprehend the systemic integration of DEI principles and the impact of social conditions. According to Edelman et al. (2010), social movements and organizations remain underrepresented despite ongoing research. Recent studies on the strategic integration of DEI in the literature, like Hogan et al. (2023) and Lamba et al. (2022), aim to address these voids, provide new insights, frameworks, strategies, and interventions supporting DEI.

The current study contributes to the expanding literature on the strategic integration of DEI, considering the social climate context. The research approach leverages a socio-technical framework to identify recurring themes that integrate with the organization's strategy and all design components (i.e., strategy, structure, people, process, technology). It intends to offer meaningful insights that aid in comprehending the conditions of DEI in organizations and the challenges and opportunities involved with implementing systemic improvements.

Integrating DEI into an organization's design to achieve systemic change is a complex transformation requiring alignment of all organization components. The STS

framework accounts for the dynamic relations among the myriad systems that might be affected by changes of this magnitude. Hackman (1980) emphasizes that organizations are embedded in and affected by an outside environment. Fundamentals constitute the cultural values that specify how organizations should function and generally accepted roles that individuals, groups, and organizations are expected to play in society. Thus, there is a constant interchange between what goes on in any given work organization and what goes on in its environment. This interchange must be carefully attended to when work systems are designed or changed (Davis & Trist, 1974; Hackman, 1980).

Applying the Star Model™ (Kate & Galbraith, 2007), the data analysis explored five fundamental organization components: strategy, structures, people, processes, and technology. While the modified model replaces "Rewards" with "Technology" for this study, it maintains the intent of the original categories to obtain a comprehensive understanding of DEI within organizations.

"Strategy" provides insight into an organization's mission, goals, values, and strategic product and service delivery decisions. It also examines what distinguishes the organization from its competitors.

Learning where the power dynamics exist within an organization, "Structures" illustrate how companies internally organize in size, specialization, autonomy, and power distribution within each unit or department. The design of these structures intentionally facilitates various functions, products, workflow processes, markets, and customer interactions.

"People" refers to the human resource policies that shape the perspective and competency of the workforce.

"Processes" intersect across these structures, encompassing the management processes that require resources to support the organization's operations. The process component of the organization entails setting operational priorities, resource allocation, and management processes essential to the effective functioning of the organization "

"Technology" was crucial for inclusion in this analysis, as it interfaces with all organizational components. Given the recent workplace challenges driving the advancement and increased use of technology, I believe this is an area worth incorporating to understand the role of technology in DEI comprehensively.

DEI operates within an organization field, the DEI field, and the social field (external and internal environments), requiring deliberate choices and trade-offs in their interactions. Additionally, the organization's complex nature demands harmonizing its components to attain effectiveness. Overemphasizing one aspect can cause an effect on other components, serving as indicators of change or imbalances. When considering DEI as an essential function ingrained within the organization, understanding the conditions requires insights from the fields with a thorough evaluation of each facet of the organization's design.

Figure 1 depicts the organization's core as its design, which comprises interacting parts influencing and impacting the organization field. As a field, DEI navigates both inside and outside the organization field, interacting with the external forces of the social field. The organization, DEI, and social fields are distinct, coexistent, and integrated. The interconnectedness of these fields plays into the decision-making, tradeoffs, and changes associated with the functioning of DEI in organizations and the resulting outcomes of behaviors, culture, and performance.

**Figure 1**

*Modified Star Model*
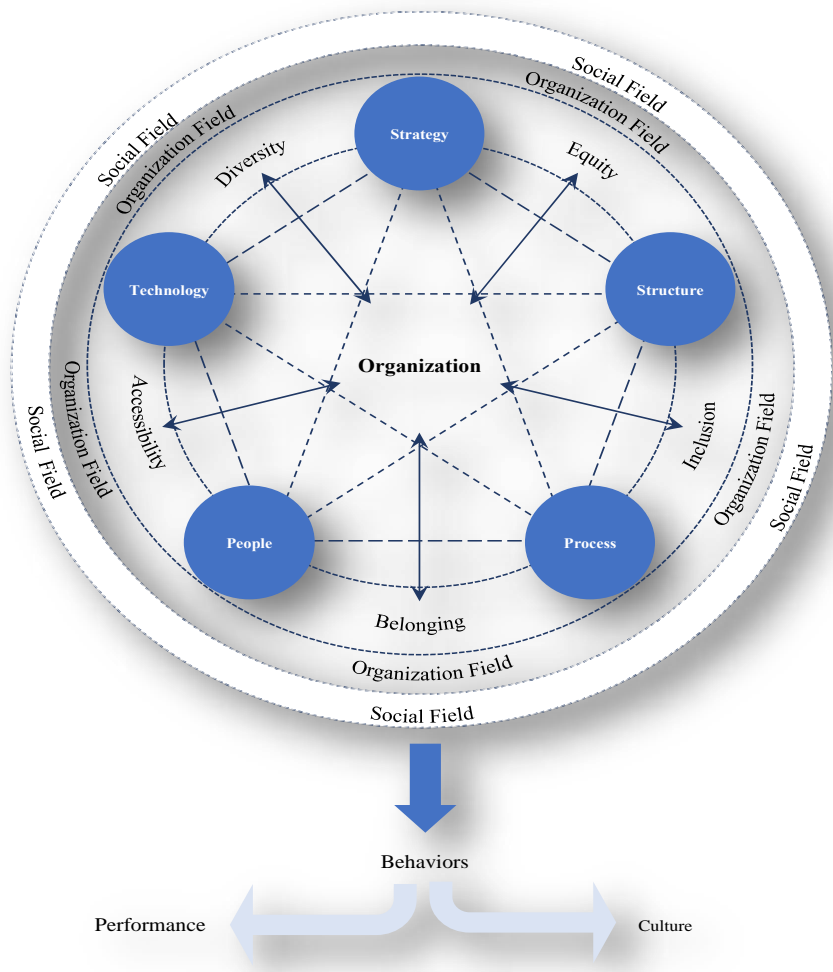


This theory supports the research methods applied in this study, examining social climate in context with the functioning of DEI within the organization design to learn about the changes and outcomes associated with integrating DEI.

**Chapter 3: Research Methodology**

Considering antecedent research, this study investigates the condition of DEI in organizations and the impact of social climate. The qualitative method chosen was particularly pragmatic in creating the flexible research design needed for this study (Creswell, 2003). I conducted nine interviews eliciting the perspective of DEI leaders performing similar organizational roles. As new insights surfaced during the interview, the researcher tailored the study design. The interview modification included probing questions to facilitate deeper exploration of specific topic areas. The resulting data represents the observations and experiences of the experts interviewed (Creswell, 2003).

**Participant Populations**

The participant pool comprises a purposeful sampling of nine professionals selected based on comparable experiences and the predetermined study criteria: at least 20 years old, US-based work, serve as a DEI leader with at least two or more years of experience overseeing DEI efforts were identified and selected through educational, professional, and personal networks and participant referrals.

Invites sent to over 40 individuals yielded 13 responses. Of the 13 responses received, three individuals were unavailable during the study timeframe and one declined participation. Nine participants met the study criteria and were available to participate. The original 30-day period allotted for virtual interviews was extended to over 60 days, which provided the flexibility to accommodate scheduling constraints.

**Demographics**

Given the range of professional titles in the DEI field, it is necessary to mention that leadership titles can include the Chief Diversity Officer (CDO), Head of Diversity,

and Director of Diversity. To maintain consistency, the DEI Advisors, Consultants, Managers, and Vice Presidents participating in this study are referenced throughout this narrative as DEI leaders or experts.

The DEI leaders included in the study have oversight responsibilities with engagement over some, if not all, principal aspects of their organization's DEI function. Eight participants disclosed working with multiple organizations. Moreover, a subset of five individuals included commented on their involvement in delivering independent consulting services or engaging in community-based DEI work. Additionally, one participant operates exclusively as an independent consultant.

The study attracted DEI leaders representing five discrete industries: international development, professional service-firm consulting, financial banking, independent consulting, and health care. In total, there were two men and seven women. Table 3 highlights the participants titles and tenure.

**Table 3**

**Participant Titles and Tenure**

| Randomized Participants No. | Professional Titles | *N=9* Years in the DEI Field | Years in Current Role | Academic Experience | Experiential Training |
|---|---|---|---|---|---|
| *01* | Director of DEI | 6 | 2 | Yes | Yes |
| *02* | DEI Consultant | 20 | 4 | Yes | Yes |
| *03* | Director of DEI | 7 | >1 | - | - |
| *04* | Independent Consultant | 20 | 5 | Yes | Yes |
| *05* | Sr. V.P. of DEI | 7 | 4 | Yes | Yes |
| *06* | Sr. V.P. of H.R. and Director of DEI | 2 | 2 | Yes | Yes |
| *07* | Sr. VP DEI | 6 | - | - | - |
| *08* | DEI Manager | 5 | 1.5 | - | - |
| *09* | DEIA Advisor | 10 | 1 | Yes | Yes |

**Data Collections**

The interview phase spanned the period of May 2023 to July 2023. The study used tailored interview questions derived from the STS framework, an intervention strategy for organization development and change (Appelbaum, 1997). The adaptability and versatility of this framework in assessing organization systems apply to virtually any organization situation (Hackman & Oldham, 1980). This open-ended style of inquiry accommodated the view of organizations as a dynamic combination of technical and social components openly interacting within an organization setting, working collaboratively to optimize tasks, products, and outcomes (Appelbaum, 1997).

The format facilitated the incorporation of probing questions (Creswell, 2013) across topics, provoking deeper exploration. This approach sets the stage to tune into various aspects of the organization and its connection with the social climate to comprehend DEI conditions at the organizational level.

**Interview Procedures**

The interview phase began with an initial outreach email to potential participants found through professional contacts, LinkedIn, and referrals. The invitation email explained the study's purpose and confidentiality procedures. Additionally, I delivered a preview of the interview questions beforehand, offering insight into the type of inquiry posed during the interviews.

