CREATING AND SUSTAINING DIVERSITY AND INCLUSION IN ORGANIZATIONS: STRATEGIES AND APPROACHES

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This chapter describes the key elements of diversity initiatives: defining a vision for the desired outcome, understanding the dynamics of change and designing an appropriate strategy, and selecting and combining the most effective interventions and best practices. We review approaches used in organizations to create change toward diversity and inclusion, articulate some of the challenges organizations face as they seek the benefits that diversity, inclusion, justice, and equity can bring, and outline some techniques for meeting those challenges. Visions of inclusion in organizations are described, as are three levels of organizational change (systemic, cultural, and behavioral) and two approaches to change (organization development and collaborative inquiry). The chapter concludes with a discussion of tactics and best practice for successful change.

Organizations in the United States and around the world are paying increased attention to diversity. Diversity is widely regarded as vital for organizations to reach their valued goals. More and more emphasis is placed on the need to leverage multiculturalism and to foster inclusion as a basis for organizational success. For most organizations, the road to multiculturalism is long and hard (Dass and Parker, 1999). Knowledge of how organizations change and evolve can help individuals and teams travel toward multiculturalism with greater assurance of success and the least risk of disappointment.

What can organizations do to obtain the full benefit of all the potential that their people bring to the workplace? How can the vast range of differences among people – all the things that make us both unique and similar to others – function as a source of strength to organizations? What can organizations do to make sure that they are the kinds of places to which people would like to belong and contribute, and where historical patterns of intergroup injustice and inequality are eliminated rather than continually reproduced?

The aim of this chapter is to help students and practitioners who are interested in fostering and sustaining diversity and inclusion in organizations understand the key elements of a diversity initiative, which we submit are the following:

1 Define a vision of the desired outcome: what is a successfully diverse organization?
2 Understand the dynamics of change and design an appropriate strategy: how will this organization move toward its desired future and what type of leadership will be required?
3 Select and combine the most effective interventions and best practices to achieve goals for change toward diversity and inclusion: what activities and steps will bring about change?

The chapter is divided into three sections. The first section articulates a model for increasing multiculturalism within organizations – the vision. The second section outlines three levels of organizational change and differentiates between two related but distinct approaches – the dynamics of change. The third section moves from the conceptual to the concrete in order to discuss tactics for successful change – the best practices.

MODEL OF ORGANIZATIONAL EVOLUTION

Holvino (1998) has developed a framework she terms the Model of Multicultural Organizational Development (MCOD).[1] The MCOD model (see table 12.1) proposes that organizations go through six phases as they move from being *monocultural* (exclusionary organizations in which the values of one group, culture, or style are dominant) to *multicultural* (inclusive organizations in which the perspectives and styles of diverse peoples are valued and contribute to organizational goals and excellence).

In the first *exclusionary* stage, organizations explicitly and actively base themselves on the norms and values of one cultural group and advocate openly for the privileges and dominance of that group. Today, not many public organizations are still at the exclusionary stage. 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 to or closely fit the dominant group. In this

Table 12.1   The multicultural organizational development model

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.	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.	

Source: Holvino (1998). © Chaos Management, Ltd., 1998, used by permission.

stage, organizations operate much like private social clubs, where the norms include passive exclusion and ignoring of differences.

Organizations in the third stage of development, *compliance*, are passively committed to including members of non-dominant groups, but do not make any substantive changes in their management approaches 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 Muslim members where the cultural symbols and celebrations remain Christian.

Organizations become actively committed to including members of non-dominant groups, making special efforts to attract non-dominant group members and tolerating the differences they bring, in the *positive action* stage. However, the subtle ways in which the norms, structures, and methods of working still favor those in the dominant group make it hard for others who are different to feel that

they can contribute and advance in the organization. Although there is tolerance and targeted use of differences, not enough cultural and structural change has occurred to provide equal opportunities for all. At this stage there may be a critical mass of non-dominant group members who help to question and change some existing practices. The imbalances that occur during the positive action stage often lead organizations to move toward more inclusion or retreat to an earlier stage.

In the *redefining* stage, organizations actively try to include all differences and to remove 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 dominant and non-dominant groups are still learning to deal with differences and diversity.

In the *multicultural* or inclusive and diverse stage – an ideal stage in the development process – organizations seek and value all differences and develop the systems and work practices that support members of every group to succeed and fully contribute. Inclusion in multicultural organizations means that there is equality, justice, and full participation at both the group and individual levels, so that members of different groups not only have equal access to opportunities, decision-making, and positions of power, but also are actively sought out *because* of their differences. In a multicultural, inclusive organization, differences of all types become integrated into the fabric of the business, such that they become a necessary part of doing its everyday work.

