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WORKING WITH DIVERSITY: A FOCUS ON GLOBAL ORGANIZATIONS

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This paper provides an applied knowledge base of concepts, strategies, and methods for working with diversity in organizations, particularly those operating in a global context. It synthesizes a wide range of research and experience from different disciplines, countries, and organizational settings and is designed to challenge and stimulate new ways of thinking about diversity and its meaning for organizations. We envision working with diversity as integrating the varied knowledge, perspectives, and values that people of diverse backgrounds bring into all aspects of an organization's work, structure, and systems. The paper aims to assist leaders, managers, staff, and change agents to craft a strategy and approach to working with diversity appropriate to their organization's specific needs and aspirations. It summarizes strategic forces motivating organizations to work more intentionally with diversity; defines three distinct approaches to working with diversity—the social differences lens, the cultural differences lens, and the cognitive-functional lens—and reviews two major diversity change strategies—the organizational development approach and the action research and collaborative inquiry approach. Strengths and weaknesses of the various strategies and approaches are analyzed.

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A. PURPOSE OF PAPER

The purpose of this paper is to provide a rich and applied knowledge base of concepts, strategies, and methods for working with diversity in organizations, particularly those working in international contexts. We have synthesized a wide range of research and experience from different countries and organizational settings. We hope that leaders, managers, staff and change agents can draw on this knowledge base to make strategic choices and craft an approach to working with diversity that is appropriate and tailored to their organization's specific needs and aspirations.

B. CONCEPT OF DIVERSITY

Many organizations worldwide are grappling with the opportunities and challenges of working with diversity. Diversity is a complex concept. While diversity efforts have the potential to strengthen organizational effectiveness and efficiency and to advance social justice, experience has shown that realizing the full benefits of diversity is neither a simple nor a straightforward process. It is one thing to *create* diversity by recruiting people of different nationality, cultural background, race, gender, sexual orientation, religion, discipline or work style. It is quite another to develop a supportive work environment that enables people of diverse backgrounds to perform at their highest levels, contribute fully to the organization and feel professionally satisfied. It is an even greater challenge to integrate fully the varied knowledge, experiences, perspectives and values that people of diverse backgrounds bring into an organization's strategy, goals, work, products, systems and structures. The ultimate goal in working with diversity is to weave it into the fabric of the organization—into all the different dimensions of work, structures and processes. It is this kind of comprehensive approach that experience and research indicate is needed for an organization to reap the fullest benefits from diversity in terms of enhancing equity, effectiveness and efficiency.

With this vision of diversity, we refer to “*working with diversity*,” rather than “*managing diversity*,” the term that is most common in the literature. *Working with diversity* connects directly to the work of the organization and the people within it. It implies that diversity is the work and responsibility of everyone, not just of the managers and leaders. It suggests that diversity is an asset to be used and developed, rather than a problem to be managed. And, it projects a sense of dynamism and continuity.

C. STRUCTURE OF THE PAPER

To guide readers in their thinking about how to work with diversity, we have structured the paper around three guiding questions.

- *Motive forces*: What are the motive forces driving our need to work more intentionally with diversity?

- *Analytic approach:* How do we define and understand diversity in a way that is meaningful for this organization?
- *Change strategies:* Which change strategies, methods and tools will be most effective given our objectives and approach to working with diversity?

D. MOTIVE FORCES

Diversity efforts are most effective and sustainable when they are tied explicitly to the strategic objectives of the organization. This means that each organization needs to undertake a strategic analysis to define the key reasons—or motive forces—for working with diversity in a meaningful way. This is what many experts call “building the business case” for diversity. In Chapter II, we identify nine motive forces for focusing explicit attention and resources on diversity. We review the potential benefits as well as the challenges of each:

- enhancing innovation, creativity, and problem-solving;
- strengthening collaborative modes of working;
- gaining broader access to clients, beneficiaries, investors and other stakeholders;
- responding to changing workforce demographics;
- improving retention of high quality staff;
- enhancing operational effectiveness;
- promoting social justice and equity;
- responding to organizational mandates and directives; and
- excelling in performance and industry reputation.

The review of research and experience summarized in the discussion of these motive forces shows clearly that diversity can bring significant benefits to organizations. However, it also brings challenges. The clear lesson is that diversity is unlikely to lead to improved organizational performance or equity unless it is recognized explicitly as an asset and is worked with intentionally and systematically throughout all aspects and areas of the organization.

E. ANALYTIC APPROACH

Once an organization has carried out an analysis of its motive forces for working with diversity, it is important for the organization to ground its vision of diversity in its specific context. It needs to develop an operational definition that focuses on the dimensions of diversity that are most salient for strengthening its organizational effectiveness and efficiency. The analytic framework in Chapter III focuses on various dimensions of diversity and different approaches for working with diversity. To assist organizations in selecting the most relevant approach, we have synthesized the literature and experience on diversity and defined three primary approaches, or lenses: the social differences lens, the cultural differences lens and the cognitive-functional lens. These lenses represent distinct and major streams of work on diversity. When applied to organizations, all three lenses examine how differences in group affiliation affect the organization’s work culture, systems and work practices; its social relations; and individuals’

behaviors and work and career outcomes. The lenses differ primarily in the types of group differences treated. We describe each lens, discuss the major ways in which it has been applied in organizations and give our assessment of its specific advantages and disadvantages. It is important to underscore that the three lenses on diversity can intersect and inform one another.

- The *social differences lens* focuses on differences shaped by membership in identity groups that reflect salient social categories, such as race, gender, ethnicity, class, age or sexual orientation. An identity group is a group whose members have participated in equivalent historical experiences, are currently subjected to similar social forces and, as a result, have consonant worldviews. From the perspective of the social differences lens, these identity group categories are viewed as socially marked or valenced, meaning that they are significant in shaping how societies are organized and how individuals within societies categorize themselves and others. Often these categories shape the distribution of roles, power, opportunities and resources in societies. As a result, in many societies, these identity categories are “legislated” to prevent discrimination and ensure equal opportunities. The focus of this lens is on how differences among group identities affect social relations, work behaviors, distribution of opportunities and work outcomes in organizations. It also focuses on the way in which social identity shapes perspectives, experiences and values, and how these differences can be fully utilized within organizations.
- The *cultural differences lens* focuses on cultural differences of diverse nationalities or ethnic groups and their implications for organizations. Culture is defined as a patterned way of thinking, acting, feeling and interpreting. It is comprised of norms, values, beliefs and expressive symbols that members of a group use to create meaning and interpret behaviors. This lens examines both how culture and cultural differences affect social relations, work behaviors, communications and expectations in organizations, as well as how differences in values and norms shaped by a society's culture affect organizational culture and norms of effective management. From the perspective of this lens, culture influences almost all aspects of management, including organizational factors, management and leadership behaviors and styles and management systems and functions. Work on cultural differences has increased with the recent expansion of globalization. We review two major approaches: the cross cultural comparative approach and the international management approach.
- The *cognitive-functional lens* focuses on diversity in task-related knowledge, skills and experiences as well as differences in styles by which individuals access information and acquire knowledge. Task-related knowledge and skills are shaped primarily by educational background, disciplinary training, organizational tenure, or organizational function, specialization and level. Functional and disciplinary diversity works with differences in the content and skill aspects of task-related differences (e.g. *what* is known). In contrast, cognitive diversity focuses attention on differences in *ways* of knowing and learning in relation to specific tasks. Cognitive diversity includes the range of styles people employ to access information and knowledge, analyze it and apply it. Because of its focus on task-related diversity, work using this lens emphasizes the link between diversity and organizational and work group performance. Differences tend to be seen as neutral and objective and this lens gives limited attention to the impact of cognitive-functional diversity on individuals' career outcomes.

F. CHANGE STRATEGIES

A comprehensive diversity initiative needs to incorporate multiple objectives.

- *Achieve organizational justice* – to ensure fairness and equity for all organizational stakeholders.
- *Reduce bias* – to help individuals and groups in the organization recognize and address the prejudices that impact their behaviors, attitudes and organizational outcomes at work.
- *Develop cultural competence* – to help individuals learn about their own culture and identity and that of others and to learn how to interact effectively across such differences in the work environment.
- *Act on the added value that diversity brings* – to learn to incorporate and use the value that different perspectives and beliefs bring to all the different dimensions of work and organizations.

Within this framework, Chapter IV focuses on how a diversity initiative should be designed and implemented once the specific objectives and approach to working with diversity have been defined. The key components of a diversity initiative are:

- defining a vision of the desired outcome, that is, a successfully diverse organization;
- understanding the dynamics of change and establishing an appropriate strategy for change, which is tailored to the organization; and
- selecting and combining the most effective interventions and best practices in order to achieve the goals for diversity change.

From our review of the literature we suggest that there are two major change approaches under which most diversity initiatives fall: 1) long-term, planned, systemic organizational development approaches; and 2) action research, collaborative inquiry approaches.

The organizational development approach to diversity is an integrated, planned, system-wide and long-term process that addresses a complexity of organizational dimensions and levels.

Organizational development approaches are characteristically managed from the top, cascade down the organization to other organizational levels and make use of external consultants as experts who support the organization throughout the process of change.

In understanding this process, Holvino's Multicultural Organizational Development Model provides a useful framework of the stages of an organization moving from a *monoculture*, an exclusionary organization where the values of one group, culture or style are dominant, to *multicultural*, an inclusive organization where the values of diverse peoples are valued and contribute to organizational goals and excellence. Most organizations using the organizational development approach to designing and implementing a diversity initiative follow a five-step process: 1) preparing for the initiative; 2) assessing needs related to diversity; 3) developing a vision, goals and a strategic plan; 4) implementing the interventions selected; and 5) monitoring and evaluating progress and results.

The strengths of the organizational development approach to diversity are that it provides a clear focus; it is similar to other planning processes and is thus familiar; it is management driven; and the logical and deliberate pace of change promotes a sense of organizational security amidst potentially threatening change. Some of the disadvantages of the approach are that unforeseen organizational changes can derail the initiative; the long-term effort can be difficult to sustain; and there is a tendency to rely too heavily on educational programs, policy changes and accountability measures at the expense of cultural change interventions.

The action research and collaborative inquiry approaches to organizational change focuses on joint inquiry and learning between internal and external change agents. These approaches are usually more fluid and iterative than organizational development approaches to diversity. Nevertheless, action research and collaborative inquiry usually include the following phases: 1) entry and set-up; 2) data collection and inquiry; 3) analysis; 4) feedback and action planning; 5) implementation and experimentation; 6) monitoring and evaluation; and 7) learning, adaptation and further experimentation. Some of the strengths of action research and collaborative inquiry approaches to diversity are that they involve many stakeholders; strengthen the internal capacity to sustain change; promote organizational dialogues; generate less resistance; and integrate the expertise of internal and external change agents. Some of the limitations are that it may be more difficult to get leadership commitment and resources; the participatory process may generate too many change ideas and create unrealistic expectations; and the unbounded nature of the process may require on-going negotiation.

Whatever approach is used, diversity initiatives require a multilevel approach that addresses different types of organizational change: structural change, cultural change and behavioral change. These three types of change operate synergistically, becoming the key leverage points for intervention. One of the principle challenges of a diversity initiative is to include the right mix of interventions that will maximize change by supporting or reinforcing each other.

Finally, based on our review of the literature and organizations' experiences, we have distilled 13 conditions for success for a diversity initiative.

- Work from an inclusive definition of diversity.
- Develop a strategic vision and plan with clear objectives.
- Align the initiative to the core work of the organization and its strategic goals.
- Engage many forces and people to create a broad sense of ownership.
- Have clear leadership and involvement of senior management in the change process and identify internal champions with explicit responsibilities for implementation.
- Pay attention to internal and external factors (such as external pressure groups or budgetary conditions) that may support or hinder the initiative.
- Build the change strategy from a solid analysis of diversity issues in the organization.
- Provide freedom to pilot and experiment with changes.
- Convey the importance of engaging in a dynamic and systemic process, not a “quick-fix” solution.

- Encourage an open climate that allows for the expression of passion, compassion and forgiveness throughout the change and learning process.
- Assign accountability across all levels and types of employees, including senior management.
- Ensure the competence of consultants engaged in designing and facilitating initiatives.
- Recognize, celebrate and connect “small wins” in order to aggregate small changes into a larger change process with more impact.

With respect to global organizations, we add the following suggestions: 1) make special efforts to identify and utilize in-country resources to provide demographic data, cultural and social science research, and other relevant diversity information; 2) partner local resources with external resources in order to develop the capacity of country nationals to work on organizational diversity and to ensure that external consultants understand and respond to the local context; and 3) pay attention and respond to the national social context, but also accept responsibility for providing leadership in changing accepted patterns of social behavior that are no longer suitable in a multicultural and global environment.

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I. INTRODUCTION

A. DIVERSITY IN ORGANIZATIONS

Many organizations worldwide are grappling with the opportunities and challenges of working with diversity. Diversity is a complex concept and process. While it has the potential to strengthen organizational effectiveness and efficiency and to advance social justice, experience has shown that realizing the full benefits of diversity is not a simple nor straightforward process. With accumulating experience, we have learned that it is one thing to *create* diversity in an organization by recruiting people of different nationality, cultural background, race, gender, sexual orientation, religion, discipline or work style. But it is quite another to develop a supportive work environment that enables people of diverse backgrounds to perform at their highest levels, contribute fully to the organization and feel professionally satisfied. And, it is even a greater challenge to integrate fully the varied knowledge, experiences, perspectives and values that people of diverse backgrounds bring into an organization's strategy, goals, work, products, systems and structures.

From our perspective, the ultimate goal in working with diversity is to weave it into the fabric of the organization—into all the different dimensions of work, structures and processes. We picture an organization that constantly seeks to recognize, reflect upon, learn from and develop diversity as a perspective that permeates its work. In such an organization, diversity shapes, for example, how the organization defines opportunities and challenges in its environment; defines its strategy; identifies its clients, partners and beneficiaries; recruits its staff and leaders; does its work; builds partnerships and alliances and puts together teams; defines success and competence; motivates people; shares information and knowledge; and deploys its management systems. Experience and research indicate that this kind of comprehensive approach is needed for an organization to reap the fullest benefits from diversity in terms of enhancing equity, effectiveness and efficiency.

With this vision of diversity, we refer to “*working with diversity*,” rather than “*managing diversity*,” the term that is most common in the literature. *Working with diversity* connects directly to the work of the organization and the people within in it. This implies that diversity is the work and responsibility of everyone, not just of the managers and leaders. It suggests that diversity is an asset to be used and developed, rather than a problem to be managed. And, it projects a sense of dynamism and continuity rather than of stasis and insularity.

B. PURPOSE OF THE PAPER

The purpose of this paper is to provide a rich and applied knowledge base of concepts, strategies and methods for working with diversity in organizations, particularly those working in global contexts. We have synthesized a wide range of research and experience from different countries and organizational settings. We hope that leaders, managers, staff and internal and external diversity change agents can draw on this knowledge base to make strategic choices and craft an approach to working with diversity that is appropriate and tailored to their organization's specific needs and aspirations.

C. FRAMEWORK FOR THE PAPER

To guide readers in their thinking about how to work with diversity, we have structured the paper around three guiding questions central to designing an effective diversity initiative.

- **Motive forces.** *What are the motive forces driving our need to work more intentionally with diversity?* Diversity efforts are most effective and sustainable when they are tied explicitly to the strategic objectives of the organization. This means that each organization needs to undertake a strategic analysis to define the key reasons—or motive forces—for working with diversity in a meaningful way. The material in Chapter II helps organizations define *why* they should commit to working intentionally with diversity.
- **Analytic approach.** *How do we define and understand diversity in a way that is meaningful for this organization?* It is important for organizations to ground their vision of diversity in their specific context and develop an operational definition that focuses on the dimensions of diversity that are most salient for strengthening their organizational effectiveness and efficiency. The material in Chapter III helps organizations decide *what* aspects of diversity should be addressed and how diversity should be defined.
- **Change strategies.** *Which change strategies, methods and tools will be most effective given our objectives and approach to working with diversity?* A range of change strategies can be used to strengthen an organization's capacity to work with diversity effectively. These need to be tailored to the specific context and goals of the organization. Often, several of these need to be used together to make significant progress. The material in Chapter IV helps organizations define *how* their diversity initiative should be designed and implemented.

D. USING THE PAPER

The paper provides a knowledge base of research and experience for reflecting on diversity and its implications at the level of the organization as a whole, the work group, interpersonal relations and individual experiences. It is designed to challenge and stimulate new ways of thinking about diversity and the practice of *working* with diversity. However, we do not believe that the real work and excitement of working with diversity will not come from reading this paper alone. It will come from exploring the ideas and knowledge presented, discussing these and their implications with colleagues, leaders, clients, and partners and reflecting upon how they can be used to stimulate effective work with diversity within a specific organizational setting.

We suggest that this paper can serve most usefully as a catalyst for advancing work on diversity if readers, preferably of diverse backgrounds and representing diverse organizational viewpoints, review together the following questions (as a start) and engage each other in reflection and discussion (see Box 1-1).

Box 1-1
Reflection Questions

Ideas and concepts

- What insight does the paper generate about your own meanings and ways of working with diversity?
- What insight does the paper generate about diversity dynamics within your organization or work group?
- What intrigues you about the ideas presented? What ideas attract you? What ideas disturb you?
- What ideas are most relevant to your organization and its context? What ideas are less appropriate or relevant?
- What things would you like to know more about, understand better and get more information on?

Approaches

- What are the strategic forces for working on diversity most relevant to your organization?
- Which dimensions of diversity are most relevant for your organization or work group?
- What approach for working with diversity would or would not work in your organization? (Challenge each other about your initial assessments.)
- What types of specific interventions have already been implemented? What other interventions might be most useful for your organization?

Potential next steps

- Develop and discuss scenarios about how to use the knowledge you have gained from reading this paper.
- What are you willing to do, personally, to act upon the ideas and actions suggested by this paper?
- What suggestions do you want to make to the leaders and managers in your organization or work group about how to proceed in developing an initiative to work on diversity?
- Think about: What would such an initiative look like? How would it work? What would you and your organization want out of it? How much would it cost? How would the organization start? What would the organization gain? What would individuals gain? What could people and the organization lose? Should the organization work on this internally or are external sources of expertise also needed? What would be the motivating forces for working on diversity? What would be the greatest obstacles or sources of resistance?

II. MOTIVE FORCES

An organization setting out to work with diversity needs to develop an approach that is responsive to its specific context, mission and strategic objectives. Experience has shown that a diversity effort needs to serve an organization's strategic goals if it is to be effective and sustained. A crucial first step, therefore, is to identify the key reasons—or motive forces—for working with diversity in a systematic and intentional manner. This is what many experts call “building the business case” for diversity.¹ Drawing on the literature and other organizations' experiences, we identify nine motive forces for focusing explicit attention and resources on diversity (see Box 2-1). We have selected those most relevant to organizations with knowledge workers and those working in international settings. Under each motive force, we briefly summarize the benefits that can accrue to the organization from diversity and some of the cautions and challenges that have become evident from research and experience.² These motive forces can be used as a starting point for an organization to develop a compelling vision and rationale for working on diversity.

A. ENHANCING INNOVATION, CREATIVITY AND PROBLEM-SOLVING

Diversity can enhance creativity and innovation. It can broaden and deepen the reservoir of skills, talents, ideas, work styles, and professional and community networks upon which an organization can draw.³ This becomes increasingly important as organizations address more complex problems and seek to respond nimbly to rapid changes and new opportunities in their environments. Diversity in perspectives, knowledge and experiences derives from disciplinary and professional training and occupation specialization. But, it also derives from diverse demographic characteristics, such as age, race, ethnicity, nationality, gender, class and sexual orientation, which shape the life experiences, expectations and worldviews of individuals.⁴ “In short, [group identities] provide the lenses through which people view and experience their world” (Thompson and Gooler, 1996: 404).

With respect to working with diversity in practice, research on the link between diversity and innovation has shown mixed results. Results vary depending on the dimensions of diversity examined, the type of task, the time frame for the project, the proportional representation of different groups, and the organizational context.⁵ At the macro organizational level, several studies have shown positive correlation between innovation and the systematic use of heterogeneous workforces and management teams in terms of functional specialization, age and sector experience.⁶ Most of the research on the relationship between diversity, on the one hand, and innovation and creativity, on the other, has been conducted on teams or work groups. The research on a variety of dimensions of diversity shows that, in general, diverse groups excel in generating a wide range of high quality ideas and alternative solutions in problem-solving and decision-making. However, they perform less well than homogeneous groups in generating final solutions.⁷

Box 2-1

Motive Forces for Attending to Diversity

- *Enhancing innovation, creativity and problem-solving.* Organizations are seeking to expand the knowledge resources and perspectives available for addressing problems, developing innovative approaches and solutions, and identifying new opportunities.
- *Strengthening collaborative modes of working.* Organizations are relying increasingly on work tasks and strategies that bring people together to produce a common or interrelated set of products or services. The need to work effectively with diversity is accentuated with the greater interdependence among members of teams, partnerships and alliances.
- *Gaining broader access to clients, beneficiaries, investors, and other stakeholders.* Organizations committed to innovation and impact are seeing diversity as instrumental to tapping into new knowledge networks, gaining access to new clients, markets or bases of operation, or attracting new types of investors or stakeholders.
- *Responding to changing workforce demographics.* Organizations committed to recruiting high quality staff are responding in a systematic way to the changing composition of the workforce. Changes reflect expanding globalization and increased participation of women and members of other social groups that have historically suffered from discrimination in diverse countries of the world.
- *Improving retention of high quality staff.* Organizations seeking to retain high quality staff in a competitive marketplace are investing significantly in creating work environments that are supportive for staff of diverse backgrounds. Significant savings accrue from reduced turnover.
- *Enhancing operational effectiveness.* Experience has shown that a focus on diversity is often a catalyst for reviewing established operations and management systems and identifying opportunities for improving their effectiveness and efficiency. New systems developed to make global operations more effective often open up new ways of thinking and working.
- *Promoting social justice and equity.* Many organizations hold social justice and equity as a core value. For social and economic development organizations, social justice is often central to their mission. These organizations focus on diversity because they believe that they need to align their values and foster equity both within their organization as well as in their programs, products, and services.
- *Responding to organizational mandates and directives.* Some organizations take on diversity initiatives in response to priorities established by boards, funders, clients or other stakeholders. This type of external pressure can also include responding to legal pressures and mandates, such as complying with governmental mandates and country laws against discrimination.
- *Excelling in performance and industry reputation.* Organizations are increasingly viewing their work with diversity as a critical factor in establishing their reputations as progressive and innovative places to work in the industry. This in turn strengthens their ability to attract the “best and the brightest” in competitive global and national markets.

The research further suggests that in more complex and long-term tasks, such as those typical of research, the benefits of diversity for innovation and creativity can best be realized when diversity is addressed specifically and group processes are managed to ensure inclusion, mediation of conflict and transparent decision-making.⁸ Research conducted by Watson et al. (1993) illustrates this point. They examined the impact of racial-ethnic diversity on the performance of teams undertaking complex tasks over a long period. The teams were given periodic feedback and coaching on their team process and performance over the duration of the task. They found that, initially, homogeneous teams had more effective team processes and higher performance than the teams with diverse membership. However, by the end of the task period, the two groups reported equally effective team processes and overall performance was the same. Consistent with other research, the diverse teams scored significantly higher on the breadth of perspectives and alternatives generated for problem-solving.