Each interview lasted an average of 43 minutes. Each interview started with me reiterating the study's objectives and participants discussing their background regarding DEI. I encouraged participants to share their relevant experiences and interests. I requested permission to begin audio recording after the introductions to ensure the

participants' full attention. Notably, three interviewees chose to keep their video cameras on, and I reciprocated by remaining visible on camera, establishing a sense of comfort and trust throughout the data collection process.

Before starting the discussions, I encouraged participants to reflect on the influence of social climate on DEI within their organization when sharing their observations. As expected, the open-ended nature of the inquiries often yielded responses that addressed multiple topics simultaneously. Therefore, I adjusted the questions during the interview to account for apparent redundancies. Figure 2 presents the sample research inquiry design and the predetermined categories for this study.

**Figure 2**

*Research and Interview Questions*
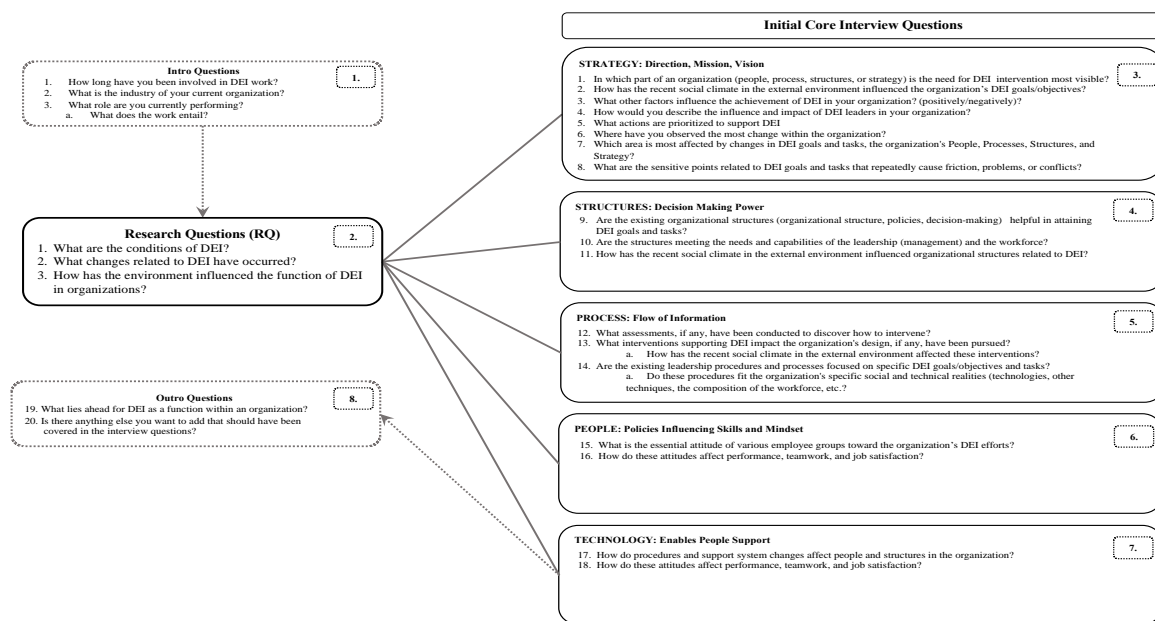
**Data Collection**

The STS framework aided the collection and organization of the interview data. The core segment of the interview consisted of 20 open-ended questions based on Appelbaum's (1997) diagnostic framework. Figure 2 illustrates the alignment among the research questions, interview questions, and predetermined categories. The study applied the STS frameworks to collect, organize, analyze, and drive inferences from the data. This approach asserts that Socio-technical organizations constitute a synergy of social and technical parts aligned to produce products and social or psychological outcomes.

Optimal outcomes become achievable when directing attention to all segments in designing work and when boundaries develop to shield organizations from "external disruptions while facilitating the exchange of necessary resources and information" (Appelbaum, 1997, p. 453). These STS tools offer diagnostics and intervention strategies to bring about future change. The interview questions mapped to the research questions, as shown in Figure 2, facilitate data collection to understand the state of DEI in organizations based on the STS principles.

Furthermore, the interview questions promoted open communication and encouraged participants to express their perspectives and insights based on their experiences. The order and phrasing of the questions enabled flexibility in the flow of the conversation to avoid a singular focus on a particular topic. The arrangement of questions facilitated the effective categorizing of the data and mapping of the research question.

Following each interview, I expressed gratitude to the participants and a promise of notification upon publishing the study. All interviews were audio recorded and transcribed by a professional automated transcription service.

**Data Analysis**

Throughout the analysis phase, themes emerged within the predetermined data categories based on participant responses. The data collected after each interview underwent a comprehensive examination, identifying information reflective of various parts of the organization and offering a broad perspective on the state of DEI. Guided by Braun and Clarke's (2006) six-step thematic analysis process, the research followed a recursive practice of scanning and comparing the data, looking for similarities, and discriminating elements to uncover patterns as outlined in the steps in Table 4.

**Table 4**

*Analysis Process*

| Guided by Braun and Clarke's (2006) Six-step Thematic Analysis Process |
|---|
| **Step 1.** Collect the data. Captured and organized the audio recordings and transcribed interviews. |
| **Step 2.** Comprehend the Data. Reviewed the data to understand the responses collected during the participant interview. |
| **Step 3.** Generate initial codes. Identify common words and phrases in the data captured for each interview. |
| **Step 4.** Formulate conceptual themes. Initiate the iterative process of clustering pieces of data. Performed a comparative analysis across the entire dataset. |
| **Step 5.** Define overarching themes. Determined themes, patterns, and quotes relevant to the research questions and literature review. |
| **Step 6**. Report the findings. The final report comprises the salient themes, frequency analysis, and results narrative. |

At the end of each interview, I cross-checked transcripts, notes, and recordings to ensure completeness and to develop a general understanding of the data. Each transcribed document received a label with the interview date, time, and a randomized participant number for confidentiality, identification, and retrieval. This process consisted of listening to the audio recording while reading the transcripts and comparing notes captured during the interview. Next, I examined the data for standard articles, such as words, phrases, and quotes within each interview transcript, to begin the coding process. The data was transferred to a Microsoft Excel spreadsheet after gathering thematic elements noted by hand on the hardcopy transcripts. I logged each identified code under the relevant predetermined category, creating a data repository as shown in Table 5. As

commonalities in the data surfaced, I reviewed the information, mapping the themes to relevant quotes and producing the preliminary data analysis results.

**Table 5**

*Data Collection Repository*

| Sample Data Collection Repository | | | | | | |
|---|---|---|---|---|---|---|
| **Strategy** | | | | | | |
| Participants | 1. In which part of an organization (people, process, structures, or strategy) is the need for DEI intervention most visible? | Open Code All four=2, People=6, Structure=1,Process=2 | Quotes | 2. How has the recent social climate in the external environment influenced the organization's DEI goals/objectives? | Open Coding: Changing discourse=3,Propelled Structural Change= 3, Pressure to respond=2 | Quotes |
| 003-007 | So this was tough for me because it's easy to say which one was least important for visibility. And I was strategy. And so what I was stuck is between the people and process because the people need to feel it. So they need to see representation, they need to see leadership and feel like leadership is listening or with those interventions, right? But at the same time that the process is sort of our people, whether no matter what level of leadership they're at, they need to see the things that are happening. So the interventions that the conversations, the trainings, whatever they are, even the responses to tragedy in the world or in their communities, those are processes that they need to see on a regular basis on the calendar. Things like that. So there are people and those processes that are involved in them. So I guess there would be a tie, but none of that stuff happens without people, right? And without the team members and the staff, the C suite leaders, all of us are human beings, and having this experience together. So without that, without us being involved in its all of us and being held accountable to it, it doesn't matter. It doesn't give those away. All right. | People Process Acceptance | ...none of that stuff happens without people, right ...the process is sort of our people No  matter what level of leadership they're at, they need to see the things that are happening. So the interventions that the conversations, the trainings, whatever they are, even the responses to tragedy in the world or in their communities, those are processes that they need to see on a regular basis on the calendar. | Almost all of it. It's not positive. It's not always positive. And it's not only so effective that it causes folks to do to do something about it. So there's a lot of fear of monitoring that comes from the external environment. Sometimes a little bit of fear can make people do things that are positive, right? So a lot of organizations, especially in 2020, 2021, they turn their social media black and they started promising money was going to go to certain organizations and they were going to change their supplier vendor vendor supplier practices because they were afraid that if they didn't, all of their constituents or the folks that they were hoping to connect to in the market, we're going to see them as fake or is not part of as part of the problem. And so they reached out in that way. Much of that has dissipated since 2021. And so that is clear that that was kind of false or there's certainly there wasn't anything that was really angry in that way. The other thing is possible too though. There are especially in the nonprofit space where nonprofits depend on funders and fundraising. That's so much of the money, especially here in the United States. It's much of the money that is raised in philanthropy is wrapped up in family money or money that has been amassed. Well, that has been a mask. In the capitalistic way and is tied to dehumanization and continues to be that then when you go and you say that we are going to focus on humanization and equity, those organizations are going to go, well, we don't believe in that. And we're going to take our money from it... | Pressure to Respond Fear Inspiration Not Positive Risk | |
| 001-009 | Currently People. Structure we are doing a decent job, ensuring resumes are free of bias. Working on hiring and interview processes. 49% of our new hires in 2022 where people of color and so I feel good about some of those systems we're looking at our merit, our performance increases, those processes, strategy we have a strategic plan that is guiding us we had over a hundred people in the organization contribute in some form or fashion to the strategic plan. Some of it is all the way form adamant, disdained, or these efforts people say this is political. We shouldn't be engaging in political things, to the people that are like where do I sign up? Sign me up for everything. I want to be involved, I want to be engaged.  And Everywhere between, the greatest gap that I see iin that between area is the portion of the population that in their heart of hearts don't want to be racist, don't want to be sexist, don't want to be transphobic. But doesn't know what that means and  are afraid to engage out of --allow to be a part of this ERG if I don't have this identity. So instead of leaning in to engage it's easier to disengage. So I don't think that subset of people don't believe in the value of it but are afraid for a variety of reasons to lean in and show up an dig in. And it's easier not to engage. | People Acceptance | People is where we have the greatest opportunity. Structure we are doing a decent job, ensuring resumes are free of bias. Working on hiring and interview processes. 49% of our new hires in 2022 where people of color and so I feel good about some of those systems we're looking at our merit, our performance increases, those processes, strategy we have a strategic plan that is guiding us we had over a hundred people in the organization contribute in some form or fashion to the strategic plan. Doesn't know what that means and  are afraid to engage. So instead of leaning in to engage it's easier to disengage. So I don't think that subset of people don't believe in the value of it but are afraid for a variety of reasons to lean | Potentially, very similar to maybe other organizations that you've talked to is the murder of George Floyd propelled are then CEO to say, are we doing enough? And it was very evident in their conversations. They weren't doing enough. [not] Enough around, I would say, the structure and the strategy. And so for sure, the social climate has been a propelling you know event. Now politically on the other side of that people will send anonymous messages through our ethics hotline you know to indicate that they feel like they're being discriminated against as a white male or this is political and we shouldn't be talking about politics. And so I do see sometimes us being cautious and hesitant in terms of how to proceed because of the social and political environment that we sit in. And because we're a government entity and agency, there's also that at play. And so when we think about, for example, faith based ERGs or religion, there are because of our state statute political subdivision sort of status. We can't be talking about certain things. We can't be engaging in certain things. And I think that we've seen from both sides that what's happening socially... | Changing Discourse Pressure to Respond (GF) Pressure not to respond Propelled  Strategy and Structures (preGF) Politicizes DEI | George Floyd propelled are then CEO to say, are we doing enough? Politically people will send anonymous messages through our ethics hotline you know to indicate they feel like they're being discriminated against as a white male and this political and we shouldn't be talking about politics. Sometimes I do see us being cautious and hesitant in terms of how to proceed because of the social and political environment that we sit in- because we are a government entity and agency we can't engage  or talking about  certain things because of our state astute and sort of the political subdivision status Nationally is what's happening socially... |