Visions of multicultural organizations

The vision of a diverse and fully multicultural organization embedded in Holvino's MCOD model is similar to other visions described 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 among employees from both dominant and non-dominant groups. For Miller and Katz (1995), in multicultural, inclusive organizations, diversity is seen as "a fundamental enhancement" and a "wide range of values and norms are . . . connected to . . . [the organization's] values, mission and goals" (p. 278).

Most visions of multicultural organizations focus on inclusion as a key aspect of leveraging diversity (Davidson and Ferdman, 2001; Ferdman and Davidson, 2002). We see inclusion as a feature of good management in any organization; unfortunately, it has typically been less evident in the context of most diverse organizations, particularly for those who are also members of historically subordinated groups. Inclusion is fundamental for incorporating equality and truly sharing power across a range of groups and their members.

Mor-Barak and Cherin (1998: 47) describe inclusion in diverse organizations as "the degree to which individuals feel part of critical organizational processes," which is indicated by how much access they have to information and resources, how involved they are in their work group, and how much they can influence decision-making. Gasorek (2000) describes inclusion at Dun and Bradstreet in the context of a diversity initiative and considers the degree to which (a) employees are valued and their ideas are taken into account and used, (b) people partner successfully within and across departments, (c) current employees feel that they belong and prospective employees are attracted to the organization, (d) people feel connected to each other and to the organization and its goals, and (e) the organization continuously fosters flexibility and choice and attends to diversity.

Wheeler (1999: 33–4) provides a succinct summary of the components of inclusion at the organizational level: "organizations that truly value inclusion are characterized by effective management of people who are different, ability to admit weakness and mistakes, heterogeneity at all levels, empowerment of people, recognition and utilization of people's skills and abilities, an environment that fosters learning and exchanging of ideas, and flexibility." Similarly, Thomas and Ely (1996) describe a learning and effectiveness paradigm that predominates in multicultural organizations that are able to connect members' contributions and perspectives to the principal work of the organization, allowing them to "enhance work by rethinking primary tasks and redefining markets, products, strategies, missions, business practices, and even cultures" (p. 85). In this type of organization there is equal opportunity for all, differences and their value are recognized, and most importantly, the organization is able to "internalize differences among employees so that it learns and grows because of them. Indeed . . . members of the organization can say, We are all on the same team, *with* our differences – not despite them" (p. 86).

In essence, we define a multicultural, inclusive organization as one in which the diversity of knowledge and perspectives that members of 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. Furthermore, in multicultural, inclusive organizations, members of all groups are treated fairly, feel included and actually are included, have equal opportunities, and are represented at all organizational levels and functions. The ultimate goal in working with diversity is to weave it into the fabric of the organization. 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 managers and leaders. It suggests that diversity is an asset to be used and developed, rather than a problem to be managed. Finally, it projects a sense of dynamism and continuity.

Thus, it is important to understand diversity as more than just a human resource strategy or an approach for managing the workforce. Instead, diversity permeates all the work of an organization and requires a comprehensive effort to change at the organizational level as well as internalization by members of the organization. As Miller and Katz (2002) point out, if such an effort is to be successful it ultimately requires making diversity a new way of doing business, as well as a way of life for the organization and its people. In our view this entails a commitment to addressing and redressing historical inequities and power imbalances (Foldy, 1999; Litvin, 2000) and discovering new ways of collaborating across difference that, in a sense, "work" for everyone (see, for example, Ely and Meyerson, 2000; Fletcher, 2002). This is what we call *working with* diversity.

LEVELS OF CHANGE

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: organizational behavior, organization development, and sociological and feminist disciplines. Considerable differences exist in several areas, including the vision of a successful and diverse organization, the degree and type of change required to accomplish diversity, the levels of the system on which to focus (individual, group, organizational, societal), how to measure change and success, and the kind of change required – long or short term, radical or evolutionary. Yet, in spite of the many differences and the range of recommended strategies and activities, organizational theorists agree that changes can be conceptualized as occurring at three levels of analysis.

Diversity initiatives must address these three different levels of organizational change: structural change, cultural change, and behavioral change (Ragins, 1995). Structural, cultural, and behavioral changes are synergistic: they interact and build on each other. Each level of change becomes a key leverage point 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, but if the culture of an organization does not support the advancement of women and individual managers behave in non-supportive ways, gender equity will not be achieved (Acker, 1990; Kolb et al., 1998; Merrill-Sands, 1998; Meyerson and Fletcher, 2000; Thomas and Ely, 1996). Although the levels of change are interrelated in a complex and mutually reinforcing manner, we identify below the scope and examples of specific interventions that are representative of each. One of the key challenges of a diversity initiative is to have the right mix of synergistic interventions that will maximize change.

Structural change

Structural interventions focus on the formal systems that guide and control the work of the organization. These interventions target policies, practices, and structures that support or hinder the goals of diversity, such as recruitment practices, equal pay and benefits, policies on work–family balance, and the achievement of proportional heterogeneity in positions across rank, departments, and specializations.