These findings reflect the challenge of working with diversity. While diversity broadens the resource pool of ideas, perspectives, knowledge and work styles, it can also reduce team cohesion, complicate communication and heighten conflict (see Section B below). Recent research from Jehn et al. suggests that shared values that are related to the task or the work to be carried out can reduce the potential for conflicts in diverse groups. These shared values, which are often found in mission-based organizations, provide a foundation from which members can engage in “the difficult and conflictual process that may lead to innovative performance” (Jehn et al., forthcoming: 37).

B. STRENGTHENING PARTNERSHIPS, ALLIANCES AND TEAMS

Increasingly, organizations are using project teams and strategic partnerships to address complex work challenges, access broader pools of knowledge, reach a wider range of clients, respond to their environments with more flexibility, and improve quality and quantity of work outputs.⁹ The movement towards teams and partnerships accentuates issues of managing diversity because it brings together people of diverse backgrounds and areas of expertise who have become accustomed to working independently or in clear hierarchical relationships.¹⁰ The opportunities technology now offers for “virtual” teams also increases the frequency and means by which people of diverse backgrounds are brought together to share information and work on common problems.¹¹ The movement towards partnerships further accentuates diversity by bringing together people who not only have diverse backgrounds and areas of expertise, but also come from different organizations with distinct traditions, cultures and operating systems.¹²

As noted above, diversity within these collaborative arrangements creates a paradox. On the one hand, it is the driving force for collaboration—the desire to bring diverse perspectives, knowledge and experiences to bear on complex problems and opportunities. On the other hand, it raises significant challenges for managing collaboration and optimizing performance. The very differences that enrich the potential for teams and partnerships to innovate and do new kinds of work are the same differences that can undermine team cohesion, member satisfaction and overall team functioning.¹³ This correlation between team diversity and reduced team cohesion has been found for different dimensions of diversity, including age, tenure, functional and disciplinary specialization, as well as race and ethnicity. Diversity in gender has yielded mixed results.¹⁴

McGrath et al. (1995) gives three explanations for the impact of diversity on group or team interaction. The first is based on what Sessa and Jackson (1995) call one of the most robust principles in psychology—that people are attracted to others with similar attitudes.¹⁵ Since group cohesion is defined by the attraction of members to others in their group, homogeneous groups will be more cohesive. The second is that demographic differences (e.g., race, nationality, gender, sexual orientation) evoke expectations by other group members that can result in in-group biasing and stereotyping of others.¹⁶ And third, members of different demographic categories come to the group with varying statuses and levels of power. These are based on differential access to resources and influence both within the organization and in the larger society. Members of dominant groups have greater influence in shaping interactions and outcomes. Members of subordinate groups may lose their voice and become marginalized within the group.¹⁷ Steps that have been found to mitigate such “process losses” include explicitly recognizing differences rather than ignoring them; building shared values and norms; defining superordinate goals for the group; establishing process and decision-making rules; reducing hierarchy and status differences; sharing power; providing external feedback to the group on team functioning; ensuring group accountability; fostering equal participation and mutual respect; and developing effective communications.¹⁸

In sum, the research on diversity in teams and work groups is quite consistent in showing that while heterogeneous teams may have the potential for higher performance, they tend to have less cohesion and function less effectively than homogeneous groups. Again, the research suggests that negative impacts are reduced and benefits enhanced when explicit attention is given to ensuring effective group process.¹⁹ Adler (1986: 111), reflecting on the interaction of cultural diversity on work team performance in international settings, underscores the importance of working intentionally with diversity:

Highly productive and less productive teams differ in how they manage their diversity, not, as is commonly believed, in the presence or absence of diversity. When well managed, diversity becomes a productive resource to the team. When ignored, diversity causes process problems that diminish the team's productivity. Since diversity is more frequently ignored than managed, culturally diverse teams often perform below expectations and below the organization's norms.

C. GAINING BROADER ACCESS TO CLIENTS, INVESTORS AND OTHER STAKEHOLDERS

As organizations respond to changing demographics in the countries in which they operate and/or become more global, they see diversity as a means to enhance their ability to gain access to new markets or bases of operation, respond effectively to new clients or beneficiaries, and engage new types of investors or stakeholders. Many organizations want to ensure that they have staff with relevant knowledge of the locations in which they are working and mechanisms to use that knowledge in strategic and operational decision-making. They also want to ensure that the diversity of their clients is represented when they are designing, evaluating, marketing and delivering services and products.²⁰ Diversity can also enhance an organization's ability to interact with and respond effectively to its environment.²¹ Greater diversity among staff members' networks makes it more likely that information of strategic importance will be brought to the organization in a timely way and that a greater number of potential clients and investors will learn about the organization. Competence in working with diversity is also becoming

increasingly important as an asset for attracting and developing international strategic partnerships, which is an issue of increasing importance to many global organizations.²²

While all of this is highly beneficial to an organization, research and experience have shown that care must be taken to ensure that the diverse staff members, who are recruited to help develop new markets, expand the client base or develop new regional activities, do not get marginalized as niche contributors.²³ Often the ability of these staff to move up or move horizontally in an organization is constrained because top managers see their competence lying in their regional or client expertise, not in the full set of skills and competencies they bring to the organization.

D. RESPONDING TO CHANGING WORKFORCE DEMOGRAPHICS

The composition of the workforce in countries around the world has altered dramatically in the past two decades.²⁴ The most dramatic change has been in gender composition. Women have moved increasingly into the formal employment sector and upward into professional and managerial positions. Related to this trend is the dramatic rise in dual career couples. In addition, with globalization, the immigration of ethnic groups and improved career opportunities for ethnic or racial minorities, organizations in many countries are increasingly engaged in recruiting high quality staff from diverse pools around the world. Age diversity is also becoming more pronounced in organizations as workers retire later.²⁵

The change in demographics has direct implications for recruiting practices. Many organizations recognize that being able to attract and retain the best talent available in the world market is critical to maintaining excellence in staffing and competitive advantage. Developing a reputation as a supportive place for staff members of diverse backgrounds to develop their careers is a valuable asset when competing for high quality talent.²⁶

E. IMPROVING RETENTION OF HIGH QUALITY STAFF

Organizations often give priority to recruitment in their diversity efforts. However, retention is equally, if not more, important. Organizations that have sought to work effectively with diversity have learned that it takes more than simply incorporating people of different backgrounds, areas of expertise and perspectives, and assuming that they will fit. Often significant changes in management systems, work practices and organizational norms and values are needed to create work environments in which all employees feel valued and supported in making their fullest contribution.²⁷ If diversity is not attended to and such changes are not made, retention can become a problem. Organizations can incur significant costs from higher than average attrition and absentee rates for employees of non-dominant groups.²⁸

Employees who do not feel valued or supported, or whose values and work norms differ from those dominant in the organization, generally have less commitment to the organization. The dominant group may be defined, for example, by social identity (e.g. race or gender), culture or nationality, function, or discipline. The dominance can be shaped by proportional representation, the extent to which a specific group holds power, or the extent to which a group (or groups) defines the cultural norms and values of the organization. Research consistently documents higher turnover rates for employees who are different from the dominant group across a range of

dimensions, including age, tenure, gender, race, ethnicity, nationality, occupational specialization or educational background.²⁹ Similar patterns have been found for the relationship between diversity and absenteeism.³⁰ In more heterogeneous environments, individuals also tend to accentuate those cultural and behavior aspects that identify them as members of a specific group (e.g. their nationality, gender or race).³¹ Interestingly, research has also shown that as organizations or work groups become more diverse, even at modest levels, members of the dominant group also experience psychological discomfort and reduced commitment.³² As a result of these group dynamics, Cox (1993) found that culturally heterogeneous groups often perceive their work environments as less hospitable. These patterns reflect the tendency discussed above for individuals to identify with those who are similar to them on some personal attributes. This identification in turn increases attraction, enhances communication and reduces conflict, all of which foster cohesion and commitment to the group.³³ Greater cohesion and commitment reduce attrition.

High attrition rates result in obvious costs of recruiting and replacing employees who leave. For example, at Corning Incorporated in the United States, women and people of color were resigning at twice the rate of white men. Corning estimated the cost of replacing them was \$2 to \$4 million per year.³⁴ Similarly, Deloitte and Touche, LLP, a global accounting and consulting firm, launched its well-known Initiative for the Retention and Advancement of Women specifically to reduce the 30 percent annual attrition rate of women. The company estimates that their success in cutting the attrition rate by half and retaining more high quality women translated into a 10 percent increase in profitability for the partnership.³⁵

Turnover also results in the less tangible, but potentially more significant, cost of losing valuable knowledge and experience pertinent to the organization's business. This is particularly significant for professional firms or research organizations where the tacit knowledge of individuals is the organization's primary asset. For example, in a consortium of international research centers we have studied, the annual attrition rate for scientists was 23 percent.³⁶ This represents a very high cost in the loss of tacit research knowledge to the organizations. It also represents a significant operational cost of an estimated US\$3.6 million.

In sum, diversity in work groups creates challenges for building commitment and cohesion, particularly in cases where one group is dominant and other groups are seen as “the other” who are expected to fit into the dominant culture. The challenge is to create work environments that foster cohesion in the context of diversity. These are workplaces where norms are negotiated and policies, work practices and systems are sufficiently flexible to support people of diverse backgrounds and different ways of working and succeeding.

F. ENHANCING OPERATIONAL EFFECTIVENESS

Research and experience have shown that a focus on diversity is often a catalyst for reviewing established operations and management systems and identifying opportunities for improving their effectiveness and efficiency. It stimulates new ways of looking at established processes and often reveals innovative avenues for improvement.³⁷ Moreover, as organizations become more global, they are compelled to become more flexible and fluid in order to respond to diverse,

complex and changing environments.³⁸ Policies and procedures are broadened and operating procedures become less standardized as they are adapted to different contexts.

Firms that possess healthy multicultural environments will be much more likely to be able to respond to new pressures. Such firms will also be more likely to avoid the view that there is only one way to achieve success (Kossek and Lobel, 1996: 15).

A useful illustration comes from a large global technology company that redesigned its entire employee benefit package based on an analysis it carried out to develop domestic partner benefits for gay and lesbian employees.³⁹ The analysis revealed that few employees lived in the model family on which the company's long-standing benefits program had been based (breadwinner with spouse at home or working a secondary job and two children). Moreover, many employees had dependents outside of their immediate families whom they wished to cover under their benefits policies. These data showed that the benefits policy was based on outdated assumptions of families that were inappropriate not only for gay and lesbian employees, but also for many other employees. In response, the company instituted a "cafeteria-style" benefits policy that kept costs bounded, but maximized flexibility and responsiveness to employees' specific needs.

In another example from an international research center headquartered in Mexico, the analysis of work practices through a gender lens revealed deeply entrenched norms that were undermining effective communications up and down the hierarchy and across work groups. Changes introduced were seen to enhance organizational effectiveness through the greater inclusion of relevant expertise in strategic decision-making, clearer understandings of and support for management decisions, and stronger feelings of inclusion and commitment by a wide range of staff.⁴⁰ Similar improvements have been documented across other related international research centers for changes stimulated by gender concerns in recruitment practices, promotion criteria, job categorization, performance appraisal and spouse employment policies.⁴¹

G. PROMOTING SOCIAL JUSTICE AND EQUITY

A commitment to social justice and equity is a driving force behind many organizations' efforts to work with diversity. For corporations this may represent a core value.⁴² For development and social change organizations, social justice and equity are often central to their mission and integral to their work. These organizations focus on diversity because they are seeking to achieve greater congruence between their mission and values and the realities of their internal culture, structures and work practices.⁴³ We have learned from work on gender that the organizations that have been most successful in addressing gender equity in their research and/or programming areas have also made an explicit commitment to address gender issues within their own workplace. The importance of congruent values would apply to other dimensions of diversity as well.

Addressing social justice and economic fairness in the workplace can also enhance organizational performance. For example, findings of recent research conducted in more than 40 manufacturing organizations in the United States indicate that workplace practices that promoted worker participation and involvement in decision-making produced benefits such as increased

productivity, better financial performance and higher target wages for workers, as well as reduced inventory, space requirements and excess labor costs.⁴⁴

H. RESPONDING TO ORGANIZATIONAL MANDATES AND DIRECTIVES

Clearly a driving force for organizations in many Western countries (and in countries such as South Africa and Australia⁴⁵ that are seeking to counteract histories of oppression) to work with diversity has been the legal requirements for equal opportunity and appropriate representation of members of groups that have previously suffered discrimination, such as women and people of color. In other contexts, organizations have begun to work with diversity in response to external pressure from stakeholders, investors or activist groups in the society advocating for equity in opportunities for people of diverse social and cultural backgrounds.⁴⁶ Experience has shown that external support and, in some cases, pressure for equal opportunities for diverse employees is an important motivator for organizations to address diversity. The caution emerging from these experiences, however, is that when organizations are responding to external mandates and pressures alone, they tend to focus solely on issues of representation, or what Kossek and Lobel (1996) call “diversity enlargement.” The focus on numbers, while useful for monitoring change, does not necessarily lead to the kind of in-depth inquiry and sustained organizational change required to work with diversity in a comprehensive and meaningful way (see Chapter IV).

I. EXCELLING IN PERFORMANCE AND INDUSTRY REPUTATION

Organizations are increasingly viewing their work with diversity as a critical factor in establishing their reputation as high performing, progressive and innovative places to work in the industry. Some recent research has shown a positive correlation between diversity and the economic performance of companies.⁴⁷ This reputation in turn strengthens their ability to attract the “best and the brightest” in competitive global and national markets. In the United States, for example, many major companies seek actively to be recognized through nationally-recognized awards as the best places for women and/or people of color to work. A good illustration of how organizations connect diversity and industry reputation comes from the International Monetary Fund’s (1999: 2) policy on diversity:

The Fund is highly regarded for its economic expertise and technical work. To maintain the excellence in its technical quality, the Fund must strive to achieve and preserve the same high standards in its management and leadership, including excellence in diversity management. In order to be an “employer of first choice” for the strongest candidates, as well as for current staff, the Fund is committed to serving as a model for professionalism, adaptability, diversity, (and) fairness.

To build a reputation as a supportive and stimulating place for people of diverse backgrounds to work and succeed, organizations need to ensure that diversity is reflected at all levels of the hierarchy, as well as horizontally across departments and operational areas. Potential employees need to be able to see staffing patterns and conclude that they will be able to take on meaningful work and advance in the organization no matter what their race, sex, nationality or sexual orientation. A diverse leadership group suggests that an organization has drawn a wide pool of talent up through its ranks and is opening itself to a variety of views and ideas.⁴⁸ In contrast, if the top management of the organization is populated largely by people of similar backgrounds and areas of expertise, this signals that only certain types of people can succeed. Organizations

can enhance their reputations as innovative and inclusive organizations by ensuring that they have representation of women and men of diverse racial and national backgrounds from countries of the global North and global South across all levels of the hierarchy.

J. SUMMARY

In summary, there are strong motive forces for organizations to address diversity. These reflect commitment to both equity and excellence. As is clear from the research and experience reviewed in this chapter, diversity can bring significant benefits to organizations. But, diversity also brings challenges. The clear lesson from this review is that diversity is unlikely to lead to improved organizational performance or equity unless it is recognized explicitly as an asset and is worked with intentionally and systematically throughout all aspects and areas of the organization. To integrate work on diversity into the fabric of the organization, staff and managers need to reflect on and be very explicit about *why* they are addressing diversity and *what outcomes* they expect. Without such clarity, it will be difficult to overcome resistance to change and sustain commitment to the diversity efforts. The motive forces reviewed in this chapter provide a starting point for an organization to develop its strategic rationale for working with diversity. In the following chapter, we provide a framework to help organizations reflect on *how* they want to define diversity, given their strategic objectives for working with diversity and the specific context(s) in which they are operating.

III. ANALYTICAL FRAMEWORK

A. LENSES ON DIVERSITY

Once an organization has carried out an analysis of motive forces for working with diversity (see Chapter II), the second step is to define an approach and understanding of diversity appropriate for the organization. While there are many aspects of diversity, we believe it is important for an organization to focus on those aspects that are most salient for its mission, its strategic organizational objectives, its work, its historical context and its operational objectives for working with diversity. For example, an organization with a largely western, Caucasian, male professional workforce may elect to focus on working with gender diversity or functional diversity during the initial stages of a diversity initiative. Alternatively, an organization that has recently had a significant change in the composition of its staff by race and ethnicity may elect to focus on that aspect of diversity first. Diversity in international organizations is among the most complex. Staff members are diverse along multiple dimensions of identity. Stakeholders, partners, clients and beneficiaries represent a wide range of cultural, social, economic and political systems. And, the organizations' work is targeted to a plurality of regions and countries with diverse political, agro-ecological, and socio-economic conditions. This is why it is so important to tailor a diversity initiative to a specific context.

To assist organizations in developing an operational definition of diversity and selecting an approach that is most relevant, we have synthesized the literature and experience on diversity into three primary approaches, or lenses.

- *Social differences lens* - focuses on differences shaped by membership in identity groups that reflect salient social categories.
- *Cultural differences lens* - focuses on cultural differences of diverse nationalities or ethnic groups.
- *Cognitive-functional lens* - focuses on diversity in task-related knowledge, skills and experiences as well as differences in styles by which individuals access information and acquire knowledge.

These lenses represent distinct and major streams of work on diversity. When focused on organizations, all of these lenses help to shine light on how differences in group affiliation affect the organization's work culture, systems and work practices, as well as its social relations. They also reveal the effect on the behavior, and work and career outcomes of individual staff members. The lenses differ primarily in the types of group differences treated. Each lens illuminates specific dimensions of diversity and occludes others, as in a figure ground in which one image is predominant over another depending on the angle of viewing. The variations in emphasis of the three lenses can be seen through definitions of diversity employed (see Box 3-1).

Below we describe each lens with a discussion of the major ways in which it has been applied in organizations and our assessment of its specific advantages and disadvantages. We conclude with a section on strategic issues that need to be considered when selecting and using any of these lenses for working on diversity.

Box 3-1

Definitions of Diversity Using Different Lenses

Social differences lens

- “Diversity refers to diversity in identities based on membership in social and demographic groups and how differences in identities affect social relations in organizations. We define diversity as a mixture of people with different group identities within the same social system” (Nkomo and Cox, 1996: 338).
- “Diversity focuses on issues of racism, sexism, heterosexism, classism, ableism and other forms of discrimination at the individual, identity group and system levels” (Cross et al., 1994).
- “Diversity should be understood as the varied perspectives and approaches to work that members of different identity groups bring” (Thomas and Ely, 1996: 80).
- “The concept of diversity . . . can encompass a broad range of differences. . . . But it is those features that make us like some specified group of people and different than other groups that constitute the principal thrust of much [of the] current work on diversity in organizations. Thus, diversity in organizations is typically seen to be composed of variations in race, gender, ethnicity, nationality, sexual orientation, physical abilities, social class, age and other socially meaningful categorizations, *together with the additional differences caused by or signified by these markers* [emphasis added]” (Ferdman, 1995: 37).

Cultural differences lens

- “Diversity exists both within and among cultures; however, within a single culture certain behaviors are favored and others repressed. The norm for a society is the most common and generally acceptable pattern of values, attitudes and behavior. . . . A cultural orientation describes the attitudes of most of the people most of the time, not all of the people all of the time. Accurate stereotypes reflect societal or cultural norms” (Adler, 1986: 17).
- “The term multicultural diversity competence refers to the ability to demonstrate respect and understanding, to communicate effectively and to work collaboratively with people from different cultural backgrounds” (Garcia, 1995).

Cognitive-functional lens

- “Cognitive diversity focuses on the way people take in information, the way they internalize the information and analyze it, and the way they apply the information. Cognitive diversity embraces the spectrum of styles by which individuals acquire knowledge. At the heart of cognitive diversity is the appreciation and acceptance of differences in perceiving, reasoning and problem solving” (Idea Connections, training materials, copyright protected).
- “New sources of diversity from within the organization [include] employees from nontraditional lines of business, functions that have an historically subordinate role, or a newly acquired subsidiary with a distinctive culture” (Kossek and Lobel, 1996: 2).

Broad definitions

- “Diversity among people reflects the many characteristics that make us who we are, including nationality, race, culture, ethnic background, gender, age, religion, native language, physical ability, sexual orientation, education and profession” (International Monetary Fund, 1999).
- “Diversity refers to any mixture of items characterized by differences *and* similarities. . . . Diversity refers to the collective [all-inclusive] mixture of differences and similarities along a given dimension” (Thomas, 1995: 246).

B. SOCIAL DIFFERENCES LENS

The social differences lens focuses on identities, specifically identities that are based on membership in groups that reflect salient social categories, such as race, gender, ethnicity, class, age or sexual orientation. These are categories that can be viewed as socially marked or valenced, meaning that they are significant in shaping how societies are organized and how individuals within societies categorize themselves and others.⁴⁹ Often these categories shape the distribution of roles, power, opportunities and resources in societies. As a result, in many societies, these identity categories are “legislated” to prevent discrimination and ensure equal opportunities.⁵⁰

The social differences lens draws primarily on the fields of sociology and organizational behavior. It reflects three primary streams of research and practice: 1) social identity theory; 2) race and gender research and practice; and 3) organizational demography.⁵¹ This lens focuses on how differences among group identities affect social relations, work behaviors, distribution of opportunities and work outcomes in organizations. The lens recognizes that “individuals do not leave their racial, gender or ethnic identities at the door when they enter an organization” (Nkomo and Cox, 1996: 342).

A clear concept of identity is fundamental to this lens. Alderfer and Hurtado both offer useful definitions:

an [identity] group [is a group] whose members . . . have participated in equivalent historical experiences, are currently subjected to similar social forces, and as a result have consonant world views (Alderfer, 1987).

Social identity is deemed as those aspects of the individual’s self-identity that derive from one’s knowledge of being part of categories and groups, together with the value and emotional significance attached to those memberships (Hurtado, 1997: 307).

Hurtado emphasizes that identity is partially defined through the relationships among diverse groups. She sees social identity as shaped by both social categorization and social comparison in which characteristics of one group (e.g., status or power) achieve significance in relation to perceived differences from other groups.

Drawing on the various streams of theory and practice that inform the social identity lens, we have distilled five elements that are critical when using this lens to work with diversity in organizations.

- Identities are socially constructed.
- Identity is multi-dimensional.
- Identity is defined by self-identification as well as categorization by others.
- Social categories and identities embody differences in power and privilege.
- Identities shape cognition, experiences, worldviews and perspectives.

The following sections offer an expanded explanation of these five elements.

1. Identities are socially constructed

Identity is not innate or essential, but socially constructed.⁵² Identity is defined by the cultural, historical, social and political context in which an individual or a group is operating. It is this context that shapes the meaning and import of different social categories and the experiences of members who identify with specific groups. For example, the identity of being black in South Africa is constructed very differently from that of being black in Ethiopia where there has not been a potent legacy of colonial oppression and apartheid. The differences in social construction of black identity in these two contexts will result in different identity experiences for individuals and have different impacts on the opportunities available to them. As Cock and Bernstein (1988: 23) argue, “Considering differences in an ahistorical, sociopolitical vacuum lacks any explanatory power, and renders ‘diversity’ an empty concept.”