Iterating the six-step process, I scrutinized, compared, and contrasted data to discern common themes and patterns. Subsequently, I enhanced and consolidated initial research codes utilizing the Microsoft Excel Data Analyzer, automating the analysis of theme frequencies within predetermined categories and the associated interview questions (Tables 6-8). The data saturation point was reached at three or more responses (shown below the broken line in Tables 6-8 and, in one instance, two or more (Table 7, Theme 6). Thus, themes mapping to one-third or more responses are detailed in Tables 6-8, annotated with an asterisk denoting the top themes in each subset.

# Table 6

## *Thematic Coding, Strategy Themes 1-4*

| Research Themes | | | | | | | |
|---|---|---|---|---|---|---|---|
| Strategy | | | | | | | |
| 1.Greatest need (N=9) | Frequency | 2.Social influence (N=8) | Frequency | 3.Other influence factors (N=9) | Frequency | 4.Leadership influence( N=9) | Frequency |
| People * | 6   28.57% | Decision making* | 7   17.50% | Expectations-employee* | 5   8.20% | Executive-sponsorship* | 6   9.23% |
| Acceptance* | 4   19.05% | Changing conversations | 5   12.50% | Media | 4   6.56% | Risk adverse | 3   4.62% |
| Integration | 3   14.29% | Constraints | 5   12.50% | Climate-economic | 4   6.56% | Commitment-active | 3   4.62% |
| Process | 2   9.52% | Climate-political | 3   7.50% | Varied perspectives | 3   4.92% | Commitment-passive | 3   4.62% |
| Structures | 2   9.52% | Media | 2   5.00% | Alienation | 3   4.92% | Structures | 2   3.08% |
| Policies | 2   9.52% | Structures | 2   5.00% | Engagement | 3   4.92% | Resistance | 2   3.08% |
| Awareness | 1   4.76% | Strategy | 2   5.00% | Education | 3   4.92% | Business case | 2   3.08% |
| Equity | 1   4.76% | Expectations-employee | 2   5.00% | Acceptance | 3   4.92% | Training | 2   3.08% |
| **Grand Total** | **21**   **100.00%** | Policies | 1   2.50% | Engagement-executive | 2   3.28% | Add-on | 2   3.08% |
| | | Negative | 1   2.50% | Resources | 2   3.28% | Constraints | 2   3.08% |
| | | Stakeholder | 1   2.50% | Communication | 2   3.28% | Commitment-leadership | 2   3.08% |
| | | Constraints | 1   2.50% | Decision making | 2   3.28% | DEI roles | 2   3.08% |
| | | Polarized | 1   2.50% | Retention | 2   3.28% | Inconsequential | 2   3.08% |
| | | Inspiration | 1   2.50% | Awareness | 2   3.28% | Decision making | 1   1.54% |
| | | Risk adverse | 1   2.50% | Growth structures | 2   3.28% | Strategy | 1   1.54% |
| | | Leadership | 1   2.50% | Expectations-community | 1   1.64% | Priorities | 1   1.54% |
| | | Awareness | 1   2.50% | Political | 1   1.64% | Anti DEI | 1   1.54% |
| | | Education | 1   2.50% | Media | 1   1.64% | Decision making | 1   1.54% |
| | | Advocates | 1   2.50% | Workload | 1   1.64% | Education | 1   1.54% |
| | | Fear | 1   2.50% | Engagement-leadership | 1   1.64% | Political | 1   1.54% |
| | | **Grand Total** | **40**   **100.00%** | Climate-industry | 1   1.64% | Engagement-customer | 1   1.54% |
| | | | | Climate-internal | 1   1.64% | Accountability | 1   1.54% |
| | | | | Strategy | 1   1.64% | Engagement-executives | 1   1.54% |
| | | | | Political | 1   1.64% | Structures-CDO Support | 1   1.54% |
| | | | | Commitment Passive | 1   1.64% | Executive-coaching | 1   1.54% |
| | | | | Recruiting | 1   1.64% | Voice | 1   1.54% |
| | | | | Awareness-regional | 1   1.64% | Board commitment | 1   1.54% |
| | | | | Engagement-middle management | 1   1.64% | Policies | 1   1.54% |
| | | | | Leadership-empowered | 1   1.64% | Hustle culture | 1   1.54% |
| | | | | Litigation | 1   1.64% | Power | 1   1.54% |
| | | | | Vision | 1   1.64% | Zero sum | 1   1.54% |
| | | | | Hiring | 1   1.64% | Pro DEI | 1   1.54% |
| | | | | Hustle culture | 1   1.64% | Acceptance | 1   1.54% |
| | | | | Expectations-customer | 1   1.64% | Coersion | 1   1.54% |
| | | | | **Grand Total** | **61**   **100.00%** | Middle management | 1   1.54% |
| | | | | | | Constraints | 1   1.54% |
| | | | | | | Middle management | 1   1.54% |
| | | | | | | Structures-not HR | 1   1.54% |
| | | | | | | Moral imperative | 1   1.54% |
| | | | | | | Values | 1   1.54% |
| | | | | | | People centered | 1   1.54% |
| | | | | | | Workload | 1   1.54% |
| | | | | | | Performative | 1   1.54% |
| | | | | | | Persuasion | 1   1.54% |
| | | | | | | Interpersonal work | 1   1.54% |
| | | | | | | **Grand Total** | **65**   **100.00%** |