Cox (1994) 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 stereotyping and prejudice, provide important role models for the incorporation of other groups, and diminish the dynamics of tokenism that often reduce the effectiveness of employees from non-dominant groups.[2]

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 makeup, changing the weight of the interview in the selection process, and reviewing jobs and job descriptions to focus on requirements as opposed to style preferences. Nevertheless, structural integration is not a sufficient component for achieving equity and inclusion, and when mishandled through practices such as rigid quotas and non-standard procedures, it may harm more than benefit a diversity initiative.

Other formal procedures that act as barriers to the inclusion, advancement, and effectiveness of employees across lines of difference must also be changed. For example, flexible work schedules, part-time scheduling, compressed work weeks, 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 (see Lobel, 1999). This is not an exhaustive list. Other examples of important policies that should be reviewed or implemented are pay equity, benefits for domestic partners of gay and lesbian workers, and employee support programs that address the special needs of employees and enhance the quality of life in the workplace, such as counseling services and health and exercise clinics. Miller and Katz (2002) urge organizations to truly create and sustain inclusion by developing "new baselines" in policies and practices that go much further than in the past to support people from a wide range of groups.

Cultural change

Cultural change concerns the basic assumptions, values, beliefs, and ideologies that define an organization's view of itself, its effectiveness, and its environment. Organizational cultures, in large part, consist of the informal norms, or *mental models*, that support or hinder diversity and that have differential impact on different groups in the organization. Senge et al. (1994) describe mental models as deeply ingrained "images [and] assumptions . . . which we carry in our minds of ourselves, other people, institutions . . . Like a pane of glass, framing and subtly distorting our vision, mental models determine what we see . . . [They] also shape how we act . . . Because mental models are usually tacit, existing below the level of awareness, they are often untested and unexamined" (pp. 235–6). This is what makes them particularly hard to transform.

Changing the culture of an organization in order to value diversity and difference and to redress power imbalances is thus one of the most difficult parts of 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" (Ragins, 1995: 92). 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 their major traits, such as a power culture, a role culture, a support culture, and an achievement culture (Harrison and Stokes, 1992). Changes are then prescribed accordingly, depending on the strengths and weaknesses of the organizational culture identified. Education and training interventions may also be made with the aim of *changing* the culture of an organization, but it is important to understand that training interventions do *not* change organizational culture. We believe the best way to change organizational culture is to identify the informal practices and beliefs that make up that culture, to analyze their consequences (especially in terms of their impact on different groups of employees), and then to introduce small experiments designed to change everyday practices (Kolb and Merrill-Sands, 1999; Merrill-Sands, Fletcher, and Acosta, 1999; Meyerson and Fletcher, 2000; Rao, Stuart, and Kelleher, 1999).

Cultural audits are a good way of understanding and changing the assumptions and norms that predominate in an organization. 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 opportunities of members of different groups. Cultural audits may include 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 physical layout, and jointly exploring their meaning and impact on organizational climate and effectiveness (Chung, 1997).[3]

Other interventions that support organizational culture change include sanctioned affinity, support, or interest groups and alliances, which meet to share problems and solutions, learn the organizational norms, and develop supportive relations and change strategies (see chapter 10 for a discussion of GLB affinity groups); 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 (Chesler, 1994; Jackson and Holvino, 1988).

Behavioral change

Behavioral change interventions seek changes in behaviors, attitudes, and perceptions within and between individuals, and within and between work groups, that support or hinder the goals of diversity. Targeted behaviors can range from the hostile to the thoughtless. Even without intending to do so, majority group members can negatively affect minority group members. Language use and humor, for example, can denote stereotyping and negative intergroup attitudes. 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 co-workers, inequitable delegation of tasks, and exclusion from informal social networks and peer support (Cole and Singer, 1991; Ragins, 1995).

A common intervention to address individual and interpersonal behavior is education and training (see panel 12.1). Although many organizations and consultants equate diversity with training programs, we wish 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 by itself cannot change organizational culture, except indirectly when a critical mass of people go through intense and successful training programs and become internal change agents (see Ferdman and Brody, 1996).

Ellis and Sonnenfeld (1994) identify some of the advantages of diversity 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 co-workers, and sending a message that diversity is an important initiative throughout the organization. On the other hand, ill-designed and inappropriately conducted

12.1   *Training: A rich and focused intervention*

There are many options for implementing training and education programs to support a diversity initiative (Ferdman and Brody, 1996). Some authors and consultants define education as a general approach to developing 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 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 choices must be made between training that is off-the-shelf or customized, internally delivered or delivered by external consultants, offsite or on-the-job, short or long duration, stretched over a period of time or one-time, phased into a sequence of programs, and voluntary or mandatory.