The socially constructed nature of group identities can result in structural differences in societies and organizations that create privilege for some and disadvantage for others.⁵³ Gender, race, ethnicity, sexual orientation, class, religion and age are all identity categories that have operated in this way across different social and historical contexts. Applying this lens in an organizational context helps to illuminate the source and impact of both overt and subtle structural differences on work and career outcomes of members of different identity groups. Historically this has been the dominant focus of scholars and practitioners using this lens. However, it is important to stress that social construction of identity also shapes the cognitions, experiences, perspectives, values and worldviews of people belonging to specific identity groups.⁵⁴ In this way, this lens also illuminates “the varied perspectives and approaches to work that members of different identity groups bring by virtue of their different life experiences” (Thomas and Ely, 1996: 80). This variety in perspectives and experiences is a knowledge asset that organizations are increasingly trying to optimize (see Chapter II).

2. Identities are multidimensional

Identity is multifaceted and fluid. Individuals have multiple identities and “identities intersect to create an amalgamated identity” (Nkomo and Cox, 1996).⁵⁵ How identities interact and which aspects of identity are salient depend on the organizational context in which the person or group is functioning. Hence, being a foreign national might become a salient dimension of one's identity in a work group or organization where the majority of members represent a single nationality. But in a multicultural work group of professionals from similar fields, the individual's age or gender identity might be a more profound marker of difference or similarity. Similarly, individuals within social groups and across different contexts differ in the relative importance they assign to any particular social identity based on their self-concept.⁵⁶

Attention to the multifaceted nature of identity has important implications for working with diversity in organizations. It focuses attention on the variability of experiences among people sharing one common dimension of identity such as gender, but differing in other dimensions such as ethnicity or race. It also underscores the complexity and challenge of working with diversity in organizations. Research in the United States and South Africa, for example, shows how women of color and working class women tend to be “disappeared” in organizational change efforts aimed at promoting gender equity (see Box 3-2).⁵⁷ Issues, experiences and concerns of white, middle-class, heterosexual and professional women as the dominant identity

group have tended to capture the change agenda. Even among professional women as a group, the experiences of white women have overshadowed those of women of color.⁵⁸ The lesson is that when multiple identities are not attended to, the experiences of some groups inevitably become marginalized and silenced.

Recognizing multiple dimensions of identity also helps us understand why it is often difficult to form alliances among members of diverse identity groups along a single dimension of identity, such as gender or race.⁵⁹ For example, focusing again on gender, the experiences and priority concerns of women at upper and lower levels of the hierarchy in organizations are usually very different. Women at senior levels may focus on “glass ceiling” issues of advancement, opportunities for mentoring and access to informal networks. Women at the lower levels may focus on issues of support for childcare, work schedule flexibility, sexual harassment and salary parity. Blindness to these differences sets up false expectations of shared interests as the basis for forming coalitions for change (see Box 3-2).

3. Identity is defined by self and others

Identity is defined relationally. It is a category with which individuals identify and a category to which others assign the individual.⁶⁰ It is important to recognize that not all individuals within a group view a specific dimension of identity in the same way or as equally important. Regarding categorization by others, it is important to understand that even when people do not self-identify with particular identity groups, others often categorize them as belonging to those groups, especially when physical or other markers are visible.⁶¹ This, in turn, can affect others' expectations of an individual's values, work practices or interpersonal styles (whether or not these are justified). These dynamics can be thought of in terms of stereotyping, schemas and dominant group identities.

a. Stereotyping

Stereotyping is the most blatant result of identity defined by others. Stereotyping is the process of making generalizations about a person or a group based on a perceived difference and little information about them. But it is important to remember that the process of categorizing is often subtle and unconscious, based on an individual's past experiences with members of a specific identity group or cultural and familial learning that have been part of their socialization process. The more competitive the relationship between the in-group and out-group, the more negative the stereotypes that each group has about the other.⁶²

b. Schemas

Valian (1998), in her concept of schemas, stresses that we all carry a set of implicit, or unconscious, hypotheses about different social groups. We draw on these hypotheses, or cognitive frameworks, to categorize new individuals. These schemas also shape our expectations of people of different identity groups, our evaluation of their work and our interpretations of their behaviors. Schemas are natural ways of organizing the world. However, as long as they operate at the unconscious and unarticulated level, they inadvertently influence our interpretation and evaluation of others' behaviors in either an overly positive or negative manner. For example,

Box 3-2

Implications of Multiple Dimensions of Identity for Fostering Gender Equity in Organizations - Case Examples

The following two examples focus on issues of work-personal life integration. They illustrate the challenges and importance of working with multiple dimensions of identity in diversity initiatives. Organizational interventions aimed at fostering gender equity can have varied impacts on different groups of women depending, for example, on their race or class.

Case example - Race and gender intersections, USA

Ely and Meyerson (1998: 3) illustrate how aspects of identity, such as race and ethnicity, shape some women's experiences in the organization differently from others: “although women of all ethnicities had difficulty moving ahead, the patterns of derailment were different for white women than for women of color. In particular, stereotypes about white women—that they are organized, efficient and productive—kept them in front-office, nine-to-five, staff jobs. In contrast, stereotypes about women of color—that they are less productive but more willing to work nontraditional hours—kept them in equally low-level staff jobs, but doing the kinds of behind-the-scenes, around-the-clock work that the organization ostensibly required to keep it running smoothly. Needless-to-say, these two forms of “ghettoization” had different impacts on the two groups of women. Although both groups were essentially sealed in dead-end jobs, these placements created more childcare problems for women of color than for white women, whose nine-to-five jobs made it easier for them to rely on traditional childcare arrangements. Women of color were absent from work more often than their white counterparts because of the difficulties they had finding reliable, affordable childcare during their work hours, which further reinforced the perception of them as less efficient and less productive.”

Case example—Race and gender intersections, South Africa

Marks (forthcoming) illustrates the impact of multiple dimensions of identity on a gender equity initiative in a parastatal in South Africa. As a part of its organizational transformation process after the dismantling of apartheid, the organization reviewed its internal structures and operating systems. In response to equity concerns raised by a women's forum, management created two positions: a gender coordinator for the Gender Unit and an officer for the Affirmative Action Unit. The two units were expected to integrate their work as far as possible. Over time, however, the racial differences among women in the organization became more visible and explicit. The work of the Gender Unit and the women's forum became associated with the issue of white women, who were generally at higher levels of the organization. Black secretaries, for example, did not feel that “real issues” of career advancement, salaries and work schedules that they found most pressing were being addressed by the Gender Unit. At the same time, the work of the Affirmative Action Unit focused on issues of black staff, but here women were a less privileged constituency than men. Again, their priority issues were not at the top of the change agenda. Because both these “disappearing” processes focused on gender as white and race as masculine, women of color and the issues that concerned them most remained marginal in the organization.

Ferrari (1972), studying international teams in an intergovernmental organization, found that schemas about people from developed or developing countries defined perceptions of competence. At the formation of new teams, individuals *a priori* assessed those members who were from developed countries as more competent and qualified. Once people had worked together in team context, these implicit rankings disappeared.⁶³ Alderfer (1992), in a long-term study on race relations in a major corporation in the United States, shows how race schemas shape staff perceptions of equity of opportunities in advancement. He found, for example, that the vast majority of white women and men agreed with the statement that “Qualified blacks are promoted more rapidly than equally qualified whites,” while the vast majority of black women and men agreed with the statement that “Qualified whites are promoted more rapidly than equally qualified blacks.” These examples illustrate the importance of understanding the schemas that are shaping individual's categorization and expectations of others in any given organizational context as a critical first step in working with diversity.

c. Dominant identities

One of the most interesting dynamics in self-identification and categorization by others is the tendency for those who belong to traditionally dominant groups in organizations (such as white professional men in organizations of Western industrialized countries) *not* to identify consciously with their identity group. They perceive their identity group implicitly as “the norm” by which every other group is categorized as “the other” (see Box 3-3).⁶⁴

A recurrent finding in the study of whiteness is the fact that white respondents do not consider their ‘whiteness’ as an identity or marker of group membership per se. That is, whiteness is a ‘natural identity’ because it has not been problematic and therefore salient to most respondents in these studies. In fact, most white respondents are hard pressed to define whiteness and the privileges that it brings to those who own it. Interestingly enough, whiteness becomes much more definable when the privilege it accords its owners is lost. (Hurtado and Stewart, 1996: 299).

Yet, the experience of members of dominant identity groups in organizations is very much shaped by their own and others' schemas, or expectations, of the opportunities, power and status that accrue to members of such groups. There is a significant body of research on diversity in work groups in Western countries and international teams, for example, that shows that members of dominant and higher status identity groups typically display more aggressive nonverbal behaviors, speak more often, interrupt others more often, state more commands and have more opportunity to influence.⁶⁵

The implication for work on diversity is that attention should not be restricted solely to seeking to understand the schemas that shape expectations and interpretations of behaviors of people in identity groups with minority representation or “newcomer” status. It is equally important to understand and try to make more explicit the schemas that define norms and expectations of members of dominant or established groups.⁶⁶ This type of analysis deepens understanding of the subtle processes that can lead to accrued privilege and status for some while disadvantaging others (see Box 3-3). It can also help to identify areas of shared interest, so that members of dominant groups can ally with other groups in promoting organizational change aimed at supporting diversity.⁶⁷

Box 3-3
Making White Privilege Visible

“White Privilege: Unpacking the Invisible Knapsack” is a powerful reflective essay by Peggy McIntosh (1990). As a feminist scholar and practitioner seeking to understand the invisibility of male privilege, she adopted the viewpoint of a white person and undertook a reflective examination of her own unearned privilege, as a white person in the United States. She recognized that as a white person she had been taught about racism as something that puts others at a *disadvantage*. She had not been taught to see the corollary that white privilege is something that put her at an advantage. She concludes that whites are carefully taught not to recognize white privilege, just as men are taught not to recognize male privilege. “For me white privilege has turned out to be an elusive and fugitive subject. The pressure to avoid it is great, for in facing it I must give up the myth of meritocracy.”

To make privilege visible and tangible, she constructed a list of 50 advantages that she experiences on a daily basis as a white person in the United States, including the following:

- I can open the front page of the paper and see people of my race widely represented.
- I can be pretty sure of having my voice heard in a group in which I am the only member of my race.
- I can be casual about whether or not to listen to another person's voice in a group in which s/he is the only member of his/her race.
- I can do well in a challenging situation without being called a credit to my race.
- I am never asked to speak for all the people of my racial group.
- I can be pretty sure that if I ask to talk to the “person in charge,” I will be facing a person of my race.
- If I have low credibility as a leader, I can be sure that my race is not the problem.
- I can take a job with an affirmative action employer without having co-workers on the job suspect that I got it because of my race.

McIntosh and other scholars argue that white privilege and other forms of dominance, such as male privilege or the privilege conferred to nationals of countries in the North, are embedded in the social and organizational systems that we take for granted. “I was taught to see racism only in individual acts of meanness, not in invisible systems conferring dominance on my group.” These systems appear neutral and natural, yet they inevitably and systematically reproduce advantage for some and disadvantage for others.

4. Diverse social categories and identities embody differences in power and in status

The social categories that flow from social differences are rarely neutral. These categories often mark differences in status and social power among groups and determine specific groups' relative access to resources and power within organizations and the broader social system. In this way, not all dimensions of diversity have equal import for shaping social relations and work outcomes

in organizations. To understand diversity dynamics and work effectively with differences in organizations, it is important to give explicit attention to the nexus between social differences and power relationships within organizations and the larger society(ies) in which they are embedded. These status and power differences get reproduced in organizations and are embedded in organizational structures, policies, norms and work practices. In this way, they subtly confer privilege to some groups and disadvantage to others. As a result, different identity groups have very different experiences and opportunities within organizations and these differences tend to accumulate and expand over time.⁶⁸ Nkomo (1996: 245) argues:

Diversity [in organizations] has its effects exactly because distinctions made on the basis of identity are not benign. . . . It is important to be aware of the 'relational' dimension of diversity. Dichotomies are created (black versus white, men versus women). However dichotomies are not symmetric. Someone or some group becomes the 'other,' and otherness has a very unique meaning for the socio-historically embedded categories of race, ethnicity, and gender. Differences between people based on these categories are grounded within structures of power inequalities and unequal access to resources.

Voiced in another way by an organizational practitioner, Dawn Cross, the Director of Diversity at Corning, Inc. in the United States, observes:

Because images of success in many organizations are based on traits [considered as norms for] white men, even the best-intentioned people try to get people of color and white women to fit the old image rather than creating new images of success (in Morrison et al., 1993: 13).

5. Identities shape cognitions, experiences, world views and perspectives

Historically, the social differences lens has been used to illuminate and address inequalities in organizations and to ensure equal opportunities for people of diverse identity groups. However, while not diminishing the importance of equality and justice in organizations, it is also important to view social identity differences as an asset, rather than solely as a problem to be fixed. Social identity shapes the way individuals are socialized and their experiences in families, communities and the larger society. In this way, it influences their worldview, perspectives, values and cognition. As discussed in Chapter II, this plurality of ways of viewing, experiencing and knowing the world is a valuable asset to organizations seeking to be flexible, innovative and responsive to diverse clientele or stakeholders.

Considerable research has explored the link between specific traits and identities, as, for example, in the field of women in management. Yet, results have been inconclusive.⁶⁹ This ambiguity in findings most likely derives from lack of attention to the influence of social and organizational context (see Box 3-4) and the impact of multiple identity group affiliation (see "Identities are multidimensional" Section B.2.). Moreover, traits, such as collaboration, performed by members of different identity groups, are perceived and interpreted differently, depending on the context of the organization and larger society. For example, Fletcher (1999) observed in her study of software engineers in the United States that collaborative or supportive work behaviors demonstrated by women were invisible and generally construed as "natural and nice." These were expected behaviors for women under the gender schemas operating in the organization and larger society. When men presented these same behaviors, they were more visible and recognized as contributing to effectiveness. They were labeled with terms such as "fostering team work," "anticipating problems," and "coaching."

Box 3-4**Changing Culture to Harness the Benefits of Diversity**

Cox et al. (1991), drawing on Hofstede's (1990) work on cultural differences (see next section), examined whether members of ethnic minorities in the United States (African Americans, Hispanics and Asians) with collaborative-cooperative cultural norms would opt more often for cooperative behavior in group settings than Anglos who operate from more individualistic-competitive norms. In a laboratory setting, they found that members of minority ethnic groups had significantly stronger cooperative orientations. They also found that the ethnically diverse groups made significantly more cooperative choices than groups comprised solely of Anglos. Importantly, however, they found that the difference was much more marked in contexts where the groups expected the other group to cooperate. The authors conclude that organizations cannot strengthen cooperative behavior and work practices in the workplace by simply hiring more members of ethnic groups with cooperative-collective norms as is sometimes assumed. Organizations will only benefit from this if the organizational culture changes and provides signals that cooperation can lead to mutual gain and will be reciprocated by cooperation.

Given the analytic complexities of associating specific traits with specific identity groups, we believe it is more useful to recognize that identity shapes experiences and to focus on how organizations can learn from the different perspectives, sources of knowledge, professional networks or ways of working that members of different identity groups bring to the organization. From this perspective, for example, Thomas and Ely (1996: 80) argue the importance of linking social identity differences directly to the work of the organization (see Box 3-5):

(Diverse staff) bring different, important, and competitively relevant knowledge and perspectives about how to actually do work—how to design processes, reach goals, frame tasks, create effective teams, communicate ideas, and lead. When allowed to, members of these groups can help companies grow and improve by challenging basic assumptions about an organization's functions, strategies, operations, practices, and procedures. And in doing so, they are able to bring more of their whole selves to the workplace and identify more fully with the work that they do, setting in motion a virtuous circle. . . . Only when companies start thinking about diversity holistically—as providing fresh and meaningful approaches to work . . . will they be able to reap its full rewards.

6. Relative emphasis on dimensions of identity

Age, sexual orientation and class are identity dimensions that have not received as much attention in research or practice on diversity. They are all clearly important and valenced categories influencing individuals' experiences in organizations and career and work outcomes. Social class and sexual orientation are more challenging to work with since visible markers are usually less salient.⁷⁰ In many cases, individuals have to make explicit choices about whether to identify themselves as homosexual or heterosexual, or as affluent or working class, and, thus, open themselves up to categorization by others.

Inclusivity is a challenge when visible identities trigger potentially judgmental or divisible reactions. . . . A distinct set of challenges arises when employees bring invisible, marginalized, or even stigmatized aspects of their identity into the workplace (Creed and Scully, forthcoming).

Box 3-5
Connecting Diversity and Work Practices

Thomas and Ely (1996) stress the importance of working with diversity in the context of the actual work to be done. They illustrate this point with an example of a financial services firm where the widely held assumption, or norm, was that the only way to develop successful sales was through aggressive, rapid, cold calls. On this assumption, the company rewarded sales staff based on the number of calls made. An internal review of their diversity initiatives, however, challenged this assumption about effectiveness. It revealed that the first and third most profitable employees were women who used a very different sales technique. Rather than cold calls, they slowly but surely built up long-term relationships with clients. The review concluded that “the company's top management has now made the link between different identity groups and different approaches and has come to see that there is more than one right way to get positive results.”

Working with class differences in organizations is also challenging because acceptance of class inequities is so embedded in organizational concepts and norms of hierarchy, meritocracy and wage labor.⁷¹ Acker (1999), for example, is calling for researchers and practitioners to give renewed attention to class as a critical dimension of organizations. In other cultural contexts where class differences are socially recognized, such as Latin America, it may be important and easier to include class as a significant dimension of organizational diversity as it is already part and parcel of the social structure in which the organization is operating. In spite of the difficulty in addressing these other dimensions of identity, they are critical dimensions of diversity that need to be incorporated more fully into working with social differences in organizations.

7. *Summary*

The social differences lens has been the dominant perspective guiding research and practice focused on diversity in organizations, particularly in the USA. The social lens has been applied in many different ways and, from our perspective, has both advantages and disadvantages.

Advantages of using the social differences lens

- It helps increase understanding and knowledge of one's own and others' identities, group affiliations, and the impact these have on work behaviors and outcomes and the organization of work itself. It helps identify tacit schemas and norms that subtly shape perceptions, expectations and evaluations of the work behaviors and performance of members of different identity groups. This understanding can help reduce prejudice, tensions and miscommunication that inhibit productivity, upward mobility and job satisfaction of non-dominant or historically disadvantaged groups.

- It focuses attention on the benefits that accrue to an organization when the wealth of experiences, knowledge and perspectives that diverse staff members bring to the workplace is recognized as an asset and used, rather than driven underground by pressures to assimilate into the dominant culture.
- It supplements attention to the individual as the locus for change with a focus on group, intergroup and systemic processes and norms in the organization that create opportunities for some identity groups and disadvantage others.
- It more readily accommodates working with differences in status and power relationships among distinct identity groups as defined by their specific socio-cultural and historical contexts.
- It can focus attention on sources of privilege, how these get reproduced in organizations, and on the dynamics of inclusion and exclusion that these privileges, on the one hand, and deprivations, on the other, engender.

Disadvantages, or potential pitfalls, of using the social differences lens

- It can reinforce individual stereotypes and interpersonal tensions if the process is dealt with superficially or is not well facilitated, especially in the context of educational programs.
- It can result in a misguided emphasis on issues of representation and numbers of minority, or non-dominant, group members, rather than on the work practices and organizational culture and how they relate to differences, identity and power relations.
- Often only one dimension of identity is focal at a time and the complexity of a person's identity and affiliation with many different social identity groups is either not acknowledged or is dealt with superficially.
- It may exacerbate inter-group tensions and majority group backlash if not presented appropriately.
- It needs to be carefully monitored and aligned with the organizational vision, culture and strategies so that it clearly addresses effectiveness issues as well as equity issues.

C. CULTURAL DIFFERENCES LENS⁷²

The cultural difference lens focuses on: 1) how culture and cultural differences affect the social relations, work behaviors, expectations and outcomes in organizations; and 2) how differences in values and norms shaped by a society's culture affect the organizational culture and norms of effective management. Research and practice using this lens draw primarily on the fields of international management, comparative organizational behavior and anthropology. Interest in understanding the impact of cultural differences within organizations has intensified in recent years with the dramatic expansion of globalization.⁷³ While the work encompassed by the social differences lens is heavily influenced by research and practice carried out in the United States, European scholars have developed much of the work on cultural differences in organizations.

Drawing on this broad and diverse literature, we focus on two of the most influential streams of work: cross-cultural comparisons and international management. We also highlight several other emerging streams of research and analysis.

1. Culture

A conceptual difficulty underlying this work is the concept of “culture” which has been defined in many different ways. Ting-Toomey (1985: 72) provides a definition that is commonly accepted by anthropologists:

Culture is patterned ways of thinking, acting, feeling, and interpreting. Culture guides our understanding of behavior; it shapes how we approach the world. Culture is comprised of the norms, values, beliefs, and expressive symbols that members of a group use to create meaning [and interpret behavior]. Culture is both enduring and changing.

Researchers and practitioners working in organizations tend to define the concept of culture according to how they want to make it operational.⁷⁴ For example, behaviorists treat culture as observable actions and events; functionalists focus on the underlying structure or rules which explain observable events; and bilingual educators and many anthropologists are interested in the categories of ideas, behaviors or products which are shared by members of a given group. Funakawa (1997) argues that, given the encompassing nature of culture, it influences almost all aspects of management, including organizational factors (such as structure and strategy); management behaviors and styles (such as meeting management and decision-making); and functional (such as marketing or human resources).

While most of the work carried out under this lens focuses on differences in national cultures, it is important for researchers and practitioners to be aware of the different levels at which culture and cultural differences are enacted, for example, at the individual level, the group or relational level, the level of national culture, or any combination of these.

2. National culture and organizational culture

The research suggests that cultural patterns prevailing in an organization's social environment can affect its culture and accepted ways of working and managing in three primary ways.⁷⁵ First, governments and institutions lay down procedures and rules that affect an organization's functioning. These rules usually incorporate the norms and values of the larger national society and affect behavior directly by providing guidelines and expectations for organizational members. Influence of a variety of stakeholder groups, such as the board, funding agencies and beneficiaries, also shapes organizational culture. These stakeholder groups tend to uphold the prevailing cultural values and apply them in evaluating the organization's effectiveness. For an international organization operating in many different national contexts, the issues become very complex and have particular implications for diversity. IBM's global diversity is an example of one way to approach this issue:

IBM has a general policy of 'We don't discriminate against anyone . . . the individual country team implements that general viewpoint in a manner most appropriate to the customs, practices, and laws within that country. . . . We ask our general managers to identify those people who are disadvantaged in their country and to find an appropriate response to them' (Cross and Blackburn White, 1996: 230).

Second, most organizations tend to be designed and developed according to the preferences and cultural values of an organization's founder(s).⁷⁶ For example, an organization founded by a Chinese person (or group) in Kenya would be more oriented towards Chinese cultural patterns than Kenyan ones. The assumption cannot be made that the dominant norms and values of an organization in a particular country will necessarily be those of the host country. As discussed in Chapter IV on change strategies, cultural audits are a useful tool for finding out about an organization's history and the cultural values of its founders, and how it may, or may not, match with the culture of the country in which the organization is located.

Third, organizational culture is also a product of the values of organizational participants, who may be different from and even in opposition to those of the dominant designers. In this respect, parts of the organization may be redesigned to fit more closely with the values of the people who occupy those roles or groups (such as administrative sections staffed primarily by locally hired personnel). The kinds of tensions this produces in an organization may well be a reflection of the class structure of the society as well as of the organization itself.⁷⁷ The fact that a plurality of cultures, subcultures or counter-cultures operates within societies and organizations needs to be acknowledged and worked with. This fact complicates the picture of organizational culture and how it relates to national culture, and it points to issues discussed in the previous section on the social differences lens.