**Table 7**

*Thematic Coding, Strategy Themes 5-7, Structure Theme*

| Research Themes | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Strategy Con't | | | | | | | | | Structure | | |
| 5.DEI priorities (N=8) | Frequency | | 6.Observable change (N=9) | Frequency | | 7. Sensitive points(N=6) | Frequency | | 8. Usefulness of DEI Structures (N=7) | Frequency | |
| Retention* | 3 | 6.52% | Structures* | 5 | 26.32% | Fear* | 4 | 10.53% | Integration* | 3 | 6.82% |
| Hiring* | 3 | 6.52% | Process | 2 | 10.53% | Resistance* | 3 | 7.89% | Performative* | 3 | 6.82% |
| Strategy | 2 | 4.35% | Women's rights | 1 | 5.26% | Acceptance* | 3 | 7.89% | Work in progress* | 3 | 6.82% |
| Meaning making | 2 | 4.35% | Openness | 1 | 5.26% | Integration | 2 | 5.26% | Strategy | 2 | 4.55% |
| Interventions | 2 | 4.35% | Discrimination | 1 | 5.26% | Contagion | 2 | 5.26% | DEI roles | 2 | 4.55% |
| Equity | 2 | 4.35% | Microaggression | 1 | 5.26% | Political | 2 | 5.26% | Incongruent | 2 | 4.55% |
| Awareness | 2 | 4.35% | External focus | 1 | 5.26% | Constraints | 2 | 5.26% | Engagement-leadership | 2 | 4.55% |
| Training | 2 | 4.35% | Positive | 1 | 5.26% | Meaning making | 2 | 5.26% | Jaded | 1 | 2.27% |
| Different goals | 2 | 4.35% | Individual change | 1 | 5.26% | Awareness | 1 | 2.63% | Business outcome | 1 | 2.27% |
| Acceptance | 2 | 4.35% | Communication | 1 | 5.26% | Voice | 1 | 2.63% | Reactive | 1 | 2.27% |
| Integration | 2 | 4.35% | Strategy | 1 | 5.26% | Structures | 1 | 2.63% | Climate-social | 1 | 2.27% |
| Recruiting | 1 | 2.17% | Influencer | 1 | 5.26% | Meaning making | 1 | 2.63% | Change signals | 1 | 2.27% |
| Performative | 1 | 2.17% | Acceptance | 1 | 5.26% | Complex | 1 | 2.63% | Conceptual | 1 | 2.27% |
| Structures-CDO support | 1 | 2.17% | Meaning making | 1 | 5.26% | Education | 1 | 2.63% | Blind spots | 1 | 2.27% |
| Education | 1 | 2.17% | **Grand Total** | **19** | **100.00%** | Engagement | 1 | 2.63% | Constraints | 1 | 2.27% |
| Professional development | 1 | 2.17% | | | | Policies | 1 | 2.63% | Risk adverse | 1 | 2.27% |
| Engagement | 1 | 2.17% | | | | Engagement | 1 | 2.63% | Accountability | 1 | 2.27% |
| Constraints | 1 | 2.17% | | | | Religion | 1 | 2.63% | Trust | 1 | 2.27% |
| Business imperative | 1 | 2.17% | | | | Expectations-customers | 1 | 2.63% | Demographics | 1 | 2.27% |
| DEI roles | 1 | 2.17% | | | | Structures | 1 | 2.63% | Benefits | 1 | 2.27% |
| Celebrating | 1 | 2.17% | | | | Expectations-employee | 1 | 2.63% | Disengaged | 1 | 2.27% |
| Political | 1 | 2.17% | | | | Training | 1 | 2.63% | Measurements | 1 | 2.27% |
| Change | 1 | 2.17% | | | | Zero sum | 1 | 2.63% | Efficacy | 1 | 2.27% |
| Protection | 1 | 2.17% | | | | Bureaucracy | 1 | 2.63% | Persuasion | 1 | 2.27% |
| Commitment | 1 | 2.17% | | | | Alignment | 1 | 2.63% | Engagement | 1 | 2.27% |
| Resistance | 1 | 2.17% | ` | | | Innovation | 1 | 2.63% | Resources | 1 | 2.27% |
| Litigation | 1 | 2.17% | | | | **Grand Total** | **38** | **100.00%** | Acceptance | 1 | 2.27% |
| Creating opportunity | 1 | 2.17% | | | | | | | Skillset | 1 | 2.27% |
| Compliance | 1 | 2.17% | | | | | | | Engagement-passive | 1 | 2.27% |
| Structures-Support | 1 | 2.17% | | | | | | | Structures-not HR | 1 | 2.27% |
| Media | 1 | 2.17% | | | | | | | Equity | 1 | 2.27% |
| Add-on | 1 | 2.17% | | | | | | | Career path | 1 | 2.27% |
| Middle management | 1 | 2.17% | | | | | | | Expectation-employee | 1 | 2.27% |
| **Grand Total** | **46** | **100.00%** | | | | | | | Auditors | 1 | 2.27% |

**Table 8**

*Thematic Coding, Process, People, Technology, and Overarching Themes*

| Research Themes | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Process** | | | **People** | | | **Technology** | | | **Overarching Themes** | | |
| 9.Assessments HR data (N=8) | Frequency | | 10.Attitude toward DEI (N=7) | Frequency | | 11.Impact of Technology N=5 | Frequency | | 12. All Data Snapshot | | |
| Assessments (group/individual)* | 4 | 13.79% | Positive * | 4 | 8.33% | Data Analysis* | 3 | 10.00% | Engagement | 20 | 4.54% |
| Focus group* | 3 | 10.34% | Training* | 3 | 6.25% | Hiring* | 3 | 10.00% | Structures | 18 | 4.08% |
| Surveys * | 3 | 10.34% | Next level | 2 | 4.17% | Negative | 2 | 6.67% | Acceptance | 15 | 3.40% |
| Sourcing | 1 | 3.45% | Actively engaged | 2 | 4.17% | Safety blanket | 2 | 6.67% | Constraints | 14 | 3.17% |
| Pay audits | 1 | 3.45% | Positive | 2 | 4.17% | Positive | 2 | 6.67% | Strategy | 11 | 2.49% |
| Interventions | 1 | 3.45% | Awareness | 2 | 4.17% | Connection | 2 | 6.67% | Expectations | 11 | 2.49% |
| Demographics | 1 | 3.45% | Vulnerable | 2 | 4.17% | Recruiting | 2 | 6.67% | Decision making | 11 | 2.49% |
| Performance evaluations | 1 | 3.45% | Maturity | 2 | 4.17% | Philosophy | 1 | 3.33% | Awareness | 10 | 2.27% |
| ERG feedback | 1 | 3.45% | Middle management | 2 | 4.17% | Inclusivity | 1 | 3.33% | Integration | 10 | 2.27% |
| Strategy | 1 | 3.45% | Power | 1 | 2.08% | Digital Equality | 1 | 3.33% | Commitment | 10 | 2.27% |
| Exit interviews | 1 | 3.45% | Trust | 1 | 2.08% | Equity | 1 | 3.33% | **Grand Total** | 160 | 29.48% |
| Labor pool | 1 | 3.45% | Support | 1 | 2.08% | Digital Accessibility | 1 | 3.33% | | | |
| External consultants | 1 | 3.45% | Equity | 1 | 2.08% | Recruiting | 1 | 3.33% | | | |
| Pay audits | 1 | 3.45% | Engagement | 1 | 2.08% | Pitfalls | 1 | 3.33% | | | |
| Constraints | 1 | 3.45% | External expert | 1 | 2.08% | Artificial Intelligence | 1 | 3.33% | | | |
| Philanthropy | 1 | 3.45% | Resources | 1 | 2.08% | Education | 1 | 3.33% | | | |
| Hiring | 1 | 3.45% | Individual contributor | 1 | 2.08% | Communication | 1 | 3.33% | | | |
| Stay interviews | 1 | 3.45% | Thrive | 1 | 2.08% | Equity | 1 | 3.33% | | | |
| Assessments Organization | 1 | 3.45% | Internal expert | 1 | 2.08% | Social Space | 1 | 3.33% | | | |
| DEI council | 1 | 3.45% | Values | 1 | 2.08% | Access | 1 | 3.33% | | | |
| Internal consultant | 1 | 3.45% | Interpersonal work | 1 | 2.08% | Imperfect | 1 | 3.33% | | | |
| Incomplete data | 1 | 3.45% | Blind spots | 1 | 2.08% | **Grand Total** | 30 | 100.00% | | | |
| **Grand Total** | 29 | 100.00% | Job satisfaction | 1 | 2.08% | | | | | | |
| | | | Resistant | 1 | 2.08% | | | | | | |
| | | | Alienation | 1 | 2.08% | | | | | | |
| | | | Strategy | 1 | 2.08% | | | | | | |
| | | | Accountability | 1 | 2.08% | | | | | | |
| | | | Sustainment | 1 | 2.08% | | | | | | |
| | | | Neutral | 1 | 2.08% | | | | | | |
| | | | Displeased | 1 | 2.08% | | | | | | |
| | | | Amplify | 1 | 2.08% | | | | | | |
| | | | Unintended consequences | 1 | 2.08% | | | | | | |
| | | | Openness | 1 | 2.08% | | | | | | |
| | | | Diverse identities | 1 | 2.08% | | | | | | |
| | | | Openness | 1 | 2.08% | | | | | | |
| | | | Add-on | 1 | 2.08% | | | | | | |
| | | | **Grand Total** | 48 | 100.00% | | | | | | |

From the refined list of codes, top themes emerged within each category and across the data set, mapping back to the interview and research questions (Table 9). The interview responses often addressed multiple interview and research questions. The analysis performed included linking these responses to the most relevant questions.

**Table 9**

*Research Inquiry and Predetermined Categories*

| Research Questions (RQ), Inteview Questions (IQ) and Predetermined Categories (PC) | |
| --- | --- |
| *(Based on interview data collection and analysis CY 2023)* | |
| **Research Questions (RQ)** | |
| **1: What are the conditions of DEI in Organizations?** | |
| **2: What changes related to DEI have occurred ?** | |
| **3: How has the environment influenced the function of DEI in organizations?** | |
| **RQ Mapping:** | **Interview Questions** |
| | **STRATEGY: Direction, Mission, Vision** |
| RQ:1 | 1. In which part of an organization (people, process, structures, or strategy) is the need for DEI intervention most visible? |
| RQ:3 | 2. How has the recent social climate in the external environment influenced the organization's DEI goals/objectives? |
| RQ:1 | 3. What other factors influence the achievement of DEI in your organization? (positively/negatively)? |
| RQ:1 | 4. How would you describe the influence and impact of DEI leaders in your organization? |
| RQ:1 | 5. What actions are prioritized to support DEI? |
| RQ:1 | 6. Where have you observed the most change within the organization? |
| RQ:2 | 7. Which area is most affected by changes in DEI goals and tasks, the organization's People, Processes, Structures, and Strategy? |
| RQ:1 | 8. What are the sensitive points related to DEI goals and tasks that repeatedly cause friction, problems, or conflicts? |
| | **STRUCTURES: Decision Making Power** |
| RQ:1 & RQ:2 | 9. Are the existing organizational structures (organizational structure, policies, decision-making) helpful in attaining DEI goals and tasks? |
| RQ:1 & RQ:2 | 10. Are the structures meeting the needs and capabilities of the leadership (management) and the workforce? |
| RQ:1 & RQ:3 | 11. How has the recent social climate in the external environment influenced organizational structures related to DEI? |
| | **PROCESS: Flow of Information** |
| RQ:1 | 12. What assessments, if any, have been conducted to discover how to intervene? |
| RQ:1 | 13. What interventions supporting DEI impact the organization's design, if any, have been pursued? |
| RQ:1 | 13a. How has the recent social climate in the external environment affected these interventions? |
| * Omitted | ~~14. Are the existing leadership procedures and processes focused on specific DEI goals/objectives and tasks? *(RQ1)*~~ |
| * Omitted | ~~14a. Do these procedures fit the organization's specific social and technical realities (technologies, other techniques, the composition of the workforce, etc.? *(RQ1)*~~ |
| | **PEOPLE: Policies Influencing Skills and Mindset** |
| RQ:1 | 15. What is the essential attitude of various employee groups toward the organization's DEI efforts? |
| RQ:1 | 16. How do these attitudes affect performance, teamwork, and job satisfaction? |
| | **TECHNOLOGY: Enables People Support** |
| **Changed to #17 | ~~17. How do procedures and support system changes affect people and structures in the organization?~~ |
| **Changed to #17 | ~~18. How do these attitudes affect performance, teamwork, and job satisfaction?~~ |
| RQ:17 | ~~How has technology support or influenced DEI?~~ |
| *\* Due to the similarities in several of the research questions unmber 14 and 14a were removed from the initial list of interview questions. \*\* Question 17 and 18 were combined to create the new question 17.* | |

# Chapter 4: Research Finding

## Study Results

This chapter details the results of the interview data collection and analysis performed to complete the research portion of this study. The findings include response themes aligned to the predetermined categories, research questions (RQ), and interview questions (IQ). A summary of these results can be found in Table 10.