Discussion questions

1 In what kinds of training have you participated? What made these training experiences successful (or unsuccessful)? What lessons can you draw for diversity training?
2 In what ways might diversity training be similar to other types of training in organizations? How is it different? What implications do these similarities and differences have for the design and delivery of diversity training?
3 Discuss the pros and cons of participating in diversity training with the same people as are in your workgroup (as opposed to participating with people with whom you do not work every day).
4 What are some of the topics and issues that you believe could or should be addressed in diversity training? Why?

training may do considerable harm to diversity efforts. For example, it can create additional stereotypes if the content is too simplistic, or it can alienate dominant groups if the process of training is believed to favor some groups at the expense of others. Training interventions can also backfire if they are delivered as one-shot events without appropriate follow-up or reinforcement (Grace, 1994).

Other important interventions to change behaviors for increased diversity and inclusion are coaching and multicultural team-building. Coaching provides one-on-one support to managers, especially at senior levels, to help them identify areas that need development and to encourage them to take action. Multicultural team-building enhances the effectiveness of working teams by developing skills in managing cultural and other social differences that may impact tasks, the roles members play, their relationships, and the methods and procedures used to accomplish their work. One important note of caution is that behavioral change interventions can rely too much on "fixing the people" or "equipping the minorities" while ignoring the systemic structural and cultural factors that influence individual and group behavior (Kolb et al., 1998; Smith, Simmons, and Thames, 1989).

Effective diversity efforts require a multi-level approach that includes structural, cultural, and behavioral change and a variety of specific interventions that reinforce and augment each other. Morrison (1996) summarized the ten most

important diversity interventions identified in her benchmarking research with corporations in the United States. We list them 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;
* career development and advancement.

APPROACHES TO CHANGE

This section describes two major approaches to organizational change: the organization development approach and the collaborative inquiry approach. Although similar, the two approaches differ in certain particulars.

Organization development approach

The organization development (OD) approach to diversity is an integrated, planned, system-wide, and long-term process of change. Holvino's MCOD model (see above) is an example of an OD approach to diversity (Chesler, 1994; Jackson and Holvino, 1988; Katz and Miller, 1988; Miller and Katz, 1995). OD 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.

The OD 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 MCOD model (see table 12.1) provides a useful way for an organization to frame an initial diagnosis and vision of diversity.

Processes and sequence of change

Although 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 OD approach (Arredondo, 1996; Cox, 2001; Cross, 2000; Jackson and Hardiman, 1994; Katz and Miller, 1988; Loden, 1996; Miller, 1998; Miller and Katz, 2002; Thomas, 1992):

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.
5. Monitoring and evaluating progress and results.

It is important to note that even though these steps appear to be linear, this is actually a cyclical process in which the last step informs prior work. Because diversity is so complex it is recommended – especially in its initial stages – that the plan remain open and flexible until data gathering, learning, and needs assessment have taken place to better inform the initial decisions. For example, the concept of diversity is usually unclear in the beginning. During data collection a great deal of learning takes place about the barriers to diversity and inclusion, the specific meaning of these concepts in the context of the organization, and the vision of inclusion and diversity that will galvanize members to work towards and embrace the change effort.

Preparing for an initiative (step 1) involves creating the foundation for the change process, including securing leadership support and involvement and developing an initial plan of action. The most important elements at this stage are to communicate the intent of the initiative, allocate resources, assign responsibilities, and frame the initial tasks, as well as to ensure that the initiative responds to strategic organizational imperatives for diversity (see, for example, Robinson and Dechant, 1997; Wheeler, 1995). Miller and Katz (2002) highlight the importance of beginning to create a belief in the organization that new ways of working together inclusively are actually possible, and of identifying points of leverage so that actions taken have maximal payoff.

Once the intent of a diversity initiative has been identified, data need to be gathered in order to assess needs related to diversity (step 2). Cultural audits (e.g., Cox, 2001; Potts, 1996), employee surveys, and focus groups are typical ways in which consultants help organizations gather information about which aspects of diversity should be explored, given the strategic imperative. The consultant analyzes the data and makes recommendations, which are then fed back to key members of the organization for action (see, for example, Cox, 2001; Potts, 2000). The purpose of the analysis and feedback process is to connect interrelated themes into a meaningful picture that suggests important areas of need and goals for change. Strengths as well as limitations should be identified and categorized under some broad areas of change.

The MCOD model helps define the diversity change goal by providing a framework to interpret the data 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 to determine the level of current multiculturalism. For example, it is important to consider how the mission, culture, language, informal systems, policies, structures, leadership, and reward systems support (or do not support) an inclusive and diverse organization for women; for members of racial, ethnic, language, or religious minorities; for gays, lesbians, bisexuals, and transgendered people; for people with disabilities; for members of poor and working socioeconomic classes; and for members of other subordinated social groups (Davidson and Ferdman, 2002). Because it is not usually possible to identify all issues or all identity groups at the early stages of an initiative, it is vitally important to design the change effort so as to be able to respond to new demands and to expand the agenda for change. As the critical mass of internal and external change agents increases, gradually incorporating the needs and perspectives of new stakeholders may help to reduce the resistance of those who feel that they may not benefit from the change effort. In any case, attending to this resistance and finding ways to be inclusive of members of dominant groups who are willing to participate as champions of the initiative are often key aspects of successful change efforts (see, for example, Cross, 2000; Nash, 2000).

