

## Part One

# Frameworks for Understanding Inclusion

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## CHAPTER ONE

# The Practice of Inclusion in Diverse Organizations

## Toward a Systemic and Inclusive Framework

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In the last twenty years or so, organizations have considerably expanded attention to diversity at work; this has been accompanied by growth not only in the number and range of diversity practitioners, but also in the interest in diversity shown by organizational and other psychologists, by specialists in organizational behavior and human resources, and by other scholars, researchers, and practitioners. What is the role of diversity at work? How can organizations and their leaders best manage and leverage the range of differences in the workforce in ways that lead to positive outcomes for the organizations, their members, and other stakeholders? What conditions can maximize the benefits of diversity? These and similar questions permeate both practitioner and academic discussions on diversity.

Research and practice suggest that *diversity*—the representation of multiple identity groups and their cultures in a particular organization or workgroup—by itself may not necessarily result in positive benefits without the presence of additional conditions. *Inclusion* has emerged as a core concept in relation to diversity; in particular, it is now considered by diversity practitioners as a key approach to benefit from diversity (see Ferdman & Deane, Preface) and is in many ways at the forefront of contemporary

diversity practice. Yet how inclusion relates to diversity, what inclusion is, and how it operates are not always clear or precisely specified. In this chapter, after briefly discussing its relationship to diversity, I develop the concept of *inclusion* and its various facets, as well as its manifestation in individual and collective behavior and in organizational practices.

Inclusion involves how well organizations and their members fully connect with, engage, and utilize people across all types of differences. In this chapter, I argue that the core of inclusion is how people experience it—the psychological *experience of inclusion*, operating at the individual level (and often collectively as well). This experience of inclusion is facilitated and made possible by the behavior of those in contact with the individual (such as coworkers and supervisors), by the individual's own attitudes and behavior, and by the values, norms, practices, and processes that operate in the individual's organizational and societal context. Thus inclusion can involve each and all of the following: an individual or group experience; a set of behaviors; an approach to leadership; a set of collective norms and practices; or a personal, group, organizational, or social value.

The terms *diversity* and *inclusion* are now often used together and inextricably bound—as in “diversity and inclusion (D&I) practice” (for example, Hays-Thomas & Bendick, 2013), “Office of Diversity & Inclusion” (for example, <http://www.opm.gov/policy-data-oversight/diversity-and-inclusion>), or “chief diversity and inclusion officer”; indeed, one can often see *D&I* used as a singular noun. In many ways, diversity and inclusion are now often treated almost like two sides of the same coin. Yet in spite of (or perhaps because of) this usage, the distinctions and relationships between them are not always sufficiently specified. Related to this, there has been a great deal of work focusing on diversity, but much less on inclusion. Because there is a growing area of professional practice in organizations commonly referred to as diversity and inclusion (or D&I), more conceptual and practical clarity regarding what *inclusion* means and how it can be cultivated in diverse organizations and groups will be helpful not only in providing more coherence to this growing field, but also in establishing a foundation for

more effective practice and a basis for empirically testing its assumptions.

## **Inclusion as the Key to Diversity's Benefits**

What is the connection of diversity and inclusion? Why are they tied so closely together? To varying degrees, diversity is a fact of life in work groups and organizations. Inclusion is grounded in what we do with that diversity when we value and appreciate people *because of* and not in spite of their differences, as well as their similarities. More important, it involves creating work contexts in which people are valued and appreciated as themselves and as integrated and complex—with their full range of differences and similarities from and with each other. Essentially, inclusion is a way of working with diversity: it is the process and practice through which groups and organizations can reap the benefits of their diversity.

### **Diversity at Work**

What makes diversity so important? On the one hand, much of the focus in the field of diversity in organizations has been on reducing or eliminating undesirable, unfair, and illegal bias and discrimination and on increasing equity and social justice (Ferdman & Sagiv, 2012). On the other hand, many theorists, researchers, and practitioners (for example, Davidson, 2011; Ely & Thomas, 2001; Ferdman & Brody, 1996; Mor Barak, 2011; Page, 2007) have emphasized the benefits that individuals, groups, organizations, and societies can derive from diversity. This understanding forms the foundation for many organizational diversity initiatives.