### Table 10

### *Research Response Analysis*

| Response Theme Mapping | | | Data Analysis | | | | |
|---|---|---|---|---|---|---|---|
| Research Questions (RQ) | Interview Questions (IQ) | Response Themes | Percentage Frequency | | | Interview Participants | |
| | | *Strategy* | | | | | |
| | | 1.Greatest need | N=21 | % | | N=9 | # | % |
| RQ1 | IQ1 | People * | | 66%% | | 6 | 28.57% |
| | | Acceptance* | | 44% | | 4 | 19.05% |
| | | Integration | | 33.00% | | 3 | 14.29% |
| | | 2.Social influence | N-40 | | | N=8 | | |
| RQ3 | IQ2 | Decision making* | | 77% | | 7 | 17.50% |
| | | Changing conversations | | 55% | | 5 | 12.50% |
| | | Constraints | | 55% | | 5 | 12.50% |
| | | Climate-political | | 33% | | 3 | 7.50% |
| | | 3.Other influence factors | N=61 | | | N=9 | | |
| RQ1 | IQ3 | Expectations-employee* | | 55% | | 5 | 8.20% |
| | | Media | | 44% | | 4 | 6.56% |
| | | Climate-economic | | 44% | | 4 | 6.56% |
| | | 4.Leadership influence | N=65 | | | N=9 | | |
| RQ1 | IQ4 | Executive-sponsorship* | | 66% | | 6 | 9.23% |
| | | Risk adverse | | 33% | | 3 | 4.62% |
| | | Commitment-active | | 33% | | 3 | 4.62% |
| | | Commitment-passive | | 33% | | 3 | 4.62% |
| | | *Structures* | | | | | |
| | | 5.DEI priorities | N=-46 | | | N=8 | | |
| RQ1 | IQ5 | Retention* | | 38% | | 3 | 6.52% |
| | | Hiring* | | 38% | | 3 | 6.52% |
| | | 6.Observable change | N=19 | | | N=9 | | |
| RQ1 | IQ6 | Structures* | | 55% | | 5 | 26.32% |
| | | Process | | 22% | | 2 | 10.53% |
| | | 7. Sensitive points | N=38 | | | N=6 | | |
| RQ2 | IQ7 | Fear* | | 66% | | 4 | 10.53% |
| | | Resistance* | | 50% | | 3 | 7.89% |
| | | Acceptance* | | 50% | | 3 | 7.89% |
| | | 8. Usefulness of DEI Structures | N=42 | | | N=7 | | |
| RQ1 | IQ8 | Integration* | | 42% | | 3 | 6.82% |
| | | Performative* | | 42% | | 3 | 6.82% |
| | | Work in progress* | | 42% | | 3 | 6.82% |
| | | *Process* | | | | | |
| | | 9.Assessments HR data | N=28 | | | N=8 | | |
| RQ1, RQ2, RQ3 | IQ9 | Assessments (group/individual)* | | 50% | | 4 | 13.79% |
| | | Focus group* | | 38% | | 3 | 10.34% |
| | | Surveys * | | 38% | | 3 | 10.34% |
| | | *People* | | | | | |
| | | 10.Attitude toward DEI | N=48 | | | N=9 | | |
| RQ1 | IQ10 | Positive * | | 44% | | 4 | 8.33% |
| | | Training* | | 33% | | 3 | 6.25% |
| | | *Technology* | | | | | |
| | | 11.Impact of Technology | N=29 | | | N=5 | | |
| RQ1 | IQ11 | Data Analysis* | | 60% | | 3 | 10.00% |
| | | Hiring* | | 60% | | 3 | 10.00% |

*Strategy, Response Theme 1*

When queried about the domains in which the need for DEI presented most pronounced within organizations, the participants provided various responses. Of the nine participants, six specifically underscored the significance of focusing on "people" as the central area of concern. Two participants articulated that the need for DEI encompasses "people and processes." Two additional participants highlighted the critical importance of addressing "process and structure."

Three participants expressed a holistic perspective, emphasizing the significance of embedding DEI principles across all aspects of organizations, encompassing all four key components: people, processes, strategy, and structure. Additionally, four participants brought up the topic of the acceptance of DEI in organizations during this discussion. Participant 2 states, "The people are the ones who help us see where our systems, structures, and processes are most broken." In addition, Participant 1commented:

> [Acceptance ranges] from adamant disdained, or people say[ing] [the DEI efforts] are political, and we shouldn't be engaging in political things— to the people that [ask] where do I sign up? Sign me up for everything. I want to be involved— I want to be engaged.

*Strategy, Response Theme 2*

Eight study participants shared their insights regarding the social aspects influencing DEI within organizations. Notably, seven participants specifically underscored the discernable role of social factors in shaping decision-making processes related to DEI.

Five respondents highlighted the evolving discourse on DEI and identified various constraints arising from influential social factors that impact DEI efforts. Additionally, three participants recognized the political climate's impact, which gives rise to social dynamics affecting DEI. During the interview discussions, participants stated the following:

> Participant 2 stated that this weekend is [the] pride parade. And our organization went viral because of some of the work we're doing around social justice activism for the queer community, and you know we're navigating that right now, right? An entire group does not think our organization should be at the pride parade. Participant 6 expressed, I feel like maybe two years ago, companies were willing to be bolder, and DEI work was willing to be bolder, and I feel like, especially within maybe the last six months to a year, people are being a little bit more cautious. You have to be careful what you say, you know.

### Strategy, Response Theme 3

Among the nine participants who contributed responses regarding other factors influencing DEI, five specifically addressed employee expectations. Four participants commented on the impact of the economic climate and media attention-related DEI. Participant 6 said, "I think we're not as creative about hiring right now. We're trying to see what happens in the economy. So, I think a lot of our attention is focused, [and] redirected towards retention and what we're doing for existing employees." Participant 1 echoed, "Mental health is a part of our DEI component and strategy. And more and more new people in the workforce say that mental health is important to them. Belonging is

important to them, and ESG is important to them, so there is a greater desire for the

incoming workforce that companies have these things." Finally, participant 3 declared,

> Our political milieu and our media seem to be fanning those flames, making
>
> people feel famous times and making people feel like they wanted to do
>
> something, both individually and socially, so when we get to work, we do not
>
> have any skill with what to do about what we are confused about, what we are
>
> hurt by. [This] negatively contributes to our relationship because we take all this
>
> information as angst, and then we come to work, and we're like, I don't know, I
>
> don't know what to do with this, and you're wrong, and I'm wrong, and we're
>
> wrong …

### *Strategy, Response Theme 5*

Six participants commented on the importance of executive sponsorships. Three

participants described observing leadership traits demonstrating active commitment,

passive commitment, or risk aversions as elements impacting DEI functions in

organizations. Participant 7 stated, "I think that that leadership buy-in is important, [and]

the sponsorship because the leadership people are the ones that can allocate the resources

and make the decisions. So, you need a decision-maker that's kind of in your corner to

help you advance the DEI through your organization." Other comments from participants

included Participant 2's discussion on leadership: "…they do open doors to allow some

of this work to happen [including] funding for DEI initiatives or even allowing us to plan

for organization-wide training, right? However, I would say their biggest influence is just

monitoring for risk, monitoring for risk."

*Structure, Response Theme 6*

The inquiry about DEI priorities elicited responses from eight participants. Three participants emphasized that actions aimed at hiring and retaining employees were a key organization priority. Participant 6 highlighted,

Last year, our company was super focused on hiring, we were being really agile with hiring, we were doing good profit-wise. We're still doing good profit-wise, but as an industry, I think there are concerns about a recession. I think we're not as creative about hiring right now. We're trying to see what happens in the economy. So, I think a lot of our attention is focused, redirected towards retention and what we're doing for existing employees."

Participant 1 gave their take as well:

"Our executives [in the] C suite have goals tied to their performance around diverse hiring and retention. So not just are you hiring diverse people? Are you retaining them? And so that might change with affirmative action. I do think that our company believes in the value of diverse hiring; I will be curious to see how committed we are without a goal".

*Structure, Response Theme 7*

All nine participants responded to questions regarding observable changes in organizations related to DEI. Five participants discussed visible changes in organization structures to support DEI, while two noticed an emphasis on process changes. Participant 4 mentioned, "The biggest shift I saw was that [DEI] was well funded for the first time, and oftentimes taken out from under HR." Participant 1 stated, "I am in this position as the first Director of DEI after the CEO realized there wasn't enough structure around

DEI—this was following George Floyd." Participant 2 commented that there has been a shift since 2020, and "our department has 5 FTEs. One of those is a director." Participant 7 stated, "[I've seen] revised drug code policies and removed policies about tattoos, dress codes, and [moves to hire] non-violent and non-fraud-related felony crimes."