Developing a strategic plan is the third step. 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 ensure that appropriate steps are taken to maintain those changes. It includes definitions of end objectives, outlines of specific actions designed to produce the desired outcomes, time frames, and a monitoring and evaluation system. A strategy must specify the priority goals, primary interventions, and sequence of activities, resources, and responsibilities. It also needs to take into consideration the power dynamics and the culture of the organization, as well as the processes involved in implementing organizational innovations (Loden, 1996).

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 change 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."

Part of the strategic plan (though this may also be an additional phase in the process) must include a vision and a definition of diversity and inclusion that are specific to the organization. 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. Many times, the vision and definition of diversity and inclusion are generated too early in the process and are vague or incomplete, and can then become easy targets of criticism. We recommend that organizations do not attempt to develop a final diversity vision before assessing needs and collecting information and examples through educational and benchmarking activities. Paradoxically, some type of vision is also necessary at the earliest stages, to begin and help pull the process of change in the first place. The problem comes when that vision is not modified or enhanced on the basis of the needs assessment and the strategic planning process. 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 workforce (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. (**Howard, 1990: 135, quoted in Kossek and Lobel, 1996: 10**)

Roosevelt Thomas (Thomas and Woodruff, 1999) suggests that strategic plans in diversity-mature organizations have the following characteristics: (a) they derive from compelling and strategic motives; (b) they identify the diversity-related issues that must be addressed in response to an organizational assessment; and (c) they delineate a clear sequence in which the tasks must be implemented. Dass and Parker (1999) distinguish among episodic, freestanding, and systemic approaches to diversity initiatives, with the latter being more likely when the pressures for diversity are high and the priority for working with diversity is seen as having strategic importance. Organizations adopting systemic approaches integrate the various components of their diversity initiatives with each other and into a larger strategic framework.

As with any other organizational action plan, the key questions in the implementation step (step 4) are: Who? What? When? For whom and with whom? and Where? A variety of options are available to address these questions. For example, in answer to the "Who?" question, 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 types 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 hierarchical levels and functional units these various components will take place, are the essence of the implementation plan. Many

decisions must be made and a multicultural development model such as Holvino's can help guide these decisions.

Regardless of the specifics, the key enablers of a strategic plan are communication, credibility, and accountability (Arredondo, 1996). 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 (Meyerson and Scully, 1999; Senge, 1990).

Monitoring and evaluating the diversity plan (step 5) is an important component of a diversity initiative. By monitoring, we mean making 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 regarding the scope of the evaluation, the information that will be sought from the evaluation process, how and for whom information will be gathered, the use of the data, and to whom and how it will be fed back (Comer and Soliman, 1996; Digh, 1998; Martineau and Preskill, 2002; McEnrue, 1993; Stephenson and Krebs, 1993). When goals and expected outcomes have been made clear during the initial planning process and data have been collected that can serve as a baseline to assess change over time, the evaluation process 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 members of previously underrepresented 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 MCOD model. In comprehensive long-term initiatives, other areas to evaluate – addressing outcomes of the intervention as well as effective implementation of the interventions – 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) changes in costs and in profitability; and (e) the level of satisfaction of members of different groups in the organization (see panel 12.2). Specific evaluation methods that can be used include program evaluations, such as evaluation of training or career development programs; organizational surveys to assess workplace climate; benchmarking with other organizations for comparison purposes; surveys of

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12.2   *Evaluating diversity through employee surveys, not numbers of employees*

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 into two areas: (1) employee assessment of a positive working climate and (2) assessment of increased organizational performance. New questions to be explored are:

- Do all employees consider systems of performance appraisals, rewards, and promotions to be fair and unbiased?
- Do all employees have access to important information that enables them to do their jobs and contribute?
- Do all employees have the ability to influence decision-making?
- Do all employees perceive that they have opportunities to acquire and develop new skills and advance their careers?
- Do all 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?

Often, appropriate items can be incorporated into an organization's regular employee survey. It is important to collect data for different groups of employees so as to determine the impact of changes on a range of employees, especially those who are different from the majority. In this way, well-constructed surveys that take diversity into account can play an important role in monitoring and evaluating an ongoing diversity initiative. Falletta and Combs (2002) point out that when surveys are used as part of an organization development effort, they should be grounded in systems theory, model driven, action research oriented, and viewed as a tool for change planning.