In the United States and elsewhere, much of the focus on and work on diversity in organizations began in the context of efforts to expand social justice and civil rights across lines of race, gender, age, disability, and other dimensions of identity that had often formed (and in many cases continue to form) the basis for systematic exclusion and discrimination. As societies and organizations expanded the degree to which members of previously excluded groups were represented in different institutions, in

different types of jobs, and at various hierarchical levels, issues of authenticity and effectiveness became more important. In many cases, members of previously excluded groups were not willing (or able or allowed) to assimilate to dominant norms and styles as a price of admission or promotion; in other cases, the quantity of newer members made intergroup differences more notable; and in still other cases, people who were already members but had needed to blend in and perhaps submerge aspects of themselves to be accepted began to be more willing to “come out” regarding previously hidden differences. These processes have meant that, as diversity has become more discussed, recognized, and valued, we seem to find and see more and more of it, along a greater number of dimensions.

Simultaneously, it became clearer that these differences, when viewed and managed as potential assets, could bring substantial benefits to organizations. Because diversity is not simply about supposedly superficial demographic facts or labels, but rather about identities, cultures, and the varied meaning and ways of thinking about and approaching situations that these represent (Ferdman, 1992; D. A. Thomas & Ely, 1996), theorists and practitioners developed descriptions of organizations that treated differences more positively. Cox (1991), for example, distinguished among monocultural, plural, and multicultural organizations, and R. R. Thomas (1990) discussed the importance of creating work environments “where no one is advantaged or disadvantaged . . . [and] where ‘we’ is everyone” (p. 109). Miller and Katz (1995), based on earlier work by Bailey Jackson and others, described a path from exclusive to inclusive organizations. Holvino (1998; see also Holvino, Ferdman, & Merrill-Sands, 2004) described the differences and transitions between monocultural exclusionary organizations, transitional compliance-focused organizations, and finally truly multicultural organizations, which “seek and value all differences and develop the systems and work practices that support members of every group to succeed and fully contribute” (Holvino et al., 2004, p. 248). Similarly, D. A. Thomas and Ely (1996) described what they called the “learning and effectiveness paradigm” or later the “integration and learning perspective” (Ely & Thomas, 2001) for addressing diversity in organizations; this approach involves

viewing and treating cultural and other identity-based differences as resources from which the whole organization can benefit and learn, rather than as something to be ignored for the purpose of avoiding discrimination or highlighted solely for the purpose of accessing niche markets.

In spite of the many arguments for the benefits of diversity at work (for example, Cox & Blake, 1991; Stahl, Mäkelä, Zander, & Maznevski, 2010), scholars have also pointed out that diversity can be associated with negative outcomes. Mannix and Neale (2005), for example, reviewed research on diversity in teams. They summarized the premise of their work as follows: “[T]here has been a tension between the promise and the reality of diversity in team process and performance. The optimistic view holds that diversity will lead to an increase in the variety of perspectives and approaches brought to a problem and to opportunities for knowledge sharing, and hence lead to greater creativity and quality of team performance. However, the preponderance of the evidence favors a more pessimistic view: that diversity creates social divisions, which in turn create negative performance outcomes for the group” (p. 31). Based on their review of relevant theory and research, Mannix and Neale concluded that, in general, identity-based differences—those based on gender, age, race, and ethnicity, for example—tended to result in more negative effects on group functioning; in contrast, what they called “underlying differences”—those grounded in characteristics such as education or functional background—were more likely to result in performance benefits, but only by carefully managing group process. They conclude that the key to effects of diversity on group performance is most likely to be found in the context and in a more nuanced understanding of the processes involved. Other reviewers (for example, Horwitz & Horwitz, 2007; S. E. Jackson & Joshi, 2011; van Knippenberg & Schippers, 2007) also report mixed results with regard to the effects of diversity in work groups on a range of processes and outcomes, including communication patterns, conflict, cohesion, commitment, turnover, creativity, innovation, and performance. Similarly, Kochan et al. (2003), in a series of studies over five years investigating the connections of business performance with gender and racial diversity, found that the effects of diversity on performance were not consistent and

in part appeared to depend on the organizational context and group processes.