***Structure, Response Theme 8***

When discussing repetitive issues or sensitivities that show up related to DEI efforts, six participants responded. Four commented on fear as a barrier to progressing DEI, while five mentioned acceptance and resistance as an ongoing issue. Participant 1 said, "How can we help people see that you won't lose anything? There are plenty of resources. There's plenty of resources to go around. And so, I think that fear. Dissipating that fear is going to be an important purpose." Participant 8 continued,

> I am seeing pushback, and this is purely my perception. Within the organization, you have the people who buy into DEI because it's the right thing to do. Some people buy into it because they realize that it can bring an increased level of engagement, profitability, innovation, and all these things. And then you have, on some level, there's always the people who just don't buy into it for whatever reason.

***Structure, Response Theme 9***

In the conversations about DEI structures, three of seven participants noted that current systems are still under development and require further support in the ongoing efforts to integrate DEI. Additionally, three respondents mentioned that performative strategies and structures continue to linger. Participant 2 added to the discussion:

I do not know how else to put this. However, it is weird to be in a role where you always have to persuade people— the role is always persuasion, and there is never a soft place. There is never a place of just agreement. There is never a place of fluidity. It is always persuasion. And I am still determining if that's about our actual culture and what people believe or if that's how we feel positioned in the system. And if the systems of power are working just as designed, if you were to ask any of them, meaning the leadership we're talking about or the organizational guides, they would tell you that they're open to certain things and value certain things. And they even talk about them in [forums] like our annual meeting or on our social media when almost 90% of the time, some of our stuff is uphill having to convince someone.

Participant 1 stated, "[DEI should integrate] throughout everything we're doing and not have it as a separate component of the organization, "the former CEO after George Floyd said that they realized there wasn't enough structure around [DEI]. There wasn't enough formality to focus on diversity, equity, and inclusion". Finally, Participant 9 comments rounded out the discussion:

I don't think [DEI is] every strategic decision that they [leaders]are taking as one of its priorities. This means that we are still very far from being able to integrate it into everything we do, which is the ultimate goal. So, it's still on the periphery. It's still an add-on. It's still not integrated. It's still not at that stage. At that stage, where it is, it can be in every decision. It's just an outside initiative. We need a DEI initiative here. Okay, what can the DEI initiative be?

*Process, Response Theme 10*

Of the eight responses received from the participants regarding assessments and interventions, four respondents mentioned using group and individual assessments. Additionally, three reported their organization's use of focus groups and pulse surveys. Participant 5 said, "Truthfully, I don't think the organization is fully prepared for an [organization assessment] yet because you have to be ready to hear your mess." Participant 1 continued, "Worked with another consultant to do an assessment of our employee handbook, more broad policies, and practices. So, we've had a little bit of an assessment of culture through focus groups, a little bit of an assessment through our policies and practices." Participant 2 also added to the conversation, "The organization has also hired external consulting firms to do an organizational assessment, which is interesting because it only chose a small handful of people and a few surveys. But our department wasn't allowed to have that data or participate in those meetings". Finally, Participant 9 said, "[Monitoring] inclusion by pulse surveys to assess for impacts and training needs. The challenge of incomplete data due to voluntary disclosure and the need for more accurate assessments."

*People, Response Theme 10*

The predominant sentiment expressed by the nine participants when questioned about employee attitudes toward DEI was that four participants thought employees generally displayed positive attitudes. In addition, two respondents highlighted the issue of educational disparities within the workforce, further emphasizing the importance of DEI. Three participants discussed training as a continuous need to support DEI. As an example, Participant 5 said, "Those that are fully engaged or have engaged in we're

doing. For those that have not engaged, they have their ideas of what it is; that's not the reality of what we're doing." Participant 8 continued,

> "Part of it that I see is ensuring that the people that are put in leadership and or working on DEI interventions and programs and such have been equipped with some sort of formal training or some sort of training generally that allows them to analyze with a DEI lens versus and taking themselves out and like this whole concept of approaching. An issue or something that we're trying to solve without judgment. And bringing yourself into that whole, you know, the use of self in creating change, and I think some of those are missing.

### *Technology, Response Theme 11*

Five participants responded about the role of technology as it relates to DEI. Of those five responses, three said technology was mainly used for data analysis, primarily associated with hiring efforts.

**Chapter 5: Discussion**

This chapter concludes the research with a discussion regarding the factors affecting the function of DEI in organizations based on the data collected. Furthermore, the chapter details the study limitations and recommendations with insights gained from participant interviews.

During the analysis, prominent words and phrases were clustered into broad themes organized into five topic areas: strategy, structure, people, process, and technology. Further analysis distilled the data set, enabling the selection of overarching themes most relevant to the research question in each of the five categories. This study identified organization challenges and opportunities in response to the interview and research questions.

The complexity of DEI work demands self-awareness, corporate and environmental awareness, advisory, strategy development, coaching, consulting, managing, training, building relationships, and more. These individuals have provided an expansive and vibrant picture of their observations of DEI in the workplace, focusing on the post-2020 environment.

This chapter describes the characteristics of the participant pool, followed by an analysis of data collected from participants in response to the 20 open-ended questions presented during the one-on-one interview. Overall, the findings represent the participants' observations and experiences of DEI as it relates to the research questions:

- RQ1. What are the conditions of DEI in organizations?

- RQ2. What changes related to DEI have occurred organizations?

- RQ3. How has the environment influenced the function of DEI in
  organizations?

**Research Summary**

This exploration began with a chronology of DEI and the social movement. The existing literature examined in this study depicts waves of disruptive social movements catalyzing government action. As organizations embraced the settlement of novel ideologies and processes aimed at addressing the prevailing social issues, the initial momentum of the movements and activists' engagement often faded into the background. The literature reviewed for this study widely acknowledged that the effectiveness of these interventions remains under-researched and ambiguous.

While there have been improvements in diversity, persistent inequities, and barriers to advancement in the workplace continue to endure. The turning point in the new millennium arrived during a global pandemic with a tragic incident of overt racism resulting in the loss of a human life. Echoing parallels with the civil rights movement, activists once again took to the streets, demanding systemic changes to dismantle racial injustices within the workplace. This time, however, organizations proactively declared their commitments and pledged financial resources to address social demands.

Significantly notable throughout the participant interviews, six of the nine participants highlighted the significant impact of the social movement, more specifically in the wake of George Floyd's death. They consider the event a pivotal moment when DEI discourse changed among board members and executives. They described the initial surge of conversation and questions from executives, HR, organization development professionals, and employees taking on DEI responsibilities centered on the urge to do

something. The organization sought expert advice on what actions to take and how to implement them. These actions led to the creation of chief diversity roles, the hiring of consultants, and, when resources were scarce, assigning the responsibility to HR. In some organizations, leaders look for people of color to raise their hands and take on DEI initiatives. Participant 4 describes the effects of George Floyd's death:

> …there was a global wave that occurred in connection with that [event]". "There was a pendulum swing within the structure of DEI globally. And then this overnight event that created an oh, wait a minute [moment]. We do not have enough folks who are trained on this. And there are pros and cons to what happened next in that space of being reactive to the absence of trained individuals.

Participants discussed the swift actions of leaders allowing some individuals within organizations to step up and guide rapid interventions, which sometimes had unintended consequences, resulting in burnout and disillusionment among the people doing the work and the expectations of executives and leaders of organizations. Over three years later, the findings of this study revealed that participants' observations of their organizations regarding DEI and the social climate were often similar, leading to consistent themes.

**Unpacking the Response Themes Using the STS Framework**

As discussed in Chapter 2, applying the STS framework serves dual purposes as both a diagnostic and intervention framework. In this study, the data collected unveiled a concentration of thematic elements within the dimensions of the organization components, specifically people (mindset/skillset), strategy (direction), and structure (decision-making) as show in Figure 3. The dataset aligned directly with predetermined categories of interview and research questions, with one exception. While not centralized

within a specific category, the theme of engagement commonly appeared across the dataset. Notably, fewer themes emerged around Process and Technology.

Comprehension of the data provides insights into how DEI integrates across the organization's design and the balance occurring among the organization's components. These insights inform decisions on whether adjustments within the organization's design are needed or not to support the systemic changes required for DEI integration.

With this information, DEI leaders can intervene at any level of the organization to make data-driven decisions and trade-offs regarding implementation. The framework facilitates the assessment of outcomes tracing to the organization's design. Figure 3 illustrates the connection of the research themes to the organization component.