Discussion questions

1   What impact do you think including questions about diversity and inclusion on regular employee surveys might have on an organization and its members? Why?
2   What criteria or indicators could be used in your school or work environment to assess diversity and inclusion? How are these tied to particular goals or objectives with regard to changes in the organization?

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.

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.

Strengths and limitations of the organization development approach

The OD approach to diversity has some key strengths. 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 it involves a logical and deliberate pace of change that promotes a certain amount of organizational security amidst a process that can be experienced as potentially threatening.

However, success in implementing OD approaches to diversity also requires considering how their application differs from more traditional OD change efforts (Chesler, 1994; Chesler and Delgado, 1987; Jackson and Hardiman, 1994; Prasad et al., 1997). For example, Chesler points out that MCOD, because of its equity goal, needs to pay more attention to the role of conflict, intergroup dynamics, coalition and alliance building, and power and resistance issues within the context of change than do other OD interventions.

Some of the limitations to the OD 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 of which are common interventions in the OD approach – as a way of changing the organizational culture. Moreover, the effort should not be viewed as simply a human resource initiative, because this removes the managers and other staff from their responsibility to provide leadership. Indeed, Dass and Parker (1999) point out that a distinguishing feature of systemic diversity initiatives is that responsibility for them typically lies with line managers.

Panel 12.3 provides an example of an OD approach to diversity (see also White, 1996). OD 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, to which we turn in the next section, offer an alternative that may work best under a different set of organizational conditions (Bunker and Alban, 1997; Chesler, 1994; Holvino, 1993).

12.3   *An example of an organization development approach to diversity: MOBA manufacturing*

The initiative started with a request from the CEO of MOBA manufacturing, a multinational corporation, via his human resource manager, to engage in "diversity management." After initial conversations with members of the top management team, the plan of action summarized here 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 group results and preparation of a report with recommendations by an external diversity consulting firm; (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) an intervention 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.

Discussion questions

1 What suggestions do you have for how MOBA manufacturing might go about assessing the effectiveness of its diversity initiatives?
2 What components would you recommend including in a diversity initiative in your organization? Why?

Collaborative inquiry approaches to diversity

Collaborative inquiry approaches are usually more fluid than traditional OD approaches to diversity. We explore three examples of collaborative inquiry approaches: action research, appreciative inquiry, and future search conferences. Although some authors (e.g., Waclawski and Church, 2002) see these as also falling under the rubric of OD, we distinguish them to emphasize the somewhat different orientation adopted by those using these methods with regard to the degree and type of collaboration with the organization and its members, the flexibility of the change process and the roles of internal v. external change agents, and the orientation to change. Specifically, external consultants who practice collaborative inquiry approaches emphasize a high degree of partnership with the client organization and its members, with concomitant involvement of the latter in all phases of planning and implementation of the diversity initiative. In so doing, practitioners of collaborative inquiry seek to approach new situations without many preconceived models, and are prepared to generate new frameworks and new strategies as needed. Finally, those adopting collaborative inquiry approaches, in contrast to those focusing on the more traditional OD methods described earlier, are more likely to see change as constant. (For more details on collaborative inquiry, see Rapoport et al., 2002.)

Action research is a collaborative inquiry approach to organizational change that focuses on joint learning between internal and external change agents (Greenwood and Levin, 1998; Rapoport, 1970; Whyte, Greenwood, and Lazes, 1991). 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."

Action research usually proceeds with the following seven phases (Greenwood and Levin, 1998; Merrill-Sands, Fletcher, and Acosta, 1999; Merrill-Sands, Fletcher, Acosta, Andrews, and Harvey, 1999; Whyte, Greenwood, and Lazes, 1991):

1 *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.
2 *Data collection and inquiry:* information is collected through interviews, focus groups, surveys, and other mechanisms.
3 *Analysis:* the data are assembled, summarized, and organized according to identifiable patterns.
4 *Feedback and action planning:* the analysis of the data is shared with members of the organization to develop a joint interpretation, identify change goals, and develop action plans.
5 *Implementation and experimentation:* actions agreed upon are implemented and organizational experiments to support the change goals are conducted.
6 *Monitoring and evaluation:* data are collected to assess the impact of the change initiatives and experiments.
7 *Learning, adaptation, and further experimentation:* the process is repeated, as needed. Eventually, it becomes a normal part of the organization's processes.

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 the idea 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 than on the OD methods described earlier, Cumming and Holvino (1997) provide a concrete example from the practice of collaborative action research with a multicultural board development intervention (see panel 12.4).

Because collaborative approaches to change are more fluid and are planned in distinct cycles of inquiry, analysis, and implementation, Holvino (2000) suggests that an action research approach to diversity may be more appropriate than long-term and more traditional OD 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 scarce, and where changes in the external environment – such as donors' priorities or national politics – are unpredictable or frequent.