3. Cross cultural comparisons

Much of the work on understanding the implications of culture and cultural differences in organizations is based on the approach of cross-cultural comparisons. Predetermined categories are used to examine selected aspects of the cultures being studied. The objective is not to understand the cultures as their members understand them, but to determine how the cultures compare with respect to some particular quality, such as leadership, management or power.⁷⁸ Hofstede's (1980, 1990, 1991) and Trompenaars' (1993) work are regarded as the key exemplars of this strand of comparative cultural research and its application in organizations.⁷⁹ Hofstede (1980) showed that managers in different cultures apply very different values to their organizational responsibilities and preferences. He compared work-related attitudes across a range of cultures. He investigated the attitudes held in 53 countries or regions, using 116,000 employees of a multinational corporation as informants. Comparisons between the different cultures were plotted across four dimensions that are largely independent of each other: power distance, uncertainty avoidance, individualism and masculinity (see Box 3-6). Funakawa (1997), one of the few non-European writers in the cultural differences field, uses Hofstede's dimensions to give examples of how these differences in cultural values can result in different organizational practices and expectations of management.

Hofstede's research is useful because it suggests which orientation *most* members of a culture group are likely to take when faced with the need to make a choice. Mead (1990) gives an example of applying the model:

The fact that the Hong Kong Chinese have low needs to avoid uncertainty does not mean that they actively court disaster. We would expect that they would welcome lifetime employment, full social security, and an absence of anxiety about working conditions, all other things being equal. But in the real world all other things are not equal, and avoidance

of uncertainty has to be traded off against the possibilities to make entrepreneurial fortunes, which necessarily entail risk. The Hong Kong Chinese are willing to gamble a degree of security in return for these possibilities; [in contrast] the majority of Greeks forgo these opportunities because the level of risk is perceived as unacceptable. Of course, they would also prefer to be rich than poor, but are less willing to take the same risks given the odds against achieving wealth.

Box 3-6 Organizational Implications of Hofstede's Dimensions of Cultural Difference⁸⁰	
Large Power Distance	Small Power Distance
Centralization is popular. Subordinates expect to be told what to do.	Decentralization is popular. Subordinates expect to be consulted.
Strong Uncertainty Avoidance	Weak Uncertainty Avoidance
There is caution about new ideas. Precision and punctuality come naturally.	There is acceptance of new ideas. Precision and punctuality have to be learned.
Collectivism	Individualism
The employer-employee relationship is perceived in moral terms, such as a family link. Management is management of groups.	The employer-employee relationship is a contract based on mutual advantage. Management is management of individuals.
Masculinity	Femininity
People live in order to work. Stress is on equity, competition between colleagues and performance.	People work in order to live. Stress is on equality, solidarity and quality of life.

The example illustrates how Hofstede's analysis leads us to perceive cultures in terms not only of shared values, but also of shared choices between values.

Trompenaars's (1993) work builds on Hofstede's. However, instead of seeking to identify universal categories across which cultures differ, he seeks to characterize national cultures and analyze how specific cultural values affect the process of doing and managing business in a multinational setting.⁸¹ Trompenaars's work is based on academic and field research, cross-cultural training programs, and a database of 15,000 employees in 30 multinational companies. Trompenaars views culture as a shared system of meanings that shapes the way a group of people solves problems. He argues that each culture distinguishes itself from others by the relative positions it takes along seven value dimensions in three critical areas: relationships with people, the passage of time and relation to the environment. He asserts that these differences shape individuals' behaviors and their orientations towards work, leadership and management in organizations. Because these values are so fundamental in shaping worldviews, he has found that they commonly give rise to intercultural conflict and misunderstanding in the workplace. The seven dimensions are:

- *Universalism vs. particularism* - whether rules are seen as universal under all situations or interpreted differently depending upon circumstances and relationships.
- *Collectivism vs. individualism* - whether people regard themselves primarily as part of a group or as individuals.
- *Neutral vs. affective relationships* - whether interactions are expected to be objective and detached, or emotional expression is acceptable.

- *Diffuse vs. specific relationships* - whether a work relationship is considered to influence interactions in other spheres of life, or is specific only to a defined work context.
- *Achievement vs. ascription* - whether individuals are judged on what they have accomplished, or by status attributed to them by birth, kinship, gender, age or education.
- *Sequential vs. synchronic* - the relative weight attached to the past, the present and the future, and the extent to which time is seen as moving in a straight line or circular.
- *Control of vs. adaptation to the environment* - whether individuals see the major focus affecting their lives as residing within themselves, or see the external environment as more powerful.

While similar in their conceptual approach, Hofstede and Trompenaars differ in how their approaches are applied to understanding organizations. For Trompenaars, the connections made between values and behaviors are country-specific. For example, people using this approach might claim that the Dutch believe in group planning because of their historic efforts to protect themselves from the sea. Or, that the Chinese are much more tolerant of accepting rule enforcement because of their history of working and living within a rigidly planned socialist economy.⁸² Hofstede goes a step further than Trompenaars as he links his overarching dimensions to various psychological constructs. Hofstede has developed a universal theory of how value dimensions affect work behaviors. His approach is not country specific, but allows comparisons and the translation of understandings across national contexts. For example, two of his dimensions, power distance and uncertainty avoidance, have implications for the structure of organizations. In cultures where power distance is high, Hofstede suggests that an organizational hierarchy is helpful in maintaining the organization and protecting it from uncertainty. In cultures with high uncertainty, a framework of clearly articulated rules can provide cohesion.

Despite these differences, the cross cultural comparative approach developed by Hofstede and Trompenaars is very useful for managers at the level of the individual. It helps them to avoid ethnocentrism and alerts them to the challenges and sensitivities of working in a different culture. It also helps people to understand that management theory and practices cannot be universalized and that concepts of good leadership and management vary across cultures.⁸³ For example, Laurent (1983) studied cultural differences in expectations about managers based on survey data from more than 1700 managers in ten countries. He reported significant differences in the extent to which workers expect precise answers to questions that subordinates may have about their work. He found that only 13 percent of the workers in the United States expected precise answers, compared to 59 percent in France, 67 percent in Indonesia, and 77 percent in Japan. A practical example of the application of this approach to enhancing effectiveness of multicultural meetings is presented in Box 3-7.

At the organizational level, their work also argues strongly that management values are *not* the same across the world and that there is no one best way to manage and organize. They argue that organizations working transnationally need to recognize that different cultures have developed different—but often equally effective—solutions to universal problems. To be successful with an international work force, organizational structures and systems for managing, evaluating and communicating need to reflect the cultural diversity. One of the main dilemmas for organizations working across cultures is the extent to which they should centralize, thereby

imposing rules and procedures on foreign cultures that might affront them, or decentralize, thereby letting each culture go its own way without having any centrally viable ideas about improvement since the “better way” is a local, not a global, pathway. The cultural comparative approach suggests that it may be an expensive mistake to suppose that a single policy can dictate the details of organizational culture across a range of regional offices. Local cultural values will always influence how headquarters’ policy is interpreted at the local level. A policy appropriate to one culture may be quite inappropriate if applied to another. Trompenaars (1993) concludes that international and transnational structures have the potential to synthesize the advantages of all cultures while avoiding their excesses. What occurs, then, is a multi-cultural negotiation of strategic goals and operating procedures.

**Box 3-7
Cultural Meeting Styles⁸⁴**

This tool is designed to strengthen the effectiveness of meetings including people from diverse cultural backgrounds. Members of the group first assess individually how they would rate themselves along nine dimensions (roles, sequence of participation, etc.) in terms of their preferred style of meeting. They then rate their experience of the meeting style of the group and explore their comfort and discomfort with that style. Based on this data, the group then discusses how the meeting style of the group could be made more multicultural.

Roles

- Leader/Audience
- Leader/Participant
- Facilitator/Participant
- Participant only

Sequence of Participation

- Ordered
- Monitored
- Open

Topic Control

- Fixed
- Flexible
- Open

Decision-Making Process

- Vote
- Vocal Assessment
- Consensus

Pace

- Efficient
- Tolerant
- Patient

Space Organization

- Rows
- Formal Circle
- Layered Circle
- Loose Unstructured

Time

- Fixed
- Flexible
- Loose

Language Choice

- Prestige
- Common
- Multi-lingual

Socializing

- Minimal
- Moderate
- Extensive

While recognizing the value of the approach developed by Hofstede and Trompenaars in organizations, we have two concerns in applying this approach. The first is the causal link between culture and behavior is not always evident.⁸⁵ There is no clear explanation in their work as to how value dimensions assessed from written questionnaires actually influence behavior in different work contexts. Canney Davison and Ward (1999) explain:

Suppose someone is assessed as highly individualistic on a pre-questionnaire, finds it individually worthwhile to be very group oriented when working with a particular team, but again measures highly individualistic on a post questionnaire. People who believe all cultures are converging into one homogenous business culture may take it as evidence to support their argument. Others may regard the behavior as a temporary adaptation and not related to the real underlying cultural values of the participants. Still others may take it as a sign of bi-culturalism or that the individual is highly adaptable across cultures.

The second concern is that the approach of Hofstede and Trompenaars is most valuable to people who are immersed in a local foreign culture (operational workers and local managers), as they have demonstrated that important differences exist in expectations of leaders, in the means and outcomes of performance evaluation, and in the expectations that workers have of their involvement in the work process and its organization. But, we believe that this work is less useful for managers working in a multicultural context. The fact that the problems and solutions apply to one cultural context tells us little about how they may be applied generally or across a diversity of cultural contexts. Managers, when faced with many cultural contrasts as in a multicultural organization, need consistent tools and skills for the management of human resources, particularly for those working at the global level.

4. International management

The principal body of work that seeks to address this challenge is the international management literature. For the most part, this research has aimed at uncovering the psychological traits or managerial skills needed to operate in cross-cultural settings. Whereas the literature of cultural difference generally contrasts behavior in two or three countries, the international management literature searches for tools that are effective across all national/cultural boundaries.

Interestingly, in the international management literature, cultural differences are minimized. Culture is not seen as a defining factor in shaping work practices and their effectiveness and efficiency in specific contexts. Instead, in this approach, comparisons are made between diverse types of organizations along a number of structural dimensions. Structural similarities and the relationships among structural variables are the key issues for investigation. A key assumption is that the basic tasks for any organization are essentially the same worldwide. Therefore, given similar circumstances, the structure of the organization—the basic patterns of control, coordination and communication—and its core business practices can be expected to be very much the same wherever it is located.⁸⁶ This view, of course, contradicts the principles and findings of Hofstede and Trompenaars.

This international management approach gives a great deal of attention to issues of leadership and human resource management. Leaders of international organizations must appeal to a wide range of employees and other stakeholders. If personnel policies are tailored to specific countries, then they may be ineffective and inefficient for the larger global organization. To

reduce fragmentation, this approach suggests that international policies and systems need to over-ride local ones. On the other hand, the greater integration and the more dynamic international environment mean that structures cannot remain static and need constant revision. Another disadvantage of this approach is that individual cross-cultural interactions have become more frequent and less constrained by bureaucratic guidelines, which makes the application of common systems more problematic.

From our perspective, the application of the international management approach is problematic. The international manager is asked to be aware of problems of cultural differences and to minimize them, but there are few theoretical or applied treatments that would help guide a manager in making appropriate decisions and interventions. Moreover, we believe that research and experience do show that culture has a significant impact on the understanding of management and behavior within organizations and the international management approach tends not to pay sufficient attention to culture as a variable.

5. Working with cultural differences

Nancy Adler (1986) points out that the extent to which managers recognize cultural differences and their potential advantages and disadvantages affects the organization's approach to managing those differences. She classifies organizations as:

- *parochial* – cultural differences and their impact on the organization are ignored (our way is the only way);
- *ethnocentric* – cultural differences are noticed, but the ways of others are seen as inferior and are viewed as only causing problems (our way is the best way); and
- *synergistic* – members believe that a combination of various approaches is the best (our way and their way differ, and we can learn from each other).

She argues that only when members of an organization recognize cultural differences, as well as their potential positive impact, is it likely that the organization will attempt to manage that diversity. It is the *approach* taken to working with differences, not the existence of cultural differences, that determines actual positive and negative outcomes. For example, research has been done on which mechanisms of control are preferred by different nationalities as their organizations spread internationally.⁸⁷ U.S. Americans tend to favor financial and bureaucratic control, Italians favor social and financial control, and the Japanese prefer social control. A synergistic organization would question what types of control it is using, find out the effect they are having on different cultural groups, and seek ways to use a combination of approaches that suits organization members best.

6. Other streams of cultural differences research

The field of cultural difference research is complex and evolving. It is conducted in many discipline areas and there is no theoretical underpinning for the field as a whole. Some pieces of research and practice are proving helpful and are briefly mentioned below.

a. Globalization

As globalization calls into question the nation-state, it also focuses attention on culture.⁸⁸ Operating across borders brings about changes in organizational practice. Organizations construct, and are constructed, as members are exposed to different cultures and adopt some measures of norms, habits and values from them. Changes such as these then presage national changes, as organizations become conduits for a “global” culture as well as recipients of multiple national cultures. This suggests that with globalization, as behaviors, norms and beliefs emerge from outside national boundaries, the nation-state is not necessarily the main source of culturally acceptable behaviors or beliefs.

b. Organizational discourse

Organizational theorists have begun to examine how discourse expresses the individual and collective reality of the speakers and how that affects organizational behavior in such areas as the management of identity,⁸⁹ the exercise of control,⁹⁰ and the conduct of performance evaluation.⁹¹ Analysis of the discourse used by organizational members can help identify the cultural influences on their underlying cognitive structures. This approach can be used to compare behaviors in separate cultures, but it is probably more useful in investigating situations where two or more cultures must interact to create, at least temporarily, shared understanding.

c. Language and culture

English has become the predominant language of cross-cultural communication. Now there are more people in the world who speak English as an acquired rather than as a native language. People working internationally, who do not share a common language, are likely to use English to talk to each other. The danger is to assume that English is a standard language across these contexts, whereas numerous varieties of English are now spoken. Research by Canney Davison and Ward (1999) illustrates the powerful role that language status and competence has in determining who leads and talks in international teams.⁹²

7. Summary

The cultural differences lens has distinct advantages and disadvantages for its application in organizations.

Advantages of using the cultural differences lens

- Training courses based on insights from this lens can help organization members to increase respect and communication among members of different cultural groups as cultural stereotypes and misunderstandings diminish. It may also help make cross-cultural negotiations go more smoothly.
- It helps individuals confront how implicit ethnocentrism shapes their understanding of other cultures and the values and behaviors exhibited by others from different cultures.
- It draws attention to how assumptions of good management and leadership are embedded in culture and how these may vary across contexts. The literature amply demonstrates that important differences exist in expectations of leaders, in the means and outcomes of

performance evaluations and in the expectations that workers have of their involvement in the work process and its organization.

- It is easily understood and attractive, because it fits the dominant paradigm of classifications and generalizations about cultures.
- It draws attention to the prominent differences that impact most organizations with a plurality of national cultures, such as international NGOs, intergovernmental organizations or international civil service organizations.

Disadvantages, or potential pitfalls, of using the cultural differences lens

- The conceptualizations of culture tend to be unduly static and inflexible, reduced to simple polarities of researched dimensions.
- National culture is stressed at the expense of recognizing cultural diversity within national settings and at the expense of recognizing other social dimensions of identity and group interactions, such as race, gender or class, which also shape culture.
- This perspective may lead organizations to focus on the representation of diverse nationalities, rather than on the impact of diverse cultural perspectives on work.
- The influence and relationship of power to cultural assessments and judgments is often understated. These value judgments impact performance through the transmission of differential expectations.
- It is vulnerable to being translated into interventions of appreciating cultural differences that are not closely connected to the organization's work. While including different national dishes in the organization's cafeteria and having fairs that celebrate national differences can help to create a more multicultural organizational climate, these interventions are not likely to have a significant impact on work practices and structures.

D. COGNITIVE-FUNCTIONAL LENS

The cognitive-functional lens focuses on diversity in task-related knowledge, skills, abilities and experience, including the styles by which individuals access and use information and knowledge. Task-related knowledge and skills are shaped primarily by educational background, disciplinary training, organizational tenure, or organizational function, specialization and level. Individuals' access to different professional networks and different physical resources (e.g. clerical support, funding, technologies) also represents a functional type of workforce diversity.⁹³

The work carried out using this lens derives from research on cognitive and cultural differences among organizational functions and disciplines and from psychological research on individual cognitive styles and preferences. Because of its focus on task-related diversity, work using this lens emphasizes the link to organizational and work group performance. For example, in discussing this approach to diversity, Sessa and Jackson (1995: 134) observe that "diversity within a decision-making team is recognized as important primarily because it is associated with the resources available during the decision-making process—especially task-related cognitive resources." Less attention is given to the impact of diversity on individuals' career outcomes as more typically occurs with the social differences and cultural differences lenses.⁹⁴ Much of the

research and practice using this lens has focused on knowledge workers,⁹⁵ including researchers, scientists and engineers, and on cross-functional and senior management teams.⁹⁶

1. *Linking diversity with organizational functions and areas of specialization*

The cognitive-functional lens concentrates on organizational groups and the differences that are salient in the context of organizational functions and tasks. Organizational groups are “groups that have a task in common, participate in similar work experiences and, as a result, develop common organizational views.”⁹⁷ The assumption is that the information individuals have available and the cognitive maps and models that they employ are shaped by the organizational unit where they are employed, their area of specialization or discipline, the organizational level at which they work, and the length of their tenure with the organization.⁹⁸ Researchers and practitioners using this lens see work specialization as an important dimension of diversity, because the functional or disciplinary areas of organizations tend to have their own distinctive cultures as well as distinctive areas of knowledge and expertise.⁹⁹ Alderfer (1987) argues that members sharing common organizational positions (e.g., managers, scientists or shop floor workers) participate in equivalent work experiences and, therefore, have consonant worldviews.¹⁰⁰ This shapes how they identify and frame problems and the types of solutions they seek. Moreover, disciplinary and occupational specialization has been shown to be related to personality characteristics suggesting that functional diversity may also reflect individual differences in work styles and preferences.¹⁰¹ Diversity in both organizational function and tenure has been shown to have an impact on work group and team performance (see Box 3-8).¹⁰² Pelled (1996), summarizing research on functional diversity, argues that functional (or disciplinary) diversity can generate substantive conflict that enhances cognitive task performance (e.g. decision-making, problem-solving, or creative idea generation). However, these benefits can only be realized if the team process is managed in a way that keeps conflict focused on substance and not on interpersonal relations.

2. *Cognitive styles*

Whereas functional (or disciplinary) diversity works with differences in the content and skill aspects of task-related differences (e.g. disciplinary or functional differences about *what* is known), cognitive diversity focuses attention on differences in *ways* of knowing and learning in relation to specific tasks. Cognitive diversity includes the range of styles people employ to access information and knowledge, analyze it and apply it. Cognitive diversity reflects different ways of perceiving, reasoning and problem solving.¹⁰³ This dimension of diversity recognizes that individuals approach situations and problems differently. The Myers-Briggs Type Indicators is a good example of a tool used to understand diversity in cognitive styles and preferences.¹⁰⁴ The Myers-Briggs typology of style preferences focuses on differences in the ways people interact with others, how they gather information and process data, how they make decisions and form conclusions, and how they perceive the world and orient themselves within it. The typology of preferences helps people understand differences in others’ styles and behaviors in organizations in a more objective and appreciative way. Recognizing differences in cognitive and interactive styles in an explicit way allows individuals to focus on the complementary aspects and values of different styles and, thus, function more effectively in teams, in meetings or in interpersonal interactions and communications.

Box 3-8**The Impact of Functional Diversity in Research and Development on Team Performance**

Ancona and Caldwell's (1992) rigorous study of diversity in product development teams in a large research and development (R&D) company is a good example of research carried out with the cognitive-functional lens. They found that functional diversity was a significant factor affecting specific aspects of performance of product development teams. The greater the functional diversity, the more team members communicated outside of the team boundaries (with marketing, manufacturing and top management). The more the external communications, the higher the managers ranked the team on innovation. However, functional diversity was negatively correlated with overall team performance. The authors concluded that functional diversity may spark more creativity in problem-solving and product development by bringing together different cognitive resources. However, it also impedes implementation, because there is less capability for teamwork than in homogenous teams (see Chapter II). They argue that diverse teams must be managed to harness the benefits of cognitive diversity while minimizing the negative effects.

3. *Neutrality of differences*

Because of its focus on task-related diversity, differences highlighted under the cognitive-functional lens tend to be seen as neutral and objective rather than value laden, as in the cultural differences lens, or as markers of variance in status and power, as in the social differences lens. From the perspective of the cognitive-functional lens, it is difference itself that is important and it is assumed that different types of diversity have similar consequences.¹⁰⁵ Sessa and Jackson (1995) have characterized this approach as having a "horizontal perspective" in that it is politically neutral and views differences as symmetrical. This stance can create a more neutral environment for working on diversity. In this way, concentrating on diversity in specialization, discipline or cognitive style can, in some contexts, serve as a useful entry point for reflection and developing understanding about working with differences.

From our perspective, however, this approach places diversity within an overly rational framework. It amplifies the potential benefits that can accrue from bringing diverse cognitive resources to bear in decision-making and problem-solving, but occludes the potential process losses in communication, team functioning and decision-making that can result from status and power differences among members in diverse work groups (see Chapter II, Section B). It is interesting to note that several studies comparing the impact of different dimensions of diversity have suggested that the effects of social identity and cultural differences are stronger than those of occupational level and specialization.¹⁰⁶ Similarly, in a study of R&D professionals, cultural differences had a significant influence on the extent to which shared occupational values were experienced (see Box 3-9). Moreover, recent research on diversity by organizational level (which reflects the internal class structure of organizations) has shown that this dimension of diversity has impacts on individual outcomes that are similar to those of groups that are marginalized within organizations on the basis of status differences marked by race or gender (see Box 3-10).

Box 3-9

Intersection of Occupational Culture and National Culture Among R&D Professionals

Researchers and practitioners representing the cognitive functional lens assert that professional, managerial or other occupational specializations develop distinct cultures. These may vie with cultures based on the organization or the national context in influencing behavior. One assumption, for example, is that R&D professionals worldwide prefer work that affords them high levels of challenge, autonomy and a good working relationship with their manager. They typically appreciate a more consultative manager, are less concerned with employment security, and are willing to express disagreement with their superiors or question the organizational rules. In short, R&D professionals, independent of their nationality, share a set of values that seems to call for the same management approach worldwide.

However, in an evaluation of Hofstede's model, Hoppe (1993) has shown this to be a misleading conclusion. R&D professionals, despite their similarities, carry with them norms of their country, as reflected in the country differences that exist for Hofstede's four value dimensions: power distance, uncertainty avoidance, individualism and masculinity (see Box 3-6). That is, they are similar in what they value at the workplace, but the degree to which they value it varies from country to country. Even more importantly, while R&D professionals worldwide tend to hold similar values, the meaning of these values as well as their behavioral expression may differ markedly across countries (Smith & Paterson, 1988). For example, the perception of challenging work in a country high in individualism may carry the meaning of individual achievement, responsibility and control over outcomes. Whereas in countries high in collectivism, it may mean contributing to the well being of the in-group, showing loyalty or achieving high status.