**Figure 3**

***Alignment of Research Themes to Organization Domains***
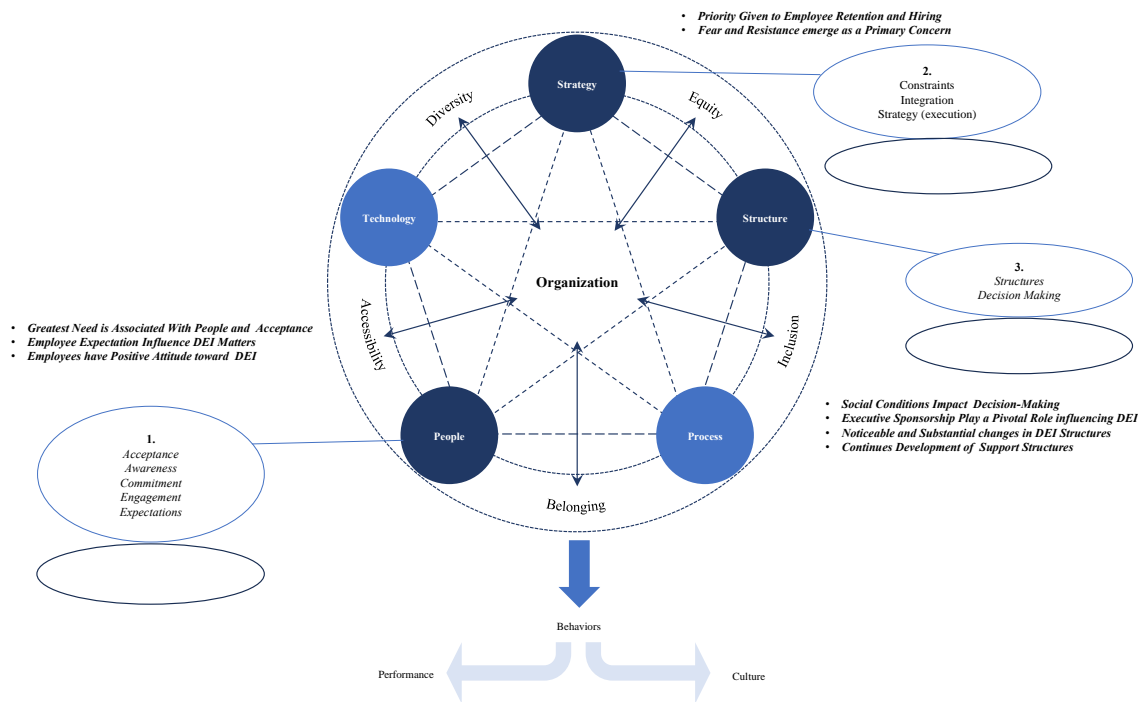
The demand for systemic changes to eradicate racism in organizations propelled the conversation regarding integrating DEI into the organization's design. When study participants were asked to select the one organization component most needed for a DEI intervention, all participants shared the principal belief that all components were necessary to integrate DEI.

**People**

The most prominent response chosen represents the component of the organization that governs policies, builds capabilities, and develops mindsets, thereby cultivating the talent necessary to support the organization's strategy and structure. The themes uncovered in this category reflect the perceived mindset and skillset of employers.

*Employee Acceptance*

More specifically, DEI's varying degrees of acceptance emerged as a common theme during this discussion. Participants commented on several challenges regarding executive buy-in and engagement from middle management and line staff, citing improvement opportunities.

Participants believed several causes contributed to the lower acceptance of DEI outside of the top levels of the organization. Some organizations strategically invested heavily in awareness training and other initiatives aimed at top-level leadership to gain organization-level support upfront. This phased approach resulted in lower engagement with the larger audience of employees by design.

Balancing work demands also contributed to mid-level and line-employee involvement and participation in DEI efforts. They highlighted the rising hustle culture

within the organizations, impacting DEI efforts. Participant 1 stated, "People say time is a barrier, but then show up to other things that are not DEI... Some people do not want to be there, and some don't have time."

Participants mentioned initiating conversing with other DEI leaders from external organizations to gain insights into this issue. Participant 5 shared, "I try to just talk to people who are outside; hey, how are you doing [ with middle management]? [And they respond,] "We have the same issues. It is not an issue that is just one-sided or one team... I am seeing multiple organizations are having the same issues."

On the other hand, the participants acknowledged that supervisors are often exhausted, given their role in maintaining the organization's operations. Participant 5 said, "Frontline supervisor positions are harder to get on board… that is for multiple reasons…these people are exhausted. Some of these people are working the hardest in our organization to keep things afloat and keep things together."

### *Employee Expectation Influence DEI Matters*

Employees possess diverse and dynamic needs and desires. Within the boundaries of DEI, new entrants seek organizations that support various employee social interests, including DEI, education assistance, career advancement, mental health, wellness, and social impact. Additionally, employees exhibit different engagement preferences concerning DEI initiatives. Participants commented that their organizations consider these features to attract top talent and remain competitive.

Organizations need to be made aware of the needs of the workforce and communities in their environment. To explore opportunities for diversity, Participant 7 said that "people are living with disabilities in these communities who are

underemployed— you probably have LGBTQ+ living in these communities as well, and the footprint on the indigenous reservation—has anybody indigenous worked in your organization?"

### *Positive Attitudes toward DEI*

While participants indicated that employees generally hold positive sentiments toward DEI, this perception primarily applies to individuals actively participating in DEI programs and initiatives. Participants noted that a range of attitudes exists toward DEI. Participant 5 described observations of employees participating in DEI initiatives:

> [The attitude] depends on the employee and their level of engagement. If an employee is engaged in what we are doing, they are going home and are so excited that this is something we offer. I have not met one employee who has engaged in the things we have done that have not been so excited and cannot wait for the next thing. I have those who have not engaged [who believe this is an incorrect idea for DEI]. They have an idea of DEI that's not what we are doing.

This could also indicate a challenge with how leadership measures and perceives employees' attitudes toward DEI. "I think the sentiment towards it is positive" was commonly discussed on more than one occasion. The participants generalized the sentiment of DEI as positive. Participant 1 said, "It is positive. I would say neutral, leaning towards positive. … there is probably 50 % to 75 % that do not believe in the work. The rest are somewhere between neutral and engaged." Participant 8 reiterated, "People want to get involved, want to get their hands dirty and move this along. Generally speaking, I think that is the fair assessment. I think there is this openness to it and some open-mindedness to it."

**Strategy**

The goals, objectives, values, and mission set the organization's direction. The themes that surfaced included constraint, integration, and strategy integrations. The discussion describes factors impacting the implementation of the organization's strategy.

*Priority Given to Employee Retention and Hiring*

Retention and hiring surfaced as the immediate priority related to DEI. The economy and the potential of a recession drive closer attention to funding. While the realization of the budget reduction had not occurred, participants described a measure of caution due to the world economy and, more specifically, conservative industries. Additionally, the entanglement of social, political, and economic constraints can create significant hurdles and even pause DEI efforts.

Participant 6 commented that budgets are being a little bit more watched: "We are trying to be safer when it comes to expenses and budget. We have not done anything on the DEI end, but that is still kind of a factor thing that plays a role. Also, I think we are not as creative about hiring right now. We're trying to see what happens in the economy."

Other organizations have shifted focus to retention following departures. Participant 8 stated, "Where we are seeing reduced engagement or even people resigning or leaving the firm, we are trying to grow the professionals internally, the way the organization functions is, you come in, and ideally, there is a path forward for that professional at the leadership level."

*Fear and Resistance Emerged as a Primary Concern.*

Participants named fear and resistance as significant barriers to DEI. For example,

the fear of loss observed in homogenous groups or the fear in marginalized communities stepping into unchartered territories and new roles. Participants noted resistance in the form of backlash against DEI, which, in some instances, paused the progression of the work.

In the conversation regarding social influence, the tension fueling fear and resistance attributed to media and internal and external economic, political, and social conditions, customers, and stakeholders. Participants discussed conversation, becoming more cautious around DEI in recent months, a departure from the bolder discussion and forums immediately following the 2020 social movement. Participant 2 explained,

I think pretty regularly, we are externally pushed to prioritize something other than [our products or services], and that is either from those who are social justice advocates and also from those who are alt-right conservative religious parts of our community; our state looks like a blue state and yet a lot of our liberal influence is in our more urban areas or more city-focused areas, but we do have a lot of rural communities. It affects us in big ways but is not as straightforward as community antagonism. Sometimes, it is about our funding. So, even the funding that we [receive], I mean, who does not want to give money to [our cause]? And at the same time, some of our initiatives cannot move forward because our largest donors encourage us not to. In addition, the fact that a lot of our government-funded programs for nonprofits or even maintaining our nonprofit status requires us not to engage in political action. So, there are many things that we are silent on because of our nonprofit status. [These are] things that we have to navigate.

*Executive Sponsorship Plays a Pivotal Role Influencing DEI*

Most participants acknowledged the significance of having leadership support, and organizations invested extensively in gaining the buy-in of these leaders to achieve some positive results. Participants shared insights into their interactional intervention for the board and executive leaders.

Participant 3 stated, "no matter what level of leadership they are at, they need to see the things that are happening. So, the interventions, the conversations, the training, whatever they are, even the responses to tragedy in the world or in their communities, those are processes that they need to see on a regular basis on the calendar". Participant 6 mentioned, "The company has been very outspoken about its commitment to DEI. However, for each leader of each department or area, I think there's still a lack of support from them. I think they are the ones who are going to implement some of these DEI policies or think about DEI in their work. That is where I think there is a little progress to be made." Finally, Participant 5 said, "I almost think our C-suite folks are ahead of our middle managers. Directors and above seem ahead of our frontline supervisors and middle managers. However, our team members are way ahead."

Despite progress, some participants discussed common challenges around the espoused commitment to DEI and the ability to integrate DEI. They described a risk-averse leadership culture where executives focused on monitoring risk to avoid litigation. Leaders are creating the path for DEI initiatives to occur. They described a litigious corporate culture indicative of the culture in the United States. They discussed even when there is sound data to base decisions, leaders are called to protect the organization. The participant's account of the barriers that pause or prevent the integration and

implementation of DEI interventions provided the following insights: participant 8 discussed, "putting programs in place based on laws intended to protect marginalized communities and having them questioned by dominant group members. Those questions…make organizations pause at a minimum. To make sure that they are not putting themselves in a position where somebody might – could use what is being done as a reason to sue the organization.''

Another participant offered a similar example and described how organizations address discrimination behavior: "The system requires the person on the receiving end of discrimination to prove the behaviors they experience. The issue is diminished or dismissed to avoid legal action because no structures or processes are in place to support them." Participant 3 also mentioned,

> So, if something happens to me because one of my identities … I was
> discriminated against, I have to prove it, which means show the email…the power
> and resources and our legal compliance teams in almost every organization is
> looking for that precisely because we are such a litigious community and not just
> here…but just in general we are risk averse. We do not want more organizations
> to be sued or in the news being threatened to be sued.

A significant pattern in the data characterized leadership behaviors as active, passive, and risk-averse executive-level sponsorship.