In sum, it is clear from both research and practice that more diversity does not, by itself, necessarily lead to more positive outcomes for groups and organizations. Simply representing a greater variety of differences in an organization or group is not a magical path toward greater performance, for example. The frameworks mentioned earlier, proposed by Cox, by Holvino, by Miller and Katz, and by D. A. Thomas and Ely, all take this into account and describe the type of organizational cultures and group processes that are more likely not only to incorporate and value greater diversity, but also to derive its benefits. In these accounts, it is not the presence of diversity by itself but rather how it is addressed that leads to positive outcomes.

Building on this perspective, Ferdman, Avigoor, Braun, Konkin, and Kuzmycz (2010) proposed that, rather than treating diversity as a predictor of performance, it may better be viewed as a moderator of the relationship between the group's approach to differences—and more specifically inclusion—and its outcomes; in this approach, inclusion is seen as the key factor increasing performance, with the relationship expected to be stronger in more diverse groups, in which the presence of more varied resources makes inclusion especially useful. Whether or not inclusion is a predictor (see Ferdman et al., 2010), a moderator (see Nishii & Mayer, 2009), or both, it has become clearer that it is quite critical in the context of diversity. This view of inclusion as a fundamental practice for realizing the benefits of diversity in groups and organizations is addressed in the next section.

## **Inclusion as Essential to Support and Work with Diversity**

Although scholars have only recently begun to highlight inclusion as a focal construct in understanding diversity and its possible outcomes, diversity practitioners began doing so somewhat earlier (along with a few researchers, such as Mor Barak; see, for example, Mor Barak & Cherin, 1998, and Mor Barak, 2000a). In 1995, for example, Miller and Katz's (1995) path model

highlighted the importance of inclusion, and Marjane Jensen (1995) developed a list of key behaviors for inclusion to support diversity; beginning in 1996, their consulting firm, the Kaleel Jamison Consulting Group, supported the design and implementation of Dun & Bradstreet's Inclusion Initiative (see Gasorek, 2000). Also in 1996, Ferdman and Brody pointed out various models of inclusion in the context of different rationales for diversity initiatives, and in 1999, Davidson highlighted the idea that "[i]f diversity initiatives address ways of building structural and psychological inclusiveness for organizational members, they are more likely to be successful" (p. 174). Miller and Katz's 2002 book, *The Inclusion Breakthrough: Unleashing the Real Power of Diversity*, highlighted ways of doing this through systemic change in organizations, including new competencies on the part of leaders and members, and policies and practices to encourage, enable, and support these behaviors. They forcefully summarized the connection of diversity and inclusion this way: "If an organization brings in new people but doesn't enable them to contribute, those new people are bound to fail, no matter how talented they are. *Diversity without inclusion does not work*" (p. 17, italics in original).

Davidson (1999) aptly pointed out how members of organizations can have a different "expectation of being included" on the basis of their varying histories of oppression or privilege. In other words, members of more dominant groups, historically, have generally been more likely to expect that they will be able to join groups and organizations, and that once they have joined, they will be fully accepted and made to feel that they are equal and valued participants. Inclusion, in the sense described by Miller and Katz, has always been more likely for members of more powerful groups.

This connection of inclusion to inequality and the hierarchical aspects of intergroup relations in a societal and organizational context is quite important because it reminds us of some of the original goals of diversity initiatives related to addressing societal inequities and systematic discrimination. In other words, the roots of inclusion are intertwined with those of diversity in organizations, and it is in this connection that inclusion derives its power. Whether the focus of an inclusion initiative is on first making sure

that there is broad and equitable representation of multiple groups at various levels of an organization, or whether such an effort extends to addressing how differences and similarities in the now more diverse organization are viewed and treated, as well as to how the members of multiple groups experience the workplace, it is important to not lose sight of the underlying values and the intergroup context for the initiative.