Box 3-10

Organizational Dimensions of Diversity-Specialization and Level

Research by Cox and Finley (1995) on managers and professionals in a R&D firm in the United States examined how perceived differences in the statuses of diverse occupational groups affects members' affective outcomes (job satisfaction, job involvement and commitment) and achievement outcomes (performance, compensation and mobility). They hypothesized that work specialization and occupational level would function as relevant dimensions of diversity; that they would differentiate workers' experiences and perceptions. Furthermore, they expected that members in lower organizational levels and in non-dominant work specializations, representing groups that have less power and tend to be undervalued in the organization, would have less favorable career outcomes. They expected that members of these lower status groups would have experiences similar to those observed for members of minority social identity groups.

They found that members belonging to the dominant specialization, engineering, had significantly higher scores in employee satisfaction and job performance ratings than members belonging to non-dominant specializations. In terms of organizational level, executives had significantly higher scores on organizational identification, employment satisfaction and compensation satisfaction. Overall, they found moderate support for the hypothesis that work specialization and organizational level has an influence on both affective outcomes and achievement outcomes. Cox and Finley conclude, "To some extent, workers in less dominant work functions and those at lower organizational levels may experience similar 'alienation' effects as have been observed for members of gender and race minority groups. These effects at the individual level may, in turn, lead to consequences for group and organizational performance."

4. Summary

In summary, the review of research and experiences suggests four primary *advantages* of the cognitive-functional lens and three *disadvantages*.

Advantages of the cognitive-functional lens

- Differences are perceived as politically neutral and symmetrical, thus reducing sensitivities in identifying and appreciating differences.
- Differences in knowledge, disciplinary or functional expertise, or educational background are more readily grasped and seen as relevant to work tasks than differences in perspective deriving from social identity group affiliation.
- The work-related motivation for working with diversity is clearer, since a larger body of research has been carried out that demonstrates the link between cognitive and functional differences and organizational performance (see Chapter II).
- It deepens understanding of sub-cultures within organizations and the differences in experiences and perspectives employees may have depending on where they sit in the organization.

Disadvantages of the cognitive-functional lens

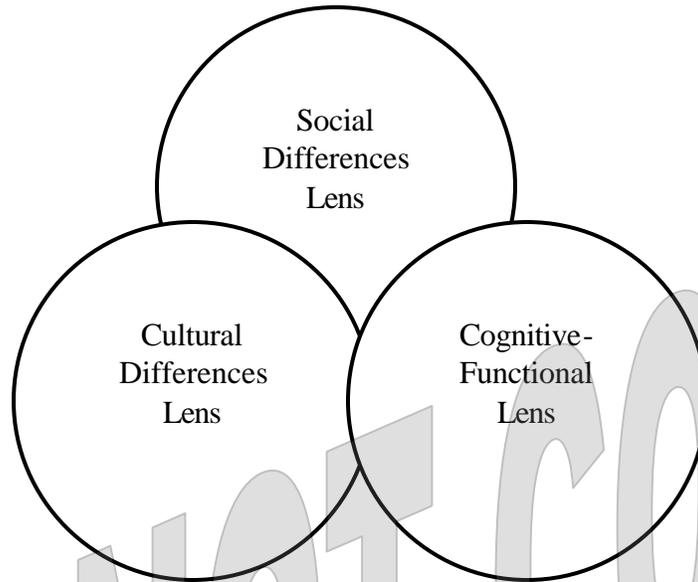
- It does not readily accommodate the analysis of the different statuses or valuing that may be accorded to different behaviors, cognitive styles, areas of expertise or knowledge systems within organizations.
- It does not readily recognize the different valuing of behaviors, knowledge or skills that may occur when contributed by members of different social identity groups.
- The lens focuses on individual attributes and how “mixes of diverse cognitive resources” relate to organizational performance primarily at the team level. The lens is less effective for looking at inter-group and systemic levels of analysis.

E. APPLYING THE LENSES

The three lenses focus attention on different dimensions of diversity and different kinds of organizational issues. Each draws on distinct bodies of theory, research and practice. Each has different strengths and weaknesses. Each will influence the kind of strategy an organization develops to work with diversity (see Chapter IV). We believe that organizations need to be cognizant of these distinct approaches to working with diversity and select an approach that best fits the strategic reasons driving their work on diversity (see Chapter II) and their specific organizational context. In many cases, organizations will want to draw on all three lenses to understand how diversity is affecting work relations, behaviors and outcomes. In reflecting on the application of these diversity lenses to analyze and stimulate changes within organizations, we want to close with the following points:

1. *Intersecting lenses*

It is important to underscore that the three lenses on diversity can intersect and inform one another. Issues of race and gender, for example, manifest themselves differently across different organizational levels and specializations as well as across different cultural contexts. Similarly, the ability to forge effective working relationships across disciplines is influenced by the extent of diversity in other dimensions such as ethnicity, gender and race.



Embedded intergroup relations theory is useful for working with this intersection.¹⁰⁷ The theory provides a framework for understanding group relations in organizations—conceptualizing race, gender or class relations, for example, as a special class of group relations. The theory differentiates between identity groups and organizational groups and focuses attention on the relations between the two. People in organizations are simultaneously members of identity groups and organizational groups and thus, “are continually attempting, consciously and unconsciously, to manage potential conflicts arising from the interface between identity and organization group memberships” (Thomas and Proudford, 2000: 53). Intergroup theory also suggests that organizational conflicts between groups can be understood better by paying attention to the extent to which power differences between groups at the societal level are mirrored, or not, in the relations between these groups in the organizational system. While the complexity of intergroup theory requires more discussion than is possible within the limits of this paper, we believe that an intergroup perspective is very valuable in understanding conflicts among groups or between members of different identity groups, especially those which seem apparently unexplainable or intractable.¹⁰⁸

2. *Power*

We believe that it is essential to think explicitly about power within the context of diversity. Approaches to working with diversity vary widely in the extent to which they recognize power differentials within their analyses and change strategies. As noted above, the social differences lens is the most explicit in embracing power issues. Work using this approach builds from the

assumption that some social identities are privileged in relation to others. In contrast, the cognitive-functional lens tends to ignore power differences. Work carried out under this lens tends to view all differences as equal and symmetrical in their impacts on work. Similarly, work using the cultural differences lens pays limited attention to power, but as Canney Davison and Ward (1999: 65) argue:

Cultural differences rarely play out on an equal playing field and this applies to differences in organizational, functional and ethnic cultures as much as to differences in nationality. Differences in power, wealth, economic and education levels, for instance, often underscore cultural differences. Differences such as age, job status, gender, length of tenure, motivation, reward, knowledge and skills create inequalities in all teams, including international teams. They need to be managed well to prevent them from being dysfunctional.

The extent to which an organization is willing to recognize power relations and address these within a diversity initiative will have an important impact on the type of diversity change strategy it adopts. From our perspective, the kind of deep cultural change we believe is required to work effectively with diversity can only occur if power relations are addressed.

3. Integrating the lenses

In the previous two chapters, we reviewed the motive forces for working with diversity (i.e., the *why*) and three major approaches, or lenses, that have been used to define diversity and its relevance for organizations (i.e., the *what*). In the following chapter, we focus on *how* to develop a diversity initiative. We review two major types of change strategies that organizations can adopt to develop their capacity to work effectively with diversity. Throughout we seek to distill lessons learned from research and experience from other organizations.

Abramms and Simons (1996) offer a comprehensive model that integrates the key contributions of the different lenses to organizational diversity efforts and suggest four dimensions of change that a diversity initiative must address given the complexity of issues raised in this chapter.

- *Achieve organizational justice* – to ensure fairness and equity for all organizational stakeholders.
- *Reduce bias* – to help individuals and groups in the organization recognize and address the prejudices that impact their behavior, attitudes and organizational outcomes at work.
- *Develop cultural competence* – to support individuals to learn to work with differences and others who are different from them by learning about their own culture and that of others and how to effectively interact across such differences in the work environment.
- *Act on the added value that diversity brings* – to learn to incorporate and use the value that different perspectives and beliefs bring to all the different dimensions of work and organizations.

An example of how organizations can translate what is learned from the different lenses and models presented throughout this chapter and develop a practical statement to guide a diversity initiative follows:

Diversity means that each person brings individual characteristics of race, gender, nationality, religion, age, physical ability, sexual orientation, and ethnicity to the workplace. In order to leverage, that is, effectively use diversity, the organization does not merely recognize, manage, or accept the individual differences of each person. The organization encourages and values diversity (a multinational corporate statement, private communication with one of the authors).

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IV. DIVERSITY CHANGE STRATEGIES

A. OVERVIEW

Authors and practitioners vary widely in their specific recommendations and approaches to diversity initiatives because as Zane (1994) points out, they come from very different disciplinary backgrounds such as organizational behavior, organizational development and sociological and feminist disciplines. Considerable differences exist in several areas including:

- vision of a successful and diverse organization;
- degree and type of change required to accomplish diversity;
- levels of the system to focus change effort (individual, group, organizational, societal);
- measures of change and success used; and
- kind of change required, whether long or short term, radical or evolutionary.

As argued in Chapter II, comprehensive diversity programs are implemented as part of a strategic, integrated and intentional organizational change effort, whereas other diversity programs are isolated and piecemeal. However, in spite of the many differences and the plethora of strategies and activities recommended to achieve and successfully work with diversity, we summarize here some of the common elements among them. We also offer some cautionary suggestions and identify the key choices an organization faces when initiating a diversity effort. It is important to underscore that we understand diversity to be more than a human resource strategy or an approach for managing the workforce. Instead, diversity refers to a perspective that permeates the work and work processes of the organization and requires a comprehensive change effort. This is what we have called *working with diversity* (see Chapter I).

The key components of a diversity initiative are:

- defining a vision of the desired outcome, that is, a successfully diverse organization;
- understanding the dynamics of change and establishing an appropriate strategy for change, which is tailored to the organization; and
- selecting and combining the most effective interventions and best practices in order to achieve the goals for diversity change.

From our review of the literature, we suggest that there are two major change approaches under which most diversity initiatives fall: 1) long-term, planned, systemic organizational development approaches; and 2) action research, collaborative inquiry approaches. Both of these approaches, or a creative combination of them, can deliver on the 13 conditions of success discussed below.

B. CONDITIONS FOR SUCCESS

We identify below 13 conditions for success for diversity initiatives. These are common elements gathered from the literature and our own experience which we believe make an initiative more likely to succeed and less likely to fail.¹⁰⁹

- *Work from an inclusive definition of diversity*, which, for example, goes beyond race and gender issues to include other dimensions of difference (see Chapter III).
- *Develop a strategic vision and plan* with clear objectives, focus and appropriate financial and human resources to support it. Communicate the plan widely.
- *Align the initiative to the core work of the organization and its strategic goals* and connect it to a clear statement of needs that conveys the urgency and benefits the organization will derive from embracing change (see Chapter II).
- *Engage many forces and people* to create a broad sense of ownership, for example, by supporting the development of a cadre of internal change agents and building alliances and coalitions among diverse internal constituencies and networks to support change. Engage respected and credible people to help guide and champion the change.
- *Have clear leadership* and involvement of senior management in the change process beyond verbal and symbolic support. Identify internal champions with defined responsibilities for implementing the initiative.
- *Pay attention to internal and external factors* that may support or hinder the initiative, such as budget constraints, changes in the internal and external political climate, and potential alliances with external pressure groups, such as clients, donors or partners.
- *Build the change strategy from a solid analysis* of diversity issues in the organization. Develop the analysis from multiple perspectives throughout the organization.
- *Provide freedom to pilot and experiment*. Encourage an environment of learning from experience where flawless implementation is not expected.
- *Convey the importance of engaging in a dynamic and systemic process*, not a static program or a single “quick-fix” solution.
- *Encourage an open climate* that allows for the expression of passion, compassion and forgiveness throughout the change and learning process.
- *Assign accountability* across all levels and types of employees, including senior management.
- *Ensure the competence of consultants* and other resources in designing and facilitating relevant initiatives aligned to the organizational culture and strategic imperatives.
- *Recognize, celebrate and connect “small wins”* in order to aggregate small changes into a larger change process with more impact.¹¹⁰

C. ORGANIZATIONAL DEVELOPMENT APPROACH

The organizational development (OD) approach to diversity is an integrated, planned, system-wide and long-term process of change that addresses a complexity of organizational dimensions and levels. Multicultural organizational development (MCOD) is a process of change that supports an organization moving from a monocultural, or exclusive, organization to a multicultural, or inclusive, organization. MCOD is an example of an organizational development approach to diversity.¹¹¹ Organizational development approaches are characteristically managed from the top, cascade down the organization to other organizational

levels, and make use of external consultants as experts who support the organization throughout the process of change.

1. *Multicultural organizational development model*

The organizational development approach requires an initial assessment of where the organization is, in relation to diversity, and its vision of where it wants to be in the future. From an analysis of the gap between where the organization is and where it wants to be, specific interventions are then designed to accomplish the identified change goals. Holvino’s MCO model provides a useful way for an organization to frame an initial diagnosis and vision of diversity (see Box 4-1).¹¹²

Box 4-1
The Multicultural Organizational Development Model¹¹³

MONOCULTURAL		TRANSITIONAL		MULTICULTURAL	
Exclusionary	Passive Club	Compliance	Positive Action	Redefining	Multicultural
Actively excludes in its mission and practices those who are not members of the dominant group.	Actively or passively excludes those who are not members of the dominant group. Includes other members only if they “fit.”	Passively committed to including others without making major changes. Includes only a few members of other groups.	Committed to making a special effort to include others, especially those in designated target groups. Tolerates the differences that those others bring.	Actively works to expand its definition of inclusion and diversity. Tries to examine and change practices that may act as barriers to members of non- dominant groups.	Inclusive and diverse. Actively includes a diversity of groups, styles and perspectives. Continuously learns and acts to make the systemic changes required to value and include all kinds of people.
Values the dominant perspective of one group, culture or style.		Seeks to integrate others into systems created under dominant norms.		Values and integrates the perspectives of diverse identities, cultures, styles and groups into the organization’s work and systems.	

Holvino’s model suggests that organizations go through six phases when moving from *monocultural*, an exclusionary organization where the values of one group, culture or style are dominant, to *multicultural*, an inclusive organization where the values of diverse peoples are valued and contribute to organizational goals and excellence. In the first stage, *exclusionary*, organizations base their business and processes on one cultural group’s norms and values and advocate openly for the privileges and dominance of that group. Today, not many public organizations are exclusive in this way. In the *passive club* stage, organizations are based on one cultural group’s informal rules, systems and ways of doing things and only admit those who are

similar or closely fit the dominant group. In this stage, organizations operate as private social clubs where the norms include passive exclusion and ignoring of differences.

Organizations in the third stage of *compliance* are passively committed to including members of non-dominant groups, but do not make any changes in the ways of managing the organization so as to include those who are different. At this stage, differences are more symbolic than real, such as in a predominantly Christian organization with one or two Muslims where the cultural symbols and celebrations remain Christian. In the *positive action* stage, organizations are actively committed to including members of non-dominant groups, making special efforts to attract them and be tolerant of the differences they bring. But subtle ways in which the norms, structures and ways of doing work still favor those in the dominant group make it hard for others to feel that they can contribute and advance in the organization. At this stage, a critical mass of non-dominant group members exists. They begin to question and change some ways of doing things. Though there is tolerance and targeted use of differences, not enough culture and structural change has occurred to include and offer equal opportunities to all people.

In the *redefining* stage, organizations actively try to include all differences and to change the subtle and not so subtle barriers to inclusion in norms, practices, relationships, structure and systems. At this stage there may be acceptance of differences, but not full “utilization,” as members of both dominant and non-dominant groups are still learning to deal with differences and diversity. In the *multicultural*, or inclusive and diverse stage, the ideal stage in the multicultural organizational development process, organizations seek and value all differences and develop the systems and work practices that support members of every group to succeed and contribute fully to the organization.

2. *Visions to guide the diversity change process*

The vision of a diverse and fully multicultural organization embedded in Holvino’s MCOD model is similar to other visions provided in the literature. For example, Foster et al. (1988: 40) define a multicultural organization as:

[one] that 1) reflects the contributions and interests of the diverse cultural and social groups in the organization’s mission, operations, products, or services; 2) commits to eradicate all forms of social discrimination in the organization; 3) shares power and influence so that no one group is put at an exploitative advantage; 4) follows through on its broader social responsibility to fight social discrimination and advocate social diversity.

Cox (1991) defines a multicultural organization as one characterized by pluralism, full structural and informal integration, absence of prejudice and discrimination, low levels of intergroup conflict, and similar levels of identifications with the organization from both majority and minority employees.

In essence, we define a multicultural organization as one in which: 1) the diversity of knowledge and perspectives that different groups bring to the organization has shaped its strategy, its work, its management and operating systems, and its core values and norms for success; and 2) members of all groups are treated fairly, feel included, have equal opportunities and are represented at all organizational levels and functions.

3. *Sequence of change: A helpful process*

While many organizations come up with their own blueprints for developing and implementing a diversity initiative, the following five-step process is representative of common practices in the organizational development approach.¹¹⁴ The steps are:

- preparing for an initiative;
- assessing needs related to diversity;
- developing a vision, goals and a strategic plan;
- implementing the interventions selected; and
- monitoring and evaluating progress and results.

Each of these steps is briefly described below. It is important to note, however, that while the steps appear to be linear, in reality this is a cyclical process in which the last step informs prior work. Because diversity is so complex, it is recommended that especially in its initial stages, the plan remains open and flexible, until data gathering, learning and needs assessment have taken place to better inform the initial decisions made. For example, the concept of diversity is usually unclear in the beginning and much of the learning that takes place during data collection is about the barriers to, the meaning of, and the vision of inclusion and diversity that will galvanize members to work towards and embrace the change effort.

a. Preparing for an initiative

This step involves securing leadership support and involvement; developing an initial plan of action—who will be in charge, what is the initial charge or objective, when will the effort start, what is the target for completion of the initial stages, how will an initial plan of action be developed, how much time and resources are available, and what are the motivators for change, i.e., the strategic organizational imperatives.

Hayles and Russell (1997) call this step “preparation”; Loden (1996) calls it “laying the groundwork.” Communicating the intent of the initiative, allocating resources, assigning responsibilities and framing the initial task are the most important elements of laying the groundwork for a diversity effort. Ensuring that the initiative responds to the organizational imperatives for diversity is a major element of this first step in the process (see Chapter II).

b. Assessing needs through data collection

Once the intent of a diversity initiative has been identified, data needs to be gathered about the state of the organization in important areas of diversity. Cultural audits, employee surveys and focus groups are typical interventions or activities that help an organization gather information about which aspects of diversity should be explored given the strategic imperative.¹¹⁵ The information collected is fed back to selected members of the organization. They, in collaboration with a consultant, analyze and make recommendations. The purpose of the data analysis and feedback process is to connect interrelated themes into a meaningful picture that suggests

important areas of need and change goals. Strengths as well as limitations should be identified and categorized under some broad areas of change.

The MCODE model (see Box 4-1) helps define the diversity change goal by providing a framework to interpret the data collected into a picture of the current level of multicultural development. Usually the change goal becomes the means to move the organization to the next stage of development. In doing an assessment, one needs to look at all of the important dimensions of an organization and all the social groups that may need to be included in order to determine the level of current multiculturalism. For example, how do the mission, culture, language, informal systems, policies, structures, leadership and reward systems support, or not support, an inclusive and diverse organization for women, for racial, ethnic, language or religious minorities, for gays and lesbians, for disabled persons and for other social groups? While it is not possible to address all these issues or all identity groups in the beginning stages of an initiative, it is important to understand that being able to respond to new demands and expand the agenda for change will increase support for the overall change effort. As a critical mass of internal and external change increases, gradually incorporating the needs and perspectives of new stakeholders also helps to reduce resistance of those who feel that they may not benefit from the change effort.

c. Developing a strategic plan

An organizational change strategy is a comprehensive plan based on a thorough analysis of organizational needs and goals. It is designed to bring about specific changes and to ensure that appropriate steps are taken to maintain those changes. Included in it are definitions of end objectives, outlines of specific actions designed to produce the desired outcomes, time frames, and an evaluation or monitoring system. A strategy must specify the priority goals, primary interventions, a sequence of activities and resources and responsibilities. It also needs to take into consideration the power dynamics and the culture of the organization. When deciding what to do first and how to proceed, Loden (1996) suggests that the strategic plan also take into account knowledge gathered from the behavioral sciences about how innovations are adopted in organizations (see Box 4-2).

A well developed strategic plan guides a diversity initiative by: a) informing the organization about the importance and flow of the change effort; b) defining goals for management and targets of change; c) providing a structure, clarity and accountability for the initiative; and d) linking the effort to the competitive advantage and gains that will be derived from the initiative. Arredondo (1996: 96) states that the strategic plan is “the document that can reflect the goals and actions that will respond to concerns and recommendations that emerge from needs assessments and other relevant sources.”

Box 4-2

The Diversity Adoption Process

Drawing on the work of Everett Rogers with Floyd Shoemaker (1971), Loden (1996) suggests that, when planning a diversity initiative, findings about how innovations move through an organization should be taken into account. An adoption curve generally follows the introduction of an innovation based on how much risk and opportunity people feel the innovation will bring them. People in organizations fall into five segments distributed along a bell shaped curve. The *innovators* are a small group of people who embrace the change in its initial stages; the *change agents* take an active role in speeding up the wave of adoption. The *pragmatists and skeptics* make up the majority of people in organizations and are slow to adopt an innovation. The pragmatists have to be convinced that the change is for the best, and the skeptics require a lot of support to adopt and innovate. The *traditionalists* fall on the other extreme of the curve. This minority will take up the innovation after almost everybody else. A diversity initiative plan makes sure that the different rates of adoption are considered when particular goals and interventions are chosen. For example, a mentoring program should start with those who fall in the innovator and change agent end of the curve. Only after the program has been successfully piloted and endorsed by the leaders should skeptics and traditionalists be expected to participate.

Other variables affecting adoption should also be considered in a diversity initiative. For example, how *compatible* are the values of diversity with the present organizational culture? How *simple* is it to understand and implement a particular diversity goal? Can the idea be *tested* before full adoption is expected? Are the positive results of embracing a diversity strategy easily *observable*? Can it be shown that a diversity innovation represents an *advantage* over other paradigms or ways of working in the organization? These are the questions that should be explored as part of developing a strategic plan.

Part of the strategic plan (though this may also be an additional phase in the process) must include a vision and definition of diversity. It is especially important that the diversity vision be made part of the organizational vision, or at least, expands on it. The important task at this point is to explore, come to terms with and provide a definition of diversity for the organization that is inclusive and that guides and connects to the core vision and mission of the organization (see Chapter III and Section C.2 above). Many times, the vision and definition of diversity is generated too early in the process and is vague or incomplete, becoming an easy target of criticism. Thus, we recommend that organizations do not attempt to develop a diversity vision before assessing needs and collecting information and examples through educational and benchmarking activities. A good example of an aspirations statement that incorporates diversity is the one developed by Levi Strauss, a retail company, for its leadership:

*[The leadership of Levi Strauss] values a diverse work force (age, sex, ethnic group, etc.) at all levels of the organization, diversity in experience, and diversity in perspectives. We have committed to taking full advantage of the rich backgrounds and abilities of all our people and to promoting a greater diversity in positions of influence. Differing points of view will be sought; diversity will be valued and honestly rewarded, not suppressed.*¹¹⁶

Roosevelt Thomas (1999) suggests that strategic plans in diversity-mature organizations have the following characteristics: 1) they derive from compelling and strategic motives (as identified in

Chapter II); 2) they identify the diversity-related issues that must be addressed in response to an organizational assessment; and 3) they delineate a clear sequence in which the tasks must be implemented.

d. Implementing the plan of interventions

As with any other organizational action plan, the key questions in the implementation stage are *Who? What? When? For Whom and With Whom? and Where?* A variety of options is available here. For example, in answer to *Who?*, leadership and accountability for the intervention can be provided by a task force, committee or council; departments, business units or occupational groups; the office of the designated diversity leader and staff, such as a Gender Unit; the most senior levels in the organization, such as the chief executive; or other key stakeholders, such as the board of directors and unions.