Large group collaborative interventions for organizational change, such as future search conferences (Weisbord, 1992; Weisbord and Janoff, 2000) and appreciative inquiry methodology (Bunker, 1990; Cooperrider, 1990; Cooperrider and Srivasta, 1987; Elliott, 1999; Fitzgerald, Murrell, and Newman, 2002; Hammond, 1996), 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.[4]

12.4   BEC: *An example of collaborative inquiry with a social change organization*

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 US city. A multicultural board made up of representatives of the key groups in the community and an executive director, a White bilingual man, manage the affairs of the organization with a skeleton staff of part-timers and community volunteers.

The 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 for 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/fundraising 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 5–6 issues instead of every two months with 10–12 issues.
- Experienced board members began mentoring new board members on key issues affecting the community.

Discussion questions

1   What similarities and differences do you see in the approaches taken at BEC and that taken at MOBA manufacturing (panel 12.3)? How might one reasonably combine the two approaches?
2   What can your organization and its members do to work more effectively with and learn from your differences?
3   Based on your reading so far, what aspects of the work groups that you belong to might benefit from a collaborative inquiry such as that described here? Why?

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A future search conference is a three-day large group event that helps the various stakeholders of an organization create a shared vision of the future and generate action steps for accomplishing it. Typically, 60–70 participants – representative of the whole system – gather in one room and engage in a highly structured set of activities to explore their past and common history, identify the conditions that are impacting them in the present, and develop scenarios for the desired future. The meeting enables all stakeholders to discover shared intentions and common ground on 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 (AI) has also led to some notable successes in organizations seeking to better capitalize on staff diversity (see panel 12.5). The appreciative inquiry process consists of a four-part cycle: discovery, dreaming, design, and delivery (Elliott, 1999; Hammond 1996; Hammond and Royal, 1998). 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 stories, it can

12.5   *From sexual harassment to best cross-gender relations:*
An appreciative inquiry case

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 a 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, building trust, 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 thirty 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 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 as the best company in the country for women to work.

Discussion questions

1 Think of a situation in which you have participated in a high-quality and productive cross-gender work relationship. What were its key features? What allowed the partnership to succeed? What lessons can you draw from that experience for future cross-gender collaborations?
2 Why do you think that this intervention had the results that it did?
3 Based on your reading, experience, and observation, what do you think can be done to improve the experience and results of cross-gender work partnerships? What can/should organizations do in this regard? What can/should you do?

This intervention was designed and facilitated by Marge Schiller and Marcia Worthing; from Holman and Devane (1999: 250–1).

create a new image of itself based on the qualities it has manifested in its moments of excellence.

Some of the resulting action steps to put the "dream" – as it is referred to in AI – into 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 AI 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 AI 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 (Bushe, in press; Elliott, 1999). AI proponents argue that this approach does not generate the defensiveness that typically comes with traditional organization development diversity change interventions because, rather than asking people to change what they have been doing wrong, it encourages them to do more of what they have already been doing right.

Strengths and limitations of collaborative inquiry approaches to diversity

The action research and other collaborative inquiry approaches to diversity have some key strengths. These approaches involve many stakeholders in the stages of the change effort, thus generating energy and commitment throughout the whole system. They develop internal capacity by increasing the knowledge and skills of internal change agents. They promote organizational dialogues, which help to identify and illuminate deep norms affecting equity and effectiveness and the practices that reinforce them. Furthermore, collaborative inquiry approaches generate less resistance than top-down approaches because they tend to involve those likely to be affected by the changes as integral participants in the process, and they provide access to important information rapidly. Finally, such approaches integrate the expertise of internal and external change agents.

The collaborative inquiry approaches also have some limitations. First, it may be difficult to get leadership commitment and resources because specific outcomes are not predictable or set at the beginning of the initiative. Second, the participatory process may generate too many agenda items and create unrealistic expectations about change throughout the organization. Third, the unbounded nature of the process requires ongoing negotiation. Fourth, the external researchers' lack of grounding in the culture of the organization and their lack of an established long-term relationship with the organization and its leaders may hinder the continuing viability of the initiative.

TACTICAL CONSIDERATIONS IN DIVERSITY INITIATIVES

For each of the levels of change and for either approach to change, there exists a wide range of specific interventions or activities that can be applied. Many

interventions, such as mentoring, impact more than one level of change. 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 (1999b), a non-profit research organization focusing on gender issues in corporations, found that the single greatest barrier to advancement as reported by women of color in the United States was the lack of mentors. The importance of mentoring for individual advancement, effectiveness, and well-being is well established (see, for example, Murrell, Crosby, and Ely, 1999; Ragins, 1999).

In addition, different interventions are more appropriate for different stages of multicultural OD. 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 underrepresented 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 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.

Although 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 (Merrill-Sands, Fletcher, and Acosta, 1999; Meyerson and Fletcher, 2000).