### *Noticeable and Substantial changes in DEI Structures*

When discussing influential elements, including the external environment and social climate, and their impact on DEI goals and objectives, participants highlighted the subtleties involved in achieving broader acceptance of DEI. Societal pressures, customer

expectations, and evolving norms significantly shape how leaders within their organizations prioritize DEI.

### *Continues Development of Support Structures*

The participants commented on visible organizational changes, some resulting from societal pressure, while others were the outcome of planned DEI interventions. Participant 7 stated, "I think the most change has been with the [organizations] just getting started because many may not have done anything until May 2020. Because they did not know where to start [our industry was saying], we need to do something. Can you give us some guidance on what to do first?"

Several participants mentioned being the first in their role within their organization. Participant 2 said, "There has been a shift since 2020 and 2016; our department has five FTEs, one of which is a director." "Policies are changing," as Participant 7 noted, "[I've seen] revised drug code policies and removed policies about tattoos, dress codes, and non-violent and non-fraud-related felony crimes.

The MeToo Movement, the pandemic, and the social movement following the death of George Floyd were impactful in changing how DEI was talked about and the actions that followed in organizations. Organizations and people at every level were empowered to be bold in their conversations. Participant 4 stated that "for the first time, DEI was adequately funded. People were hired or promoted to focus on DEI, which elevates DEI roles in organizations and as a profession". Organizations were acknowledging DEI as a moral imperative. Participant 9 mentioned the addition of Accessibility following a recent executive order.

**Assessments and Interventions**

Organization structures, policies, and decision-making processes contribute to attaining DEI goals. However, some organizations have layers of approval for funding allocations and acquisition approvals; these structures can hinder progress due to the complexity, risk aversion, and internal systems.

Aside from pulse surveys, stay interviews, and exit interviews, participants have found it challenging to obtain accurate data due to distrust and concerns regarding the use of the data, especially when the DEI function remains tightly coupled with HR. Thus, organizations encounter issues with incomplete data because employees opt out of voluntary disclosure.

The participants mention several group and individual-level interventions performed internally. They indicated outsourcing organization-related assessment as a common occurrence and, in some instances, without the involvement or input from the in-house DEI professional. In addition to the lack of quality data, participants described other challenges in achieving the integration of DEI, participant 9 stated:

It means that you do not even have to say DEIA; it just means that whatever you do, you think about all through a lens of DEI—bridging the gap between different perspectives within the organization. Some see DEI as essential, while others view it as a distraction from work. Closing the gap and helping people understand the integration of D&I into their role and responsibilities remain a significant challenge. Now, that is the gap, that challenge is to fill that gap for people to understand that [DEIA] is not something removed from your work. So, tell us what level of intervention do you need or what level of support do you need so

that it helps you do your job better? Until that gap is closed, and you do not see it

as something that takes away from their actuality—it is a big challenge.

Secondly, participants described fear and resistance as a cause of constraint, variant strategies of integration and strategy execution, and fear and resistance because of these factors. Participant 3 stated:

So a lot of organizations, especially in 2020 and 2021, turned their social media

black, and they started promising money was going to go to certain organizations,

and they were going to change their vendor supplier practices because they were

afraid that if they did not, all of their constituents or the folks that they were

hoping to connect to in the market, we are going to see them as fake or is not part

of as part of the problem. And then there is the fear also there that we cannot even

state open to serve the people that we are serving and even have a DEI program

because that funder is going to take that money away. Now, I say that, and one of

the things I always tell our philanthropy folks is that there are donors and funders

that are out there in the world who are just waiting to give their money to an

organization that says to heck with all that. We are going to risk it, and we are

going to put it down there that this is who we are and what we are doing.

Thirdly, decision-making in DEI, as well as the implementation of related structures, is influenced by social conditions and executive sponsorship. Participants perceived the organization structure as a domain marked by consistently observable development and change. Participant 3 provided in-depth commentary:

But the problem is, especially for those of us that are inside of systems that we are

now [too], hardly ever, the person with all of the decision-making authority across

the nation and then I would probably, I would argue probably across the world

that the DEI professional or the person with the DEI in their title is not generally

the CEO of the person who can make all of the decisions. And so, being that that

is the case, then you do have people who are in leadership or other decision-

making positions where you must convince them. You have to give them a

business case and then work through their own individual, like the interpersonal

work, and so if the person is not best friends with that person and if they are not

believed by that person, then you have an adversary now in a decision-making

process.

Participant 5 continued the thought,

Well, I will say, because I report directly to our chief governance officer, we have

good conversations about the things that we are doing, right? I'm also proud of the

foundation team, and I am part of the foundation advisory board. That allows me

to know when we are doing our giving as an organization. I can say, hey, let us

make sure we are considering this. If we talk about Environment, Social

Corporate Governance (ESG), I am the "S" in the ESG, right? I absolutely

influence the things that we are doing. That not only can I say it, but you know

when I am meeting with our [chief], I can give him advice to, hey, we really need

to think about

**Summary of Discussion**

The study identified a prevailing discourse among participants centered on

acceptance, equity, and a conviction around the need to integrate DEI principles into all

aspects of the organization. However, the emphasis on strategy and working with people

seemed disproportionately skewed compared to structural and procedural implementation. Notably, incongruences between the expressed ideals of acceptance, engagement, and commitment and the perceived experiences of individuals exist within organizations. Moreover, participants described the constant changes in DEI acceptance, conversations, and commitment to the social environment cues, which, in most instances, play a crucial role in how DEI functions in organizations. Participant 1 punctuated this idea, "And so, for sure, the social climate has been a propelling, you know, event. Now, politically, on the other side of that, people will send anonymous messages through our ethics hotline, you know, to indicate that they feel like they are being discriminated against as a white male or this is political, and we should not be talking about politics".

The studies conducted by Hogan et al. (2023) and Lamba et al. (2022) highlighted in the literature review observed organizations responding to the COVID-19 crisis with a variety of strategies and interventions to achieve DEI. Similarly, this study finds organizations, in many instances, demonstrated a reactive stance to the external social environment.

Participants in the current study emphasized witnessing organizations adapt their design to accommodate the demands of COVID-19. Perhaps the shocks induced by external crises have cultivated a muscle memory that prompts organizations to proactively include DEI considerations in their strategic discussions beyond crisis response. This involves a continuous scanning of the environment to comprehend the desires and needs of the workforce in the same capacity as the other core functions of the organization.

**Study Limitations**

The first limitation concerns the composition of our participant pool, primarily comprised of DEI leaders responsible for organization-wide initiatives, covering middle managers to CDOs. While their perspectives offered a comprehensive organizational overview, it is crucial to include input from middle managers and employees at the grassroots level. Including these stakeholders presents an opportunity to gain a more nuanced understanding of their perceptions regarding organization-level DEI efforts and practical strategies designed to engage them in promoting DEI within organizations.

The second limitation raises the challenge of data variation and the generalizability of research findings that might occur with smaller sample sizes. Guest et al. (2006) propose that 6-12 interviews may be adequate for qualitative research, especially in domains with widespread experience or knowledge. However, if not meticulously chosen, insufficient sample size can be problematic, particularly in cases where purposive sampling is heterogeneous, data quality is compromised, and the domain of inquiry is complex.

Lastly, the third limitation links to the interviews conducted primarily via video calls. This restricted the ability to observe non-verbal communication. Sometimes, I could sense caution in responding to specific questions and therefore understood the importance of maintaining the anomy of the participant. However, the absence of body language cues during the discussions constrained my capacity to gauge whether there was a need to adjust the research inquiry or offer additional context.

**Recommendations**

The following recommendations are suggested based on the study data and areas identified that would further benefit the field.

First, there is an opportunity to explore further the benefits of incorporating more frequent and deeper environmental (i.e., economic, social, political, corporate culture) analysis into the examination of DEI. In today's dynamic societal environment, these insights might provide the data needed to support the workforce's needs and inform leadership strategies and decision-making to ensure DEI becomes an integrated component of organizations. Future collaboration with organizations to conduct ethnographic trans-organization field studies could enhance understanding of DEI conditions provided the organization creates the psychological safety and empowerment of employees participating in the research.

Second, it is essential to examine the impact of DEI at the operational (middle management) level to understand the challenges and tensions associated with managing operations while actively engaging in DEI initiatives. The study revealed a void in the systematic continuous feedback mechanism to understand employee desires. Research at the operations level of the organization might generate valuable insights that drive practical strategies for realistically engaging middle managers and promoting the integration of DEI principles into everyday operations.

Third, the field of DEI would significantly benefit from an investigation of DEI from a trans-organizational perspective. This approach would involve examining DEI initiatives spanning multiple organizations, considering collaborative efforts, partnerships, and collective impact. This research would enhance our understanding of

how to sustain DEI on a broader scale, particularly with the advent of new technologies that present many unknowns for the future of work. In this light, considering DEI as part of ESG might prove beneficial. However, the caution here is that DEI, in its expansive definition, moves further away from the resolution that can address the deep-seated impacts of slavery, discrimination against black people, and the generation gap in wealth that followed. This issue, often avoided, leaves the question of what is needed to right these wrongs. Attention to the complexity of this issue seems more distant from the current DEI agenda.

With the shift of corporate America allocating resources to DEI efforts as a direct response to the social movement, the study cautiously echoes a new paradigm on the horizon, one that could perhaps pair DEI more closely with organizations' sustainability and the ideology of ESG. Adding people to the mix (PESG) requires consideration in all aspects of the organization's design, decision-making, investments, and operations.

**Conclusion**

Overall, this study provides valuable insights into the experiences of DEI leaders and emphasizes the significance of acceptance at all levels of the organization, leadership engagement, strategic integration of DEI, and the need to address challenges within organizational structures. It points to the complexities in advancing DEI within organizations and calls for further research and exploration of effective strategies to foster inclusive environments and equitable practices. The findings of this study contribute to the growing body of knowledge on DEI and serve as a foundation for future studies and interventions aimed at promoting diversity, equity, and inclusion.

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