The type of interventions, activities and programs to be selected, the timelines and sequence of events, who will participate, what their roles will be, in which locations and at what organizational levels different interventions will take place are the essence of the implementation plan. A multicultural development model such as Holvino's can guide these decisions best. It is expanded upon in Section e. below.

Regardless of the specifics, the key enablers of a strategic plan are communication, credibility and accountability.¹¹⁷ Without appropriate communication throughout the organization to all employees and at all levels, without a plan of action that makes sense and sets clear priorities, and without clarity about responsibilities, accountability and measures of success, the best intervention plan will fail. Thus, a key aspect of implementing a strategic plan is defining communication and rollout strategies, assigning responsibilities to credible members of the organization, and identifying clear targets of change and measures of success for different organizational members and divisions. Clearly, the involvement of those affected in the planning process will be crucial to the success of the plan. In addition, we want to emphasize the importance of visible leadership from the top, engagement of middle managers responsible for operations, and involvement of "everyday" leaders—"seed carriers"—who will lead the effort through everyday activities and work practices.¹¹⁸

e. Monitoring and evaluating

Monitoring and evaluating are the two components of the evaluation process of a diversity initiative, and often, both components are lacking. By monitoring, we mean being sure that what was planned is being accomplished. By evaluating, we mean determining the impact and results of the planned interventions. Evaluation is one of the most neglected aspects in diversity initiatives and also requires careful planning.¹¹⁹ For example, what is the scope of the evaluation, what information will be sought from the evaluation process, how will information be gathered and from whom, how will the data be used and to whom will it be fed back? When goals and expected outcomes have been made clear during the initial planning process and data has been collected that can serve as a base-line to assess change over time, evaluation is easier to implement, because it provides its own measurements of comparison for before and after the interventions.

Monitoring the representation, advancement and retention of diverse groups is the most common method of assessing diversity efforts, but this approach to monitoring is more appropriate for organizations in the positive action stage of the MCO model. In comprehensive long-term initiatives, other areas to evaluate should include: a) changes in individual attitudes and behavior; b) the impact of specific interventions to promote change in organizational culture; c) the integration of particular diversity strategies in the daily business systems and structures; d) gains in profitability and reduction in costs; and e) the level of satisfaction of members of particular groups in the organization. Specific evaluation methods that can be used are program evaluations, such as evaluation of training or career development programs; organizational surveys to assess workplace climate;¹²⁰ benchmarking with other organizations for comparison purposes; surveys of external recognition and reputation awards such as “best employer” or “community service”; and analysis of indicators of overall performance such as profits, market share and new markets, and of executive performance such as leadership and business unit or departmental performance (see Box 4-3 for additional suggestions on evaluating diversity).

It is important to note that evaluation is crucial if organizational learning on diversity is to occur. Moreover, not paying attention to this step in the process of developing a diversity initiative can undo important progress made and sends a message that diversity is not as serious as other organizational goals.

4. *Strengths and limitations of the organizational development approach to diversity*

The strengths of the organizational development approach to diversity are that:

- it provides a clear focus to the change effort;
- it is similar to other planning processes commonly used in organizations and thus, more familiar;
- it is management driven; and
- the logical and deliberate pace of change promotes a certain amount of organizational security amidst potentially threatening change.

But successful multicultural organizational development approaches also need to consider how they differ from more traditional OD change efforts.¹²¹ They pay more attention to the role of conflict, intergroup dynamics, coalition and alliance building, and power and resistance issues within the context of change.

Box 4-3

Evaluating Diversity through Employee Surveys, not Numbers

Comer and Soliman (1996) state that very few organizations that have invested in diversity efforts monitor and assess whether they are actually achieving their objectives and promoting multiculturalism. They suggest several indicators that move beyond monitoring numerical representation and promotions of diverse groups. These indicators can be grouped in two areas: 1) employee assessment of a positive working climate; and 2) assessment of increased organizational performance. It is important to collect data for different groups of employees so as to determine the impact of changes on employees who are different. New questions to be explored are:

- Do all employees consider systems of performance appraisals, rewards and promotions to be fair and unbiased?
- Do employees have access to important information?
- Do employees have ability to influence decision-making?
- Do employees perceive that they have opportunities to acquire and develop new skills and advance their careers?
- Do employees perceive that they have opportunities for formal and informal mentoring and coaching?
- Have absenteeism and turnover costs declined among all employees?
- Has patronage of diverse customers or clients flourished?
- Has creativity and innovation blossomed?
- Has organizational responsiveness and flexibility increased?

Some of the limitations to the organizational development approach to diversity are that unforeseen organizational changes, such as top leadership shifts, restructuring or a bad economic year, can derail the initiative. If the organization is not able to adapt, learn from the implementation process and revise the initial plans, the effort will be difficult to sustain. It is also important not to rely too heavily on educational programs, policy changes and accountability measures, all common interventions in the organizational development approach, as a way of changing the organizational culture. Moreover, the effort should not be viewed as a human resource initiative, because this removes the managers and other staff from their responsibility to provide leadership.

Box 4-4 provides an example of an OD organizational development approach to diversity.¹²² Organizational development approaches to diversity are particularly suitable for organizations operating in stable environments, in hierarchical organizations where there is strong leadership championing the diversity change agenda, and when there is a critical mass of people who desire change. Collaborative approaches to change offer an alternative that may work best under a different set of organizational conditions.¹²³

Box 4-4**An Example of an Organizational Development Approach to Diversity:
The Training and Development Center of an International Organization**

The initiative started with a request from the director of the Center, via his human resource manager, to engage in “diversity management.” After initial conversations with members of the top management team, the following plan of action was implemented during the first three years.

Activities for the first year focused on developing an initial strategy with the top management team that included: 1) defining the overall global business context and determining the organizational imperative for diversity; 2) informing the workforce of the initiative and the intention to begin to collect information; 3) forming and developing a diversity advisory group composed of representatives of diverse groups in the organization across levels and functions; and 4) identifying and educating the internal liaison for the initiative in the office of a Manager for Inclusion and Organizational Change.

The set of activities implemented at the end of the first year and during the second year were: 5) refining, developing and disseminating the “business imperative” for diversity which identified workforce skills needed for the future, requirements for a successful organizational culture, and leadership competencies required for the future; 6) implementing education and awareness sessions with the top management team and the advisory group; 7) selecting three country sites, plus headquarters, for initial data collection through employee surveys and focus groups; and 8) reviewing recruitment, placement, advancement policies and other human resource practices.

The third set of activities implemented during the second and third year were: 9) analysis of the survey and focus groups results and preparation of a report with recommendations by the consultants; 10) discussion of key data and recommendations from the report in joint session with the top management team, the advisory group and selected interviewees from representative groups in the organization; and 11) agreement on a plan of action to respond to the recommendations. These included: a) in-depth diversity education sessions for managers and advocates; b) changes in recruitment practices, development of new career development paths and implementation of a 360-degree feedback system; and c) interventions involving large numbers of staff in-country to address issues of workplace culture and climate.

Responsibility for implementation of the selected diversity initiatives was assigned to the department heads and other working unit heads. The diversity advisory group, the Office of Inclusion and Organization Change, and the consultants acted as resources. The top management team continued to receive reports and monitor the implementation and results during the first three years.

D. ACTION RESEARCH AND COLLABORATIVE INQUIRY APPROACHES

Action research is a collaborative approach to organizational change that focuses on joint inquiry and learning between internal and external change agents.¹²⁴ Rapoport (1970: 499) provides the following definition:

Action research aims to contribute to the practical concerns of people in an immediate problematic situation and to the goals of social science by joint collaboration within a mutually acceptable ethical framework.

1. Approach

Collaborative inquiry approaches are usually more fluid than organizational development approaches to diversity. Nevertheless, action research usually proceeds with the following seven phases.¹²⁵

- *Entry and set-up* – the inquiry and change goals are agreed upon and internal and external research collaborators develop an initial design and “contract” to collect information.
- *Data collection and inquiry* – information is collected through interviews, focus groups, surveys and other mechanisms.
- *Analysis* – the data are assembled, summarized and organized according to identifiable patterns.
- *Feedback and action planning* – the analysis of the data is shared with the organization in order to develop a joint interpretation, identify change goals and develop action plans.
- *Implementation and experimentation* – actions agreed upon are implemented and organizational experiments to support the change goals are conducted.
- *Monitoring and evaluation* – data are collected to assess the impact of the change initiatives and experiments.
- *Learning, adaptation and further experimentation.*

This process of data collection, analysis and experimentation initiates another cycle of action research, engaging the organization in a continuous and iterative process of inquiry and change. Central to the process of action research is that learning derives from introducing changes or experiments into the system and observing their effects. This may then lead to further adaptations or new interventions.

Although less is published on action research and collaborative inquiry approaches to diversity initiatives, Cumming and Holvino (1997) and Merrill-Sands et al. (1999a, 1999b) provide two concrete examples from the practice of collaborative action research with a multicultural board development intervention and a gender-equity initiative (see Boxes 4-5 and 4-6).

Because collaborative approaches to change are more fluid and are planned in distinct cycles of inquiry, analysis and implementation, Holvino (2000a) suggests that an action research approach to diversity may be more appropriate than long-term and more traditional organizational development approaches. This may be especially so for social change organizations where more stakeholders expect to participate in key organizational decisions, where human and financial resources are scarcer, and where changes in the external environment such as donors’ priorities or national politics are less predictable and more frequent.

Large group collaborative interventions for organizational change, such as future search conferences¹²⁶ and appreciative inquiry¹²⁷ methodology, could also prove to be very powerful in diversity efforts. A unique characteristic of large group interventions is that they simultaneously involve internal and external stakeholders in the change effort and bring the whole system into the room to work together, energizing and involving many organizational members in the process of change.¹²⁸

Box 4-5

BEC: An Example of Collaborative Inquiry with a Social Change Organization¹²⁹

BEC is a small organization whose mission is to advocate on a variety of social issues that affect a very diverse community with a high population of immigrants in the heart of a major USA city. A multicultural board made of representatives of the key groups in the community and an executive director, a white bilingual male, manage the affairs of the organization with a skeleton staff of part-time staff and community volunteers.

Consultants were enlisted to assist the board of directors in becoming more sensitive and effective at managing the cultural, language and class differences among its members. The monthly board meetings were conducted in English and simultaneously translated into three other languages—Portuguese, Spanish and Khmer. The board was having trouble working effectively, yet recognized the importance of learning from, and finding better ways of working with, their very rich and representative social differences.

A collaborative inquiry approach was agreed upon. A videotape was made at a regular board meeting. After the meeting, board members attending the meeting were asked to identify at least one problematic moment they had observed in the meeting and to assess the effectiveness of the meeting using a short evaluation form. A problematic moment is a moment when the group has the opportunity to creatively struggle with its differences and solve a particular problem.

An edited 15-minute version of the videotape was produced containing four problematic moments, which were identified in the course of the two-hour meeting. The tape was shown to the board during a one-day retreat. Analysis of each moment helped the members assess strengths and areas of improvement in the way the board managed itself and its differences. Based on the assessment and discussions, the group drew up action plans designed to improve the board's work and multicultural relations. As a result of the analysis of the problematic moments, the following sustainable improvements were brought to the operation of BEC's board.

- Responsibilities and roles were clarified and an internal board structure was set up consisting of a community outreach committee, a program/staff committee, and a financial/fund raising committee.
- A glossary of multicultural terms used frequently by board members was produced. Interpreters now sit behind, not next to, people receiving interpretation. A way for non-English speaking members to have more input into the agenda was formalized.
- The board members worked on improving their meeting skills and developed multicultural norms for their meetings. The board now meets every month to discuss 5 to 6 issues instead of every two months with 10 to 12 issues.
- Experienced board members began mentoring new board members on key issues affecting the community.

Box 4-6

Action Research Project on Gender Equity and Organizational Effectiveness at the Centro Internacional de Mejoramiento de Maíz y Trigo (CIMMYT)¹³⁰

CIMMYT, an international agricultural research center headquartered in Mexico, had a strong norm in its organizational culture that valued individual achievement and tangible products, such as new plant varieties. This norm resulted in the undervaluing of “support” work done by scientists in disciplines such as biotechnology, pathology and economics, as well as by administrative staff and technicians. This had direct gender consequences, since higher percentages of women were in these roles. It also had consequences for effectiveness, since CIMMYT was seeking to strengthen systems-oriented research, move to a project-based team approach, as well as reinforce its capacity in biotechnology.

This was one of the issues revealed through a three-year action research project undertaken by the Center to improve gender equity. CIMMYT chose the action research approach because it was interested in exploring the more subtle aspects of how gender inequities are manifest in organizational structures, systems, work practices and cultural norms. Moreover, the approach explicitly linked gender equity with organizational effectiveness concerns and this served to galvanize broad support and energy to undertake change.

A team of action researchers designed the project in collaboration with a Task Force comprised of staff from diverse parts of the organization. The research team interviewed more than seventy staff from various backgrounds, workgroups and levels. The researchers then developed a cultural analysis. The analysis focused on deep-seated norms in CIMMYT’s culture that had been beneficial to CIMMYT in the past but were now hindering its ability to move towards its new strategic objectives and to develop a more gender equitable work environment. Examples of the types of norms identified include the undervaluing of “support” cited above, and the persistent valuing of hierarchy as the best way to get things done despite the organization’s commitment to move to a team-based structure.

The researchers presented their analysis to the entire staff and conducted several days of workshops. Staff had the opportunity to work with the analysis, develop it further, and identify critical leverage points for change. This collaborative process unleashed a tremendous amount of energy as staff engaged in designing change projects and action steps. A participatory method was used to set priorities among the many change proposals generated.

CIMMYT decided to focus energy and resources on six change experiments. Some of these, such as strengthening communications between senior management and staff, addressed long-standing problems in fresh ways. Others, such as developing a 360-degree performance appraisal system to give better recognition to collaborative and facilitative work behaviors, were new proposals to address newly understood issues. All the change experiments were designed to “interrupt” the negative effects for equity and effectiveness of the norms surfaced through the analysis.

In the end, four of six of the proposals were implemented, monitored, adapted and evaluated. Important changes were incorporated into core work and management processes at the Center. While the process was not easy nor straightforward, follow-up evaluations indicate that the changes have indeed helped CIMMYT to reposition itself strategically, become more effective, and develop a work environment that better supports the productivity, job satisfaction, and career opportunities of women, as well as men, and of diverse staff in general.

A future search conference is a three-day large group event that helps stakeholders create their shared future vision for their organization. Typically, 60 to 70 participants go through a highly structured meeting to explore the past, present and future of the whole system under consideration. The meeting enables all stakeholders to discover shared intentions and common ground around such issues as how multicultural they want their organization to be. It encourages participants to take responsibility for their own action plans and to make their visions happen.

Appreciative inquiry has led to some notable successes in organizations seeking to better capitalize on staff diversity (see Box 4-7). The appreciative inquiry process consists of a cycle: discovery, dreaming, design and delivery.¹³¹ What distinguishes this from other approaches is its assumption that in every organization, and for every member thereof, something is *going right*, and that there have been at least occasional high points of performance and achievement. Rather than diagnose problems and shortcomings in the discovery phase, appreciative inquiry sets out to document the organization's best moments and the conditions and individual contributions that made them possible. Here the process resembles an internal benchmarking of best practices, identified and narrated by the people who experienced them. As the organization amasses these stories, it can create a new image of itself based on the qualities it has manifested in its moments of excellence.

Box 4-7

From Sexual Harassment to Best Cross-Gender Relations: An Appreciative Inquiry Case¹³²

A large manufacturing organization located in Mexico wanted to make a dramatic cut in the incidence of sexual harassment. In conversations with the appreciative inquiry consultants, the purpose of the intervention was redefined as “develop a model of high-quality cross-gender relationships in the workplace for the new-century organization.”

A small pilot project started with pairs of women and men who worked together nominating themselves to share their stories of creating and sustaining high-quality cross-gender workplace relationships. Hundreds of pairs nominated themselves and one hundred people were trained in appreciative inquiry interviewing. During the next several weeks, 300 interviews were completed, using volunteer interviewees to interview new pairs. The stories collected and documented provided examples of achievement, trust building, joint leadership, practices for effective conflict management, ways of dealing with sex stereotypes, stages of development in cross-gender relations, and methods of career advancement.

A large-group forum was held after the stories had been collected and disseminated, with the interview stories providing the fuel to develop proposals for the future. Some 30 practical proposals were created, such as “Every task or committee, whenever possible, is co-chaired by a cross-gender pair.” Changes in systems and structures were made in order to implement the propositions. One of the most dramatic examples of the impact of the appreciative inquiry intervention was the change made in the composition of the senior leadership group to include more women. In 1997, the organization was chosen the best company in the country for women to work.

(This intervention was designed and facilitated by Marge Schiller and Marcia Worthing.)

Some of the resulting action steps to put the “dream” in operation may involve extending the conditions that enabled successful practices, so that these become the norm rather than the exception. But the very process of appreciative inquiry frequently leads to breakthroughs in an organization’s own sense of what it is capable of achieving, and in its members’ awareness of the richness of resources that were previously latent. Several appreciative inquiry scholar-practitioners attribute this to the deep dialogue of the interview process, which enables the members of an organization to talk about their successes in their own terms.¹³³ Appreciative inquiry proponents argue that this approach does not generate the defensiveness that typically comes with organizational “change” because, rather than asking people to change what they have been doing wrong, it encourages them to do more of what they’ve already been doing right.

2. *Strengths and limitations of collaborative inquiry approaches to diversity*

The strengths of action research and collaborative inquiry approaches to diversity are that they:

- involve many stakeholders in the stages of the change effort, thus generating energy and commitment throughout the whole system;
- develop internal capacity by increasing knowledge and skills of internal change agents;
- promote organizational dialogues, which help identify and surface deep norms affecting equity and effectiveness and the practices that reinforce them;
- generate less resistance than top-down approaches because they tend to involve those likely to be affected by the changes;
- provide access to important information rapidly; and
- integrate the expertise of internal and external change agents.

The limitations of the action research and other collaborative inquiry approaches are:

- it may be difficult to get leadership commitment and resources because specific outcomes are not predictable or set at the beginning of the initiative;
- the participatory process may generate too many agenda items and create unrealistic expectations about change throughout the organization;
- the unbounded nature of the process requires on-going negotiation; and
- lack of grounding in the culture of the organization and an established long-term relationship with the organization and its leadership may hinder the on-going viability of the initiative.

E. TYPES OF INTERVENTIONS AND OTHER CONSIDERATIONS IN DIVERSITY PLANNING

1. *Types of interventions*

Diversity initiatives need to address three different types of organizational change: structural change, cultural change and behavioral change.¹³⁴ Structural, cultural and behavioral changes are synergistic. They become the key leverage points for intervening in a planned diversity initiative. For example, structural changes such as equitable performance and advancement systems may remove “glass ceiling barriers” to the participation of women in organizations, but

if the culture of the organization does not support the advancement of women and the individual behavior of managers who promote them, the overall change goal for gender equity in the organization will not be achieved.¹³⁵ While these types of changes are interrelated in a complex and mutually reinforcing manner, we identify below the scope and examples of specific interventions that are representative of each type. One of the key challenges of a diversity initiative is to include the right mix of interventions that will maximize change by supporting or reinforcing each other.

a. Structural change interventions

These interventions address changes in the groupings of positions and departments in an organization and in the formal systems that guide and control the work of the organization. These changes require interventions which target policies, practices and structures that support or hinder the goals of diversity such as recruitment practices, equal pay and benefits, work-family balance policies, and achievement of proportional heterogeneity in positions across rank, departments and specialization.

Cox (1993) states that *structural integration*, the integration of “minority” group members in key positions, vertically and horizontally across the organizational hierarchy, is an important component of working with diversity effectively. In addition to providing access to decision-making and organizational power, structural integration may help reduce stereotypes and prejudice, provide important role models for the incorporation of other groups into the organization, and diminish the dynamics of tokenism¹³⁶ that many times reduce the effectiveness of employees from non-dominant groups.

Recruitment, advancement and retention programs usually accompany structural integration goals. These can include advising and mentoring, recruiting from new pools of talent, and setting up career development programs and career paths. They can also include changes in current recruitment practices, such as requiring that all interview panels be diverse in their make-up, changing the weight of the interview in the selection process, and reviewing jobs and job descriptions to focus on requirements as opposed to preferences.¹³⁷ Nevertheless, structural integration is not a sufficient component for diversification and when mishandled through practices, such as rigid quotas and non-standard procedures, it may harm more than benefit a diversity initiative.

Other formal processes, which act as barriers to the inclusion, advancement and effectiveness of diverse employees, must also be changed. For example, flexible work schedules, part-time scheduling, compressed work week, job sharing and job rotation, and flexible vacation and sick-leave policies have been shown to bring about the inclusion of different groups by providing more flexibility and helping attract and retain a diversity of employees such as working mothers and fathers, employees with elder care responsibilities and employees from non-dominant religions. While this is not an exhaustive list, other important policies that should be reviewed or implemented are pay equity, benefits for domestic partners of gay and lesbian workers, and employee support programs which address special needs of employees and enhance the quality of life in the workplace, such as counseling services and health and exercise clinics.

b. Culture change interventions

Cultural change interventions address changes that alter the basic assumptions, values, beliefs and ideologies that define the organization's view of itself, its effectiveness, and its environment. These types of interventions, thus, target the informal norms, or "mental models,"¹³⁸ that support or hinder the goals of diversity and that have differential impact on different groups in the organization.

Changing the culture of an organization to value diversity and differences is one of the most difficult challenges in a diversity initiative. Cox suggests that the change goal is to develop a pluralistic culture "characterized by tolerance for ambiguity, an acceptance of a wide range of work styles and behaviors, and the encouragement of diversity in thought, practice, and action."¹³⁹ As Reynolds (1987: 38) advises, the difficulty with changing organizational culture is that:

culture is not the official system of values promulgated by management but a whole range of shared models of social action containing both real and ideal elements. Each layer of the cultural onion is affected by the social context and the channel of communication: the observed behavior; the official document; the things said at meetings; the things said when alone with one's boss; the things said to one's boss when the boss's boss is present; the verbal expression of what the ideal situation should be; and humorous rendering of all of the above.