Maximizing impact

To maximize the impact of a diversity change effort, it is important to involve and deploy both external and internal change agents in the selection and implementation of specific interventions, because 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. This person (or team of people) 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.

Unfortunately, it is often 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. However, large organizational change efforts require the support of external change agents who bring an outsider's 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.

Common diversity "traps"

Various authors (e.g., Katz and Miller, 1988; Kirkham, 1992; Thomas and Woodruff, 1999) have identified – from experience and from practice – common mistakes to avoid in trying to bring about diversity change, especially in the context of US-based organizations and their international affiliates. Based on their work and our own, some of these "traps" 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 good intentions, usually contained in verbal expressions of support of diversity, and the impact of specific institutional actions that go against diversity;
- not building coalitions and support with different stakeholders who 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.

Helpful conditions

For diversity initiatives to accomplish the goals of maximizing both inclusion and performance, it is important to have a number of conditions in place. On the basis of the literature (e.g., Arredondo, 1996; Cox, 2001; Ferdman and Brody, 1996; Hayles and Russell, 1997; Kotter, 1995b; Loden, 1996; Merrill-Sands, 1998; Miller and Katz, 2002) and our own experience we have identified 13 tactics that promote successful diversity initiatives:

1 Work from an inclusive definition of diversity that goes beyond race and gender issues to include other dimensions of difference.
2 Develop a strategic vision and plan with clear objectives, focus, and appropriate financial and human resources to support it. Communicate the plan widely.
3 Align the initiative to the core work of the organization and its strategic goals; connect it to a clear statement of needs that conveys the urgency and benefits the organization will derive from embracing change.
4 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.
5 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.
6 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.
7 Build the change strategy from a solid analysis of diversity issues in the organization. Develop the analysis from multiple perspectives throughout the organization.
8 Provide freedom to pilot and experiment. Encourage an environment of learning from experience where flawless implementation is not expected.
9 Convey the importance of engaging in a dynamic and systemic process, not a static program or a single "quick-fix" solution.
10 Encourage an open climate that allows for the expression of passion, compassion, and forgiveness throughout the change and learning process.
11 Assign accountability across all levels and types of employees, including senior management.

12 Ensure the competence of consultants and other resources in designing and facilitating relevant initiatives aligned to the organizational culture and strategic imperatives.
13 Recognize, celebrate, and connect "small wins" so as to aggregate small changes into a larger change process with more impact (Meyerson and Fletcher, 2000; Weick, 1984).

Tips for international organizations

Based on our experience of initiating, designing, and implementing diversity change efforts in international contexts, we add the following tips for working with diversity across national boundaries and outside the United States:

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 on an ongoing 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.
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. Nurture and provide the opportunity for these partnerships to become role models of successful cross-mentoring and multicultural teamwork.
3 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 to government agencies with regard to anti-discrimination laws should not be taken as a reason for "not taking action" by international organizations initiating diversity efforts.

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. Panel 12.6 provides an example of indicators of diversity progress that can be adapted to specific organizational and national realities.

12.6　*Indicators of progress in effectively managing diversity*

An organization is working creatively with diversity when the following apply:

- 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 and 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 tapped 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 organizations.

Discussion questions

1　What do you think about the list of indicators of progress listed here? Why? How applicable might these be to your organization? Why?
2　What additional (or alternative) indicators of effective diversity management can you list?
3　How do the indicators in the panel and the ones you listed connect to particular goals and objectives regarding diversity and inclusion?
4　What benefits do you believe would accrue to organizations that display these characteristics?

Revised and adapted from Laura Moorhead, Joppa Consulting, 1999.

CONCLUSION

As we hope this chapter has shown, the steps that organizations and their leaders must take to create and sustain diversity and inclusion are demanding and challenging; to be effective, they require a substantial degree of planning, resources, and commitment. The path to multiculturalism is not one on which organizations should embark simply because other organizations are doing it or because it seems trendy. Yet, for many if not most of today's organizations, future success and in many cases even survival, will depend on what they begin to do now to make sure that they use their diversity as a source of strength, and that they seek inclusion and justice in their everyday ways of working. We believe that, ultimately, this is a rewarding and highly worthwhile path that most organizations will find ample reason to take.

Notes

1　This model is similar to those developed by Adler (2002), Cox (1991), Jackson and Holvino (1988), Katz and Miller, (1988), and Kolb et al. (1998). Also, work by such authors as Ferdman (1997), Palmer (1994), R. Thomas (1990), and Thomas and Ely (1996) on paradigms of diversity such as affirmative action, fairness, valuing differences, and managing diversity, imply that different perspectives and visions of diversity guide the process of organizational change.
2　Kanter (1977) explored four key dynamics of tokenism that occur when minority members are 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).

3   For example, 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 racioethnic minorities.

4   Stakeholders refer to actors or parties who have some involvement or interest in the outcomes or business of an organization. Weisbord and Janoff (2000) 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.

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