Many attempts have been made to study and characterize organizational cultures according to major traits exhibited such as a power culture, a role culture, a support culture and an achievement culture.¹⁴⁰ Prescriptions are then made about needed changes according to the strengths and weaknesses of the identified organizational culture type. Education and training interventions also may be implemented with the purpose of changing the culture of an organization, but it is important to understand that training interventions do not change organizational culture. From our perspective, the best way to achieve organizational culture change is to identify the informal practices and beliefs that make up the culture of the organization; analyze the consequences of those beliefs and ways of being and doing, especially how they may impact different groups of employees; and then design and introduce small experiments to change the everyday practices that make up the organizational culture and which sustain the deep structures of belief that underlie it.¹⁴¹

Action research methods can be very effective for understanding an organization's culture and the impact of specific cultural norms and assumptions on both diverse groups of people as well as on the organization's performance.¹⁴² Another specific diagnostic intervention at this level of change, often used in the organizational development approach, is the *cultural audit*. A cultural audit is a series of data collection activities to understand the cultural paradigms operating in an organization. It usually involves studying the socialization of new members, analyzing responses to critical incidents in the organization's history, analyzing artifacts, symbols, rites and rituals, beliefs, values, stories and even the physical layout, and jointly exploring the meaning of these and their impact on organizational climate and effectiveness.¹⁴³ The purpose of a diversity cultural audit is to identify key elements or characteristics of the organizational culture and how these influence the treatment and success opportunities of members of different groups. For Powell (1993: 248), the goals of a cultural audit are to:

uncover biases in decision making regarding recruitment, performance appraisals, promotions, compensation, and other management activities if present, and to identify ways in which the organizational culture, especially if it is monolithic or plural, may put some employees at a disadvantage.

Another intervention that supports organizational culture change includes: sanctioned *affinity, support or interest groups and alliances* which meet to share problems and solutions, learn the organizational norms, develop supportive relations and change strategies; and *ideological negotiations and forms of multicultural conflict resolution* that help resolve conflicts of interest by directly or indirectly addressing value and ideological differences and settling disputes in democratic and participatory ways.¹⁴⁴

c. Behavioral change interventions

Behavioral change interventions address changes in behaviors, attitudes and perceptions among individuals, between individuals and among and between work groups that support or hinder the goals of diversity, especially those among peers and those of managers and organizational leaders. These behaviors include stereotyping, disrespectful interpersonal interactions, and group attitudes reflected in language use and humor, which whether subtle, intentional or not, have the effect of creating a hostile or undermining climate for minority group members. These behaviors have been called “micro-inequities” because they support exclusion and differential treatment towards some people in practices such as restricted information and feedback from supervisors and coworkers, inequitable delegation of tasks, and exclusion from informal social networks and peer support.¹⁴⁵

A common intervention to address individual and interpersonal behavior is *education and training* (see Box 4-8). While many organizations and consultants equate diversity with training programs, we want to emphasize that training is just one of the interventions that focus on changing individual behavior and is limited to that level of change. For example, training cannot change organizational culture, except indirectly when a critical mass of people go through intense and successful training programs and become internal change agents that pressure the organization to implement structural and culture changes. Ellis and Sonnenfeld (1994) identify some of the advantages of training such as raising awareness about indirect discrimination and conferred privilege, providing voice to those who have been historically underrepresented, substituting knowledge and facts for myths and stereotypes about coworkers, and sending a message that diversity is an important initiative throughout the organization. On the other hand, ill-designed and inappropriately conducted training may do considerable harm to diversity efforts. For example, they can create additional stereotypes if the content is too simplistic, or they can alienate dominant groups if the process of training is perceived as favoring some groups at the expense of others. Training interventions can also backfire if they are delivered as a one-shot deal without appropriate follow-up or reinforcement through other interventions.¹⁴⁶

Other important interventions to change behaviors for increased diversity are *coaching* and *multicultural team building*. *Coaching* provides one-on-one support to managers, especially senior managers, to help them identify areas that need development to and support their taking action on those areas. *Multicultural team building* enhances the effectiveness of working teams by paying special attention and developing skills in managing cultural and other social

differences that are impacting the task, the roles members play, the relationships between them and the methods and procedures used to accomplish their work. One important note of caution with behavioral change interventions is that they may rely too much on “fixing the people”¹⁴⁷ or “equipping the minorities,”¹⁴⁸ ignoring the systemic structural and cultural factors that influence individual and group behavior.

Box 4-8

Training: A Rich and Focused Intervention

There are many options for implementing training and education programs to support a diversity initiative. Some authors and consultants define education as a more general approach to gaining knowledge, attitudes and skills in diversity. They differentiate education from training interventions. Others define competency-based training as knowledge-based and behavioral in nature, especially targeted to develop “proven” skills that support diversity. To help decide which type of education and training program to implement, elements such as the overall purpose, the audience, the content and delivery style desired should be considered.

- **Purposes of training programs**

Awareness training: To increase knowledge, ability to empathize, and understanding of the differential impact of the corporate culture by sharing stories and hearing about others’ experiences and challenges. Deals with emotional and rational content of human interactions, exploring how people feel and act in the face of differences.

Skill building: To increase skills in behaving and acting in ways that promote diversity, such as cross-cultural communication and conflict resolution.

Orientation and information dissemination: To increase knowledge by disseminating information about new policies that impact diversity such as sexual harassment or communicating the status of a diversity initiative.

Dialogue groups: To increase the opportunity for candid conversations to occur between individuals and groups in a relatively unstructured format on an ongoing basis.

- **Types of content**

Cross-cultural training, bias reduction, managing diversity and general policy orientation programs are just a few of the types of content areas that differentiate training programs.

- **Target audience**

Programs may be developed for different target populations such as mid-level managers, first line supervisors, technical staff, working teams, general population and internal change agents.

Other considerations are off-the-shelf or customized training, internally delivered or delivered by external consultants, off-site or on-the-job; short or longer duration, stretched over a period of time or one-time; phased into a sequence of programs, and voluntary or mandatory.

2. *Selecting specific interventions*

For each of the types of changes described above there exists a wide range of specific interventions or activities. Many interventions, such as *mentoring*, impact more than one level of change (see Box 4-9).

Box 4-9

Diversified Mentoring Programs

Mentoring is an example of an intervention that can address three levels of organizational change - behavioral, structural and cultural. That is why it is considered a powerful and attractive intervention in diversity efforts. But mentoring is also a complex intervention that requires careful planning. In a diversity initiative, the purpose of mentoring programs is to support the career development of “targeted” groups by helping identify and develop specific individuals in the organization. The assumption is that members of non-dominant groups do not have the same access to informal mentoring opportunities that may accrue more easily to members of dominant groups. Catalyst, a non-profit research organization focusing on gender issues in corporations, found out that the single greatest barrier to advancement as reported by women of color in the United States was the lack of mentors.¹⁴⁹ The importance of mentoring for individual advancement, effectiveness and well being has been well established. Ragins (1995), for example, identified that individuals with mentors receive more promotions, advance faster and receive greater compensation than those without mentors. They also report greater positional power, greater access to important people and more influence over organizational policy. Kram (1985) and David Thomas (1990, 1993) suggest that mentors have two basic functions: career functions and psychosocial functions. Career functions include giving career advice, advocating and sponsoring, securing exposure and visibility, coaching, providing performance feedback and giving challenging assignments to the protégé. Psychosocial functions include role modeling, helping protégés maintain self-esteem and professional identity, counseling and providing friendship.

Cross-gender or cross-race mentoring relations have been recognized as more difficult to establish and maintain than same-gender or same-race relations. For example, Thomas (1990, 1993) found that same-race relationships provided significantly more psychosocial support than cross-race relations. In one study, Ragins (1995) found that protégés from higher socioeconomic backgrounds had higher promotion rates than protégés from lower socio-economic backgrounds. In spite of these difficulties, cross-mentoring or diversified relations have a positive impact on protégés and mentors. They can also help strengthen the culture of diversity in an organization by: a) providing examples of successful diverse relations; b) encouraging in-depth knowledge of individuals across race and gender boundaries, for example; and c) modeling norms of developmental support and collaboration in the organization. If successful mentoring programs are institutionalized, the organization also benefits from changes in its structure, norms and practices, which benefit all members.

Various authors identify the following characteristics of successful mentoring programs: 1) anchor them in the organizational imperative for change; 2) set clear and realistic expectations and understanding among participants about the process of mentoring and mentoring relations; 3) provide ongoing support to both mentors and protégés involved in the program, such as skill building training; 4) develop reward systems and institutionalize the mentoring functions in performance appraisal and staff development systems; 5) use a selection and matching process that empowers both mentors and protégés; 6) involve the participant’s supervisors in appropriate roles; 7) start with a prototype or pilot; 8) avoid common mistakes by researching and benchmarking other programs; 9) select champions to administer and sponsor the program; and 10) monitor the progress of participants and incorporate learnings from the program into its ongoing implementation.¹⁵⁰

In addition, different interventions are more appropriate for different stages of multicultural organizational development (see Section C-1). For example, in the exclusive stage, organizations benefit most from *legal interventions* and having to respond to *external pressures for change*. In the passive club stage, organizations will benefit from revising and opening up the *recruitment process* to increase the numbers of under-represented groups, making a special effort to recruit “pioneers” who are willing to lead organizational change, and *adopting policies* to prevent socially-based harassment.

In the compliance stage, *mentoring, networks and education programs* help create a climate for change and foster a critical mass of employees to support change. In the positive action stage, an *expanded vision of diversity, identifying and developing internal change agents*, working with *pockets of readiness* to initiate culture change experiments, and instituting diversity *accountability measures* in performance evaluations have proven to be successful interventions.

In the redefining and multicultural stages, *inclusive policies and structures* such as *self-managed teams, win-win conflict skills training, organizational learning, reviewing and renegotiating norms*, and *involvement of external stakeholders* are interventions that support a continuous change process for inclusion and diversity.

In all, effective diversity efforts require a multilevel approach that includes structural, cultural and behavioral change and a variety of specific interventions that reinforce and augment each other. Morrison (1993) summarized the ten most important diversity interventions identified in her benchmarking research with corporations in the United States. They appear here in the order of importance assigned by her team based on their survey and interview information:

- personal involvement of the top management and organizational leaders;
- recruitment of diverse staff in managerial and non-managerial positions;
- internal advocacy and change agent groups;
- emphasis on collection and utilization of statistics and diversity organizational profiles;
- inclusion of diversity in performance appraisal and advancement decisions;
- inclusion of diversity in leadership development and succession planning;
- diversity training programs;
- support networks and internal affiliation groups;
- work-family policies; and
- career development and advancement.

While organization-wide interventions such as training programs and support networks are an important part of a diversity change initiative, diversity initiatives must also include interventions that address the needs and opportunities of work within specific work units; for example, conducting a multicultural team-building intervention with a virtual project team. It is often in the smaller work units that experiments can be designed and tested. Innovations can then be dispersed throughout the organization.¹⁵¹

F. IMPLEMENTING DIVERSITY: ADDITIONAL LESSONS FROM THE FIELD

In closing this section, we think it is important to share some of the lessons and insights that have emerged from working with diversity in practice. We have drawn on our own experience as well as that of other external and internal change agents who have worked extensively with diversity.

1. *Deployment and involvement of change agents*

In order to maximize the impact of a diversity change effort, it is important to involve and deploy external and internal change agents in the selection and implementation of specific interventions, as their different perspectives, roles and skills can complement each other. Usually, the role of an external consultant is to provide expertise and support to the designated persons accountable for the initiative. S/he will recommend particular approaches and help develop a strategy for the effort, including how to organize internal resources, involve different constituencies and design and implement specific interventions. But an organization may also choose to implement a diversity initiative only with internal resources. In this case, a good way to organize human resources is to have a director of diversity, a diversity council and an executive group sharing responsibility and accountability for the initiative.

It is difficult for internal change agents to have the organizational credibility, enough power and influence, and the overall support required to create and manage a diversity initiative on their own. The strength of internal change agents lies in their knowledge of the organizational culture and systems and their ability to access resources and organize targeted interventions such as recruitment, mentoring, statistical analysis of the workforce, and training. But, large organizational change efforts require the support of external change agents who bring an outsiders perspective and external credibility and experience. In our opinion, the combination of internal change agents, external consultants, executive leadership and other key stakeholders produces the best results for developing and implementing a successful diversity initiative. (See Annex II for more on the specific roles each of these groups can play in a diversity change effort.)

2. *Avoiding common diversity “traps”*

We have identified common mistakes to avoid in trying to bring about diversity change, learned from experience and from practice, especially in the context of United States-based organizations and their international affiliates.¹⁵² Some of the “traps” identified are:

- assuming that short-term training will be enough;
- failing to relate diversity to the organizational mission and key products;
- waiting to collect all possible data and ignoring employee perceptions as data for taking action;
- waiting for everyone important to be thoroughly behind the effort;
- not paying attention to the impact of resistant people in important positions;

- isolating the effort in one department (such as human resources) or under one person;
- not differentiating between the intent, usually verbal, to support diversity and the reality of the effect of institutional actions that go against diversity in spite of the intent;
- not building coalitions and support among different stakeholders that may fear that the diversity effort will not include them;
- assuming that managing diversity is just “good common sense and people skills;”
- measuring success by the quantity and magnitude of diversity activities and events, rather than the impact on work and people.

3. *Tips for international organizations*

Based on our experience initiating, designing and implementing diversity change efforts in international contexts, we want to add the following tips.

- *Make special efforts to identify and utilize in-country resources* to provide demographic data, cultural and social science research, and other relevant diversity information on an on-going basis. National universities, local research organizations and think tanks, social action groups and other profit and non-profit organizations working on diversity are often overlooked, but are important local resources to be integrated into a diversity initiative, especially at the beginning of the change effort.
- *Partner local resources with external resources* in order to develop the capacity of country nationals to work on organizational diversity and to ensure that external consultants understand and respond to the local context. Nurture and provide the opportunity for these partnerships to become role models of successful cross-mentoring and multicultural teamwork.
- *Pay attention and respond to the national social context and constraints* but also accept responsibility for providing leadership in changing accepted patterns of social behavior that are no longer suitable in a multicultural and global environment. For example, low accountability from government agencies in regards to anti-discrimination laws should not be taken as a reason for “not taking action” by international organizations initiating diversity efforts

4. *Indicators of progress*

To guide and instill momentum into the change effort, it is important to identify success indicators and develop realistic, but not complacent, measures of progress. This is essential for working with diversity in a way that responds to the organizational vision and to the social and cultural realities of the specific organizational context. Box 4-10 provides an example of indicators of diversity progress that can be adapted to specific organizational and national realities.

Box 4-10**Indicators of Progress in Effectively Managing Diversity¹⁵³**

The *organization* is working creatively with diversity when the following are in effect.

- Diversity strategies are integral to organizational strategies and objectives.
- Diversity is viewed as contributing to organizational effectiveness.
- Diversity is recognized as a long-term organizational investment that naturally involves complexity and constructive conflict
- Managers take ownership for the strategy by setting visible goals and by serving as positive role models.
- People of diverse backgrounds work at all levels and departments of the organization.
- Diversity is an explicit goal in recruitment strategies.
- There is equity in employment actions and systems.
- Diversity is integral to the organization's operating principles and values and these are recognized as driving organizational behavior.
- Diversity objectives are set and met, from the top to the bottom of the organization.
- Organizational issues and personnel grievances are resolved effectively, with active, appropriate input/participation from all levels.
- Employee issues are raised and heard with respect and honesty and are resolved in an effective, timely manner.
- Information flows unencumbered to those who need it to work effectively.
- Expertise is trapped in strategic decision-making no matter where it resides in the organization.
- Individuals hold themselves accountable for their actions.
- Managers are trained, assessed, held accountable and rewarded for managing people of diverse backgrounds effectively.
- Managers are rewarded for integrating diversity objectives and practices within their work initiatives and programs.
- The organization is viewed by its employees, clients, and other stakeholders as an ethical player in its professional area and in the community where it is located.
- The organization is viewed as a benchmark for best practices in diversity, by employees and by the public.
- The organization's products and outputs reflect a broad and diverse client base and partner network.
- The organization continually assesses and learns about the dynamics of diversity and their impact on the people and the work of the organizations.

- ¹ Cox and Blake (1991); Henderson (1994); Kossek and Lobel (1996); Morrison et al. (1993); Robinson and Dechant (1997).
- ² We gratefully acknowledge the excellent research support provided by Erica Foldy, Research Associate at the Center for Gender in Organizations, in reviewing the literature for this chapter.
- ³ Cox (1993); Ely and Thomas (Forthcoming); Jehn et al. (Forthcoming); Morrison (1996); Thomas and Ely (1996); Thompson and Gooler (1996).
- ⁴ Alderfer (1987); Cox (1993); Cox, Lobel, and McLoed (1991); Fine (1995); Jackson (1991); Kossek and Lobel (1996); Nkomo and Cox (1996); Thompson and Gooler (1996). Jackson (1991:152) notes that "There is considerable empirical evidence showing that attitudes are not randomly distributed throughout the population. Instead, attitudes, values, and beliefs vary systematically with several demographic variables."
- ⁵ Cox (1996); Jackson (1991); Pelled (1996).
- ⁶ Bantel and Jackson (1989); Hillman (Forthcoming); Kanter (1983).
- ⁷ Amabile (1998); Ancona and Caldwell (1992); Cox (1993); Cox, Lobel, and McLoed (1991); Fine (1995); Guzzo et al. (1995); Hoffman and Maier (1961); Jackson (1991); Kossek and Lobel (1996); McGrath (1984); McLeod and Lobel (1992); Maznevski (1994); Nemeth and Christensen (1996); Nkomo and Cox (1996); Shaw (1981); Tsui et al. (1995); Wanous and Youtz (1986); Watson et al. (1993); Wood (1987).
- ⁸ Ancona and Caldwell (1992); Maznevski (1994); Northcraft et al. (1995); Thompson and Gooler (1996); Watson et al. (1993).
- ⁹ Center for Creative Leadership (1995); Cox (1991); Jackson et al. (1991); Jackson and Ruderman (1995); Jehn et al. (Forthcoming); Mohrman et al. (1995); Thompson and Gooler (1996).
- ¹⁰ Guzzo et al. (1995); Jackson and Ruderman (1995); Merrill-Sands and Sheridan (1996); Ruderman et al. (1996).
- ¹¹ Canney Davison and Ward (1999).
- ¹² Bartlett and Ghoshal (1987); Huxham (1996); Jackson et al. (1995); Merrill-Sands and Sheridan (1996).
- ¹³ Alexander et al. (1996); Ancona and Caldwell (1992); Bantel and Jackson (1989); Baugh and Graen (1997); Cox (1993); Cox and Finley (1995); Elsass and Graves (1997); Gordon et al. (1991); Jackson (1991); Jehn (Forthcoming); McGrath et al. (1995); Millikin and Martins (1996); Nkomo and Cox (1996); Pelled (1996); Ruderman et al. (1996); Sessa and Jackson (1995); Smith and Berg (1997); Watson et al. (1993); Watson et al. (1998).
- ¹⁴ Adler (1986); Alexander et al. (1996); Ancona and Caldwell (1992); Cox (1993); Cox and Blake (1991); Jackson (1991); Jackson et al. (1995); Maznevski (1994); Nkomo and Cox (1996); Sessa and Jackson (1995); Thompson and Gooler (1996); Tsui et al. (1995); Watson et al. (1993).
- ¹⁵ Byrne (1971).
- ¹⁶ Alderfer (1987); Nkomo (1992); Nkomo and Cox (1996); Sessa and Jackson (1995).
- ¹⁷ Canny Davison and Ward (1999); Gray (1989); Jackson et al. (1995).

- ¹⁸ Adler (1996); Canney Davison and Ward (1999); Funakwa (1997); Maznevski (1994); Thompson and Gooler (1996).
- ¹⁹ Watson et al. (1998).
- ²⁰ Cox (1993); Cox and Blake (1991); Ely and Thomas (Forthcoming); Jackson and Ruderman (1995); Kossek and Lobel (1996); Morrison (1996); Thomas and Ely (1996).
- ²¹ Ely and Thomas (Forthcoming); Northcraft et al. (1995); Thomas and Ely (1996).
- ²² Funakwa (1997); Hillman et al. (Forthcoming); Jackson et al. (1995).
- ²³ Ely and Thomas (Forthcoming); Thomas and Ely (1996).
- ²⁴ Adler and Izraeli (1994); Cox and Blake (1991); Jackson et al. (1995); Morrison et al. (1993); Sinclair (1998).
- ²⁵ Jackson et al. (1995); Reagan (1999).
- ²⁶ Cox (1993); Morrison (1992).
- ²⁷ Comer and Soliman (1996); Cox (1993); Cox and Blake (1991); Ely and Thomas (Forthcoming); Fine (1995); Kolb et al. (1998); Kossek et al. (1996); Meyerson and Fletcher (2000); Morrison et al. (1993); Thomas and Ely (1996).
- ²⁸ Chatman (1991); Jackson (1991); Joplin and Daus (1997); McCain et al. (1983); Milliken and Martins (1996); Morrison (1992); O'Reilly et al. (1989); O'Reilly et al. (1991); Pelled (1996); Tsui et al. (1992); Wagner et al. (1984); Wiersema and Bird (1993).
- ²⁹ Chatman (1991); Jackson (1991); Morrison (1992); O'Reilly et al. (1989); O'Reilly et al. (1991); Tsui et al. (1992).
- ³⁰ Eisenberger et al. (1990); Kossek and Lobel (1996).
- ³¹ Adler (1986); Canney Davison and Ward (1999); Huang and Harris Bond (1974); Laurent (1986).
- ³² Di Tomaso et al. (1996); Kosek and Zonia (1993); Pelled (1996); Tsui et al. (1992).
- ³³ Byrne (1971); Hoffman (1985); Lincoln and Miller (1979); O'Reilly et al. (1989); Tsui and O'Reilly (1989); Tsui et al. (1995).
- ³⁴ Morrison (1992).
- ³⁵ Cook (1999).
- ³⁶ Joshi and Merrill-Sands (1998).
- ³⁷ Cox and Blake (1991); Kolb et al. (1998); Kossek and Lobel (1996); Merrill-Sands (1998); Meyerson and Fletcher (2000); Scully and Creed (1999).
- ³⁸ Adler (1986); Bartlett and Ghoshal (1989); Funakawa (1997); Gergen (1995).
- ³⁹ Scully and Creed (1999).
- ⁴⁰ Merrill-Sands et al. (1998); Merrill-Sands et al. (1999a, 1999b).
- ⁴¹ Joshi and Merrill-Sands (1998); Merrill-Sands (1998); Merrill-Sands et al. (1999b); Merrill-Sands et al. (1999c); Scherr and Merrill-Sands (1998); Spink et al. (1999).
- ⁴² See example of The Body Shop in Kolb and Meyerson (1999); Palmer (1994)
- ⁴³ Berresford (1991); Holvino (2000a); Rao et al. (1999b).

- 44 Applebaum et. al. (2000).
- 45 Teicher and Spearitt (1996).
- 46 Kossek and Lobel (1996).
- 47 Hillman et al. (Forthcoming).
- 48 Kuczynski (1999).
- 49 Kirkham (1996); Nkomo and Cox (1996); Wharton (1992).
- 50 Cross and Blackburn White (1996); Ely and Thomas (Forthcoming); Kirkham (1996); Thomas and Ely (1996).
- 51 Nkomo and Cox (1996).
- 52 Essed (1990, 1996); Nkomo and Cox (1996); Wharton (1992).
- 53 This is what Cross et al. (1994) have referred to as the “isms”: classism, racism, sexism, heterosexism, and ethnocentrism.
- 54 Alderfer (1992); Cox (1993); Cox and Blake (1991); Ely and Meyerson (1998); Ely and Thomas (Forthcoming); Nkomo and Cox (1996); Thomas and Ely (1996).
- 55 Alderfer (1992); Bell, Denton and Nkomo (1993); Bell and Nkomo (1992); Holvino (1994); Hurtado (1989); Mama (1995).
- 56 Nkomo and Cox (1996); Ferdman and Gallegos (Forthcoming); Foldy (1999); Wharton (1992).
- 57 Catalyst (1999); Center for Gender in Organizations (2000); Crenshaw (1993); Ely and Meyerson (1998); Holvino (1999); Hurtado (1999); Hurtado and Stewart (1996); Marks (Forthcoming); Proudford (1998)
- 58 Catalyst (1999).
- 59 Center for Gender in Organizations (2000); Hurtado (1989, 1999); Marks (Forthcoming); Proudford (1998).
- 60 Ferdman (1995); Foldy (1999); Nkomo and Cox (1996); Ragins (1997); Wharton (1992).
- 61 Jackson et al. (1995); Kirkham (1996); McGrath et al. (1995).
- 62 Avigor (1953) cited in Triandis (1995).
- 63 Cited in Canney Davison et al. (1999: 59).
- 64 Acker (1990); Collinson and Hearn (1994); Crenshaw (1993, 1992); Crowfoot and Chesler (1996); Ely (1996); Essed (1990); Fine (1996); Fletcher and Merrill-Sands (1998); Guinier (1998); Hurtado (1989, 1997, 1999); Hurtado and Stewart (1996); Jacques (1999); Kirkham (1996); Kolb et al. (1998); Martin (1996); McIntosh (1990); Tajfel (1982).
- 65 Canney Davison and Ward (1999); Sessa and Jackson (1995).
- 66 Crowfoot and Chesler (1996); Ely (1996); Fine (1996); Hurtado and Stewart (1996); Kossek and Zonia (1993); McIntosh (1990); Nkomo and Cox (1996); Tsui et al. (1992); Valian (1998).
- 67 Crowfoot and Chesler (1996); Proudford (1998); Scully and Creed (1999).

⁶⁸ Acker (1990); Alderfer (1992); Bond and Pyle (1998); Cole and Singer (1991); Cross and Blackburn White (1996); Ely and Meyerson (1998); Fletcher and Merrill-Sands (1998); Greenhaus et al. (1990); Kirkham (1996); Kolb et al. (1998); Meyerson and Fletcher (2000); Morrison et al. (1993); Sessa and Jackson (1995); Nkomo (1992); Nkomo and Cox (1996); Ragins (1995); Valian (1998).

⁶⁹ Gilligan (1982); Kabacoff (1998); Powell (1993); Rosener (1990).

⁷⁰ Creed and Scully (Forthcoming).

⁷¹ Holvino (1999); Holvino (2000b); Mahony and Zmroczek (1997).

⁷² This section has been written by James Cumming who took the lead in reviewing the literature and drafting this section with significant contributions from Sue Canney Davison.

⁷³ Adler (1986); Canney Davison and Ward (1999); Funakawa (1997); Parker (1999).

⁷⁴ Robinson (1985).

⁷⁵ Hall (1966); Lammers and Hickson (1979).

⁷⁶ Hofstede (1985).

⁷⁷ Salaman (1978).

⁷⁸ We note, however, that some researchers question whether cultures are comparable at all. They claim that the specific meaning of all concepts, such as power, leadership and organization, is fully determined by the cultural context that gives it meaning. Therefore, you cannot meaningfully compare these concepts across cultures. Instead, they try to understand the behavior of people in a culture from their point of view and believe that ultimately to understand someone from another culture hinges on the internal development of new or synthesized meaning for each learner (Geertz 1973).

⁷⁹ Redding (1994); Sondergaard (1994).

⁸⁰ Based on Funakawa (1997) and Hofstede (1980).

⁸¹ This section on Trompenaars draws heavily on a review of his work by Sara Scherr (1998).

⁸² Tung (1988).

⁸³ Nkomo and Cox (1996).

⁸⁴ Adapted from Olsson 1985. Copyright 1995, Chaos Management, Ltd.

⁸⁵ Cray and Mallory (1998).

⁸⁶ Hickson et al. (1974).

⁸⁷ Bartlett and Ghoshal (1989); Funakawa (1997); Gergen (1995).

⁸⁸ Parker (1999).

⁸⁹ Alvesson (1994).

⁹⁰ Czarniawaka-Joerges and Joerges (1990).

⁹¹ Gioia et al. (1989).

⁹² Research on the use of English for international communication is being conducted in the Cultural Learning Institute of the East-West Center in Hawaii and much has been published about what makes a language useful in the global context. A book by David Crystal (1997) manages to steer even-handedly through the minefield of political debate about the cultural hegemony of English.

⁹³ Ancona and Caldwell (1992); Jackson et al. (1995); Northcraft et al. (1995).

- ⁹⁴ Research by Cox and Finley (1995) and reported in Box 3-10 is an exception.
- ⁹⁵ Knowledge workers are people with highly developed and of specialized knowledge sets, such as scientists, engineers, marketers, lawyers and doctors. “Most have gone through extensive education and training, becoming steeped in the ‘thought-world’ of their discipline. They have learned to attend to certain aspects of their environments, to value particular approaches to work and ways of thinking, to filter information to conform to their paradigms of understanding and action, and to value particular outcomes” (Mohrman et al. 1995: 16).
- ⁹⁶ Alexander et al. (1996); Ancona and Caldwell (1992); Bantel and Jackson (1989); Wiersema and Bantel (1992). This lens reflects much of the earlier research on the impact of diversity on team and work group outcomes; see Hoffman (1985); Hoffman and Maier (1961); McGrath (1984); Shaw (1981).
- ⁹⁷ Thomas and Proudford (2000: 53).
- ⁹⁸ Jackson et al. (1995); McGrath et al. (1995); Northcraft et al. (1995).
- ⁹⁹ Trice and Beyer (1993).
- ¹⁰⁰ Cohen (1981); Dearborn and Simon (1958). Often, specific occupational specializations tend to be populated by specific identity groups which may also contribute to distinct work cultures (Alderfer 1987).
- ¹⁰¹ Jackson et al. (1995).
- ¹⁰² Ancona and Caldwell (1992); Bantel and Jackson (1989).
- ¹⁰³ Idea Connections Consulting, Rochester, NY.
- ¹⁰⁴ Briggs Myers (1990); Eigel and Kuhnert (1996); Hirsh and Kummerow (1990); Kroeger and Thuesen (1992).
- ¹⁰⁵ Jackson (1992); Sessa and Jackson (1995).
- ¹⁰⁶ Cox and Finley (1995). Pelled (1996) argues that differences based on visible traits (such as race, gender, age) are more likely to generate affective conflict with more severe consequences for team performance, while those traits that are less visible and more job related (e.g. functional specialization or educational background) are more likely to generate substantive conflict.
- ¹⁰⁷ Alderfer (1987); Alderfer et al. (1980); Alderfer and Smith (1982); Wells (1982).
- ¹⁰⁸ Proudford (1998); Thomas (1989); Thomas and Proudford (2000).
- ¹⁰⁹ Hayles and Russell (1997); Kotter (1995); Loden (1996); Merrill-Sands (1998).
- ¹¹⁰ Meyerson and Fletcher (2000); Weick (1984).
- ¹¹¹ Chesler (1994); Jackson and Holvino (1988); Katz and Miller (1988); Miller and Katz (1995)
- ¹¹² This model is similar to those developed by Adler (1983); Cox (1991); Jackson and Holvino (1988); Katz and Miller (1988); and Kolb et al. (1998). Also, work by authors such as Palmer (1989); Roosevelt Thomas (1990); and Thomas and Ely (1996) on paradigms of diversity, such as affirmative action, valuing differences and managing diversity, imply that different perspectives and visions of diversity guide the process of organizational change.
- ¹¹³ Holvino, © Chaos Management, Ltd. (1998).
- ¹¹⁴ Arredondo (1996); Cross (1992); Jackson and Hardiman (1994); Katz and Miller (1988); Loden (1996); Miller (1998); and Thomas (1992).

- ¹¹⁵ See Potts, The Diversity Assessment Survey, for an example of a data collection instrument focusing on race and gender issues in organizations.
- ¹¹⁶ Howard (1990) cited in Kossek and Lobel (1996).
- ¹¹⁷ Arredondo (1996).
- ¹¹⁸ Meyerson and Scully (1999); Senge (1990).
- ¹¹⁹ Comer and Soliman (1996); Digh (1998); McEnrue (1993); Stephenson and Krebs (1993).
- ¹²⁰ Kossek and Zonia (1993) define diversity climate as the individual's perceptions and attitudes regarding the importance of diversity in the organization and the perceived qualifications of women and racio-ethnic minorities.
- ¹²¹ Chesler (1994); Chesler and Delgado (1987); Prasad et al. (1997).
- ¹²² See also White (1996).
- ¹²³ Bunker and Alban (1997); Chesler (1994); and Holvino (1993), for example, make this case.
- ¹²⁴ Greenwood and Levin (1998); Rapoport (1970); Whyte (1991).
- ¹²⁵ Greenwood and Levin (1998); Merrill-Sands et al. (1999a, 1999b); Rapoport et al. (1999); Whyte (1991).
- ¹²⁶ Weisbord (1992); Weisbord and Janoff (1995).
- ¹²⁷ Bunker (1990); Cooperrider (1990); Cooperrider and Srivasta (1987); Elliot (1999).
- ¹²⁸ Stakeholders refer to actors or parties who have some involvement or interest in the outcomes or business of an organization. Weisbord and Janoff (1995) identify stakeholders important to consider in an organizational intervention as people with information, people with authority and resources to act, and people affected by what happens.
- ¹²⁹ By James Cumming and Evangelina Holvino, © Chaos Management, Inc., 1997.
- ¹³⁰ Merrill-Sands et al. (1998; 1999a, 1999b, 1999c). For other examples of action research change projects using a similar methodology, see Kolb and Merrill-Sands (1999); Meyerson and Fletcher (2000); Rapoport et al. (1996).
- ¹³¹ Elliott (1999); Hammond (1996); Hammond and Royal (1998).
- ¹³² In Holman and Devane (1999: 250-251).
- ¹³³ Bushe (Forthcoming); Elliott (1999).
- ¹³⁴ Ragins (1995).
- ¹³⁵ Acker (1990); Kolb et al. (1998); Merrill-Sands (1998); Meyerson and Fletcher (2000); Thomas and Ely (1996).
- ¹³⁶ Kanter (1977) explored four key dynamics of tokenism that occur when minority members are in the position of being a small proportion of a group or organization: increased visibility, pressures to assimilate, emphasis on differences from the dominant group, and stereotyping. See also Ely (1994).
- ¹³⁷ Structural change interventions that have been proposed and/or used in the Centers are summarized in Joshi and Merrill-Sands (1998); Joshi et al. (1998); and in Scherr and Merrill-Sands (1999).

- ¹³⁸ Mental models are “deeply ingrained images and assumptions...which we carry in our minds of ourselves, other people, institutions.... Like panes of glass, framing and subtly distorting our vision, mental models determine what we see and how we act. Because mental models are usually tacit, existing below the level of awareness, they are often untested and unexamined” (Senge et al 1994: 235-236).
- ¹³⁹ Ragins (1995).
- ¹⁴⁰ Harrison and Stokes (1992).
- ¹⁴¹ Kolb and Merrill-Sands (1999); Merrill-Sands et al. (1999a); Meyerson and Fletcher (2000); Rao et al. (1999a).
- ¹⁴² Fletcher and Merrill-Sands (1998); Kolb and Merrill-Sands (1999); Merrill-Sands et al. (1999b).
- ¹⁴³ Chung (1997).
- ¹⁴⁴ Chesler (1994); Jackson and Holvino (1988).
- ¹⁴⁵ Cole and Singer (1991); Ragins (1995).
- ¹⁴⁶ Grace (1994).
- ¹⁴⁷ Smith et al. (1989).
- ¹⁴⁸ Kolb et al. (1998).
- ¹⁴⁹ Catalyst (1999).
- ¹⁵⁰ Boags (1998); Jeruchim and Shapiro (1992); Kram (1985); Lindenberger and Zachary (1999); Wasserman, Miller and Johnson (1991).
- ¹⁵¹ Merrill-Sands et al. (1999a); Meyerson and Fletcher (2000).
- ¹⁵² Katz and Miller (1988); Kirkham (1992); Thomas R. et al. (1999).
- ¹⁵³ Revised and adapted from Laura Moorehead, Joppa Consulting, training materials, 1999.

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GLOSSARY OF TERMS IN THE DIVERSITY FIELD

Assimilation: Usually refers to the loss of the original ethnic identity as a person is absorbed into the dominant culture in an attempt to adjust to what is required.

Acculturation: The multiple aspects and processes by which an individual or group from one culture enters and negotiates in a different culture for an extended period of time. The following aspects are related to the process of acculturation: language use and preference; generational distance; cultural identity with or alienation from a dominant culture; association with members of one's own culture.

Bicultural/Multicultural: The ability of an individual to participate actively in several cultures without having to negate one's ethnic identity.

Classes: Groups of people who share sufficiently similar economic circumstances to have common interests and the potential to recognize and act on those common interests as collective agents.

Classism: A system of oppression that gives one group power and privilege over another group based on income and access to resources (Stout 1996).

Cross cultural management: Includes the following approaches and types of studies: a) unicultural: those which focus on the management of organizations in any country other than the USA, such as motivating workers in Israel; b) comparative: those which focus on a comparison between/among the organizations in any two or more countries or cultures, such as a comparison between leadership styles in Brazil and Japan; and c) intercultural: those which focus on the interaction between/among organization members from two or more countries or cultures, such as a description of the process of negotiation between the Chinese and the French.

Cultural identity: Seeing and addressing oneself in relation to one's own ethnic or cultural group.

Discrimination: The behavior, act or unequal treatment towards a person because s/he is a member of a particular social group. Usually involves determining accessibility of goods and services as well as rights and privileges for the targeted group by the dominant group (Essed 1996).

Indirect discrimination is equal treatment in equal circumstances, but under unequal social conditions. When one group is the norm for whom institutional rules are formulated, which are then applied to everybody else including different ethnic groups that have other norms, e.g., food served in the canteen.

Direct discrimination is unequal treatment in equal circumstances under racially unequal social conditions, implicitly or explicitly, e.g., "No blacks allowed in this club," vs. "Sorry, members only."

Domestic partnership: A life attachment between two people that is not legally declared a "marriage." Domestic partner benefits usually apply to same sex partners for whom marriage is not a legal option.

Equality: In a liberated society, equality includes the following aspects of egalitarianism: equality of opportunity, equal satisfaction of basic needs, legal equality, economic equality and political equality.

Equity theory: Argues that actors in exchange relationships expect to receive rewards or outcomes that are roughly proportional to their inputs or contributions. In other words, a “fair rate of exchange.”

Ethnic group: A group socially defined on the basis of cultural characteristics of diverse types such as language, religion, kinship organization, dress and mannerism, or any other set of cultural criteria deemed relevant to the actors concerned.

Ethnocentrism: The attitude that one’s own ethnic group—its patterns of interaction and its culture—is superior to other groups.

Gay: Males who are primarily attracted to and have their primary affectional and sexual relationships with other men.

Gender: The social organization of the relation between the sexes; the meanings socially attributed to the differences between women and men.

Homophobia: The fear of homosexuality. Homophobia can be seen as part of the dynamics of sex marking needed to sustain sexism.

Identity groups: Members of social identity groups share common biological and/or socio-cultural characteristics, participate in equivalent historical experiences and, as a result, share similar world views and interests.

Institutional racism/sexism: When the outcome of organizational policies, practices and arrangements results in unequal distribution of benefits and opportunities based on race/sex. In these situations, the values, norms, beliefs, standards and expectations of a dominant group (such as white, heterosexual, males) become the basis for organizational arrangements, policies, practices and appropriate behaviors. The power to control resources, determine access, reward and punish behaviors, distribute benefits and privilege is lodged in norms of the dominant group and access is denied to people of different identity groups, such as people of color and white women.

Justice: Appropriate distribution throughout society of sufficient means and goods that society produces in order to sustain life and preserve the liberty of all its members.

Lesbian: Women who have their primary affectional and sexual relationships with other women.

Minority: A group that, because of its physical or socio-cultural characteristics, is singled out from others in the society for differential and unequal treatment, and who therefore regard themselves as objects of collective discrimination. In the USA, as defined by EEO-AA legislation, minorities are the “protected classes”: African Americans, women, Hispanics or Latinos, Asian/Pacific Islanders, Native American Indian/Eskimo, the disabled and Vietnam-era veterans.

Oppression: A system of domination involving institutionalized collective (policy and structures) and individual and interpersonal modes of behavior through which one (powerful) group attempts to dominate and control another (weak) group in order to secure political, economic, and/or social-psychological advantages.

Patriarchy: The power of the fathers: a familial-social, ideological, political system in which men by force, direct pressure or through ritual, tradition, law and language, customs, etiquette, education and the division of labor, determine what part women shall, or shall not play, and in which the female is everywhere subsumed under the male.

People of color/Third World people: Political term which attempts to categorize non-whites (i.e. people of color) and citizens of the world's economically developing countries (i.e. Third World) as social groups with special interests. Both terms do not fully describe these two groups, yet they provide a category that is intended to stress the similarities in their oppressed status.

Prejudice: Conscious or unconscious preconceived attitudes and beliefs about members of a particular social group.

Race: A social construct which attributes differences based on skin color and other physical characteristics or "phenotypes."

Racial group: A group that is socially defined on the basis of physical criteria. "In practice, the distinction between a racial and an ethnic group is blurred. . . . Cultural traits are often regarded as genetic and inherited; physical appearance can be culturally changed; and the sensory perception of physical differences is affected by cultural definitions of race. However, the distinction between race and ethnicity remains analytically useful."

Racial-ethnic prejudice: An attitude, an element of common sense, based on false and rigid generalizations of negatively valued properties attributed to racial ethnic groups other than one's own. Common sense notions about racial-ethnic groups enable an understanding in the ordinary flow of daily activities. The dominant common sense about race and ethnicity does not explicitly adhere to a goal of confirming and perpetuating inequality, but neither does it include elaborate notions of opposition against racism (Essed 1996).

Racism: Racism is transmitted through acts generated from a social attitude that takes the legitimacy of the racial ethnic social order for granted. Discrimination includes all acts, verbal, nonverbal and paraverbal, that result in negative or unfavorable consequences for the dominated racial-ethnic groups (Essed 1996).

Paternalistic racism is, for example, the racism practiced by the Dutch against the Indonesians after the second World War where Indonesian immigrants were to be "absorbed." Characteristics of paternalistic racism include:

- benevolent repression:* racial ethnic groups are forced to assimilate;
- no claims for equality:* unequal roles and status of dominant group are not questioned;
- condescending sympathy:* racial-ethnic groups are pictured as childish, uncivilized, ignorant, impulsive, immature; and
- racial-ethnic groups are perceived as having problems:* inferiority complex, poverty, social ignorance.

Competitive racism is, for example, the racism practiced by the Dutch towards the Turks and Moroccans (1960s) and Surinamese (1970s and later). Characteristics of competitive racism include:

- hostile rejection:* racial-ethnic groups are perceived in terms of imaginary or real competition;
- equality claims:* roles and status of dominant group are questioned and contested by the racial-ethnic groups;
- antagonism or hatred:* representation of racial-ethnic groups includes images such as aggressive, intrusive, insolent, oversexed, dirty, inferior, and threatening to the national culture;

racial-ethnic groups are perceived as creating problems and hence, being a problem: they protest against inferior status and they claim equal social access and opportunities.

Sexism: The oppression and/or exploitation of women based on gender.

Social power: The relative access to resources and privileges within a society and its institutions, including the privilege of being ignorant.

Social reproduction: All the various social relations and institutions that serve to reproduce society without any fundamental change.

Sociocultural differences: Differences in ways of seeing, perceiving, being and acting in the world which arise from one's social position. They are cultural because they are an expression of learned ideas and social because they are directly or indirectly carried out in sets of interpersonal and intergroup relations.

Stereotypes: Images and beliefs about a group, which are attributed to all members of that social group irrespective of their individual characteristics and which serve to justify, confine or privilege a particular group of people based on their belonging to that group and not on their individual or personal characteristics, attitudes and skills.

References

Albert et al. (1986); Adler (1983); Essed (1996); E.Y. Cross and Associates (1996); Frye (1983); Holvino (2000a); Ryan (1981); Stout (1996); Van den Berghe (1978); Walker (1979).

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DIFFERENT ROLES AND FUNCTIONS IN AN ORGANIZATIONAL DIVERSITY CHANGE EFFORT**Organizational Leaders**

Role: To develop and articulate an organizational vision for inclusion and diversity and guide the development and implementation of a strategy for change.

Tasks:

- Scope the environment and maintain the relevance of inclusion and diversity for the organization.
- Develop and approve an organizational change strategy for inclusion and diversity.
- Enable the work of specialists and managers throughout the organization in implementing and refining an inclusion and diversity strategy.
- Model and champion inclusion and diversity throughout the organization.
- Attend to and reward inclusion and diversity.
- Respond and set limits.
- Develop and implement criteria for recruitment, selection and performance appraisal consistent with the vision at their level.
- Partner with the diversity council(s), specialists, leaders and other key actors throughout the organization to support and advance the diversity effort and its different initiatives.
- Regularly assess the effectiveness of the diversity strategy.

Structure: Line managers at each of the different levels of the organization including the CEO, COO and his/her direct reports.

Human Resource Professionals and Other Specialists

Role: Serve as a resource to the diversity effort in their area of expertise.

Tasks:

- Partner with diversity specialists, line management, advocates and others to support the diversity strategy with particular attention to their area of expertise.
- Provide information, identify issues and make recommendations to support the diversity effort, especially to managers and dedicated resources.

Structure: Informal and formal partnerships throughout the organization.

Diversity Councils

Role: Provide advice and support to the organizational leaders in developing and implementing a vision and change strategy for inclusion and diversity in the organization.

Tasks:

- Monitor progress of change plans and initiatives.
- Support (and pilot) the education of the organization.
- Voice diversity issues and concerns.

- Partner with consultants, leaders and others in specific initiatives.
- Integrate and communicate efforts and initiatives throughout the organization.

Structure: 15-30 persons functionally, hierarchically and socially representative of the organization.

Advocates and/or Internal Resources

Role: Help shape, lead and support the inclusion and diversity effort and initiatives, paying particular attention to their specific units.

Tasks:

- Work with dedicated resources and leadership to implement the diversity change strategy.
- Voice and communicate relevant inclusion and diversity issues, drawing on information throughout the organization, but specifically in their organization.
- Make recommendations to the leadership and diversity council representatives on diversity strategy.
- Model and teach inclusion and diversity.
- Serve as a resource, initiate and seize opportunities for change, dialogue and learning on diversity.

Structure: Business units line or staff representatives who participate in advanced training and work on a ratio of 1:20 in their organization. Selected for their credibility and commitment to diversity.

Diversity Specialists and other Dedicated Resources

Role: Support, advise and coach leadership on inclusion and diversity issues and on the development and implementation of a sound organizational change strategy for inclusion and diversity.

Tasks:

- Participate in developing and recommending an inclusion and diversity organizational vision, change strategy and initiatives.
- Identify, organize, and oversee the integration of initiatives and resources needed to implement the inclusion and diversity strategy.
- Serve as liaison between the leaders, internal and external resources and other actors involved in the diversity effort throughout the organization.
- Partner with external consultants and other professional resources to plan, implement and assess efforts and initiatives.
- Manage and use internal and external organizational information to support change, monitor progress and make recommendations to the diversity strategy.
- Model inclusive behavior and commitment to the diversity vision and strategy.
- Ensure alignment between local strategies and initiatives and the corporate strategy and vision.
- Provide “state of the art” information to the organization on issues of inclusion and diversity.

Structure: 3-6 corporate specialists working in close collaboration with business unit dedicated resources, other specialists and organizational leaders.

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