Indeed, Pless and Maak (2004) addressed inclusion as an ethical imperative for diversity management. They grounded their analysis on what they called the founding principle or moral basis for inclusion—"mutual recognition" of humans for each other—which incorporates "*emotional recognition, solidarity and legal and political recognition*" (p. 131, italics in original). For Pless and Maak, "*legal and political recognition*" includes equality, particularly with regard to freedom and the rights of organizational citizenship. They argue that these types of recognition are developed through "reciprocal understanding, standpoint plurality and mutual enabling, trust, and integrity" (p. 129), which together support development and maintenance of an "intercultural moral point of view" (p. 131). Their analysis points out that noticing differences and being open to them are insufficient "especially if intellectual traditions induce people to find the one right way" (p. 133); what is necessary is what they call "standpoint plurality," which involves creating processes, in light of what are typically unequal power distributions in groups and organizations, to foster true dialogue that allows consideration of all points of view, including those that may be marginalized in less inclusive contexts.

To further understand the connections and differences between the concepts of diversity and inclusion, Roberson (2006) surveyed human resource officers in fifty-one large public companies and asked them for their definitions of both inclusion and diversity. Through content analyses, Roberson found that "definitions of diversity focused primarily on differences and the demographic composition of groups or organizations, whereas definitions of inclusion focused on organizational objectives designed to increase the participation of all employees and to leverage diversity effects on the organization" (p. 219). Specifically, respondents described diversity in terms of "the spectrum

of human similarities and differences” and conceived of diversity in organizations primarily as representation of people across this spectrum. Her respondents described inclusion, in contrast, as “the way an organization configures its systems and structures to value and leverage the potential, and to limit the disadvantages, of differences” (p. 221).

In sum, the concept of inclusion has developed as a way to capture and communicate how people and organizations must be and what they must do to benefit from diversity, both individually and collectively. Focusing on inclusion not only allows doing diversity work that emphasizes reducing negative and problematic processes—such as those grounded in prejudice, discrimination, and oppression—but also fosters a positive vision of what might replace those undesired behaviors, policies, and systems. The concept of inclusion also allows and encourages practitioners to simultaneously take into account and address multiple dimensions of diversity; inclusion recognizes the various ways in which people are different—particularly on the basis of socially and culturally meaningful categories, many involving systematic patterns of intergroup inequality—and at the same time facilitates approaches that view these categories as coexisting in whole people. Rather than focusing on individuals as representatives of only one group at a time and on one identity at a time, an inclusion lens highlights multiplicity and integration, in the context of empowerment and equality. Inclusion allows and encourages us to learn about, acknowledge, and honor group-based differences while at the same time treating each person as unique and recognizing that every identity group incorporates a great deal of diversity (Ferdman, 1995; Ferdman & Gallegos, 2001).

Inclusion has also become a key approach for working with diversity because it is global and it is scalable. It works for everyone. People—across cultures and across identities—resonate to inclusion. Inclusion can be less polemical and political than some other approaches—particularly those focused on ensuring representation, such as affirmative action, or those focused on specific group identities or “protected” groups—but it does not negate or undermine those approaches; rather, it complements them and provides a lens and practices that can help make them more

successful. Indeed, when people understand and work toward inclusion, as both a value and a practice, they can become energized and more excited about diversity and about eliminating invidious bias and discrimination. They can discover new and previously unexplored connections with other people across multiple dimensions of difference and learn valuable perspectives and skills that are personally beneficial as well as helpful to their workgroups and organizations.

The challenge for both practitioners and scholars, then, is to develop clarity about what inclusion is in the context of diverse workplaces, a topic that I now turn to.

## **What Is Inclusion? A Multilevel Perspective**

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Inclusion at work has to do with *how* organizations, groups, their leaders, and their members provide ways that allow everyone, across multiple types of differences, to participate, contribute, have a voice, and feel that they are connected and belong, all without losing individual uniqueness or having to give up valuable identities or aspects of themselves. Inclusion involves recognizing, appreciating, and leveraging diversity so as to allow members of different cultural and identity groups—varying, for example, across lines of ethnicity, race, nationality, gender, age, sexual orientation, ability/disability, cultural background, and many other dimensions—to work together productively without subsuming those differences and, when possible, using those differences for the common good (Ferdman, 2010).

Inclusion also means reframing both what it means to be an insider in a work group or organization and who gets to define that. Rather than treating membership and participation as a privilege granted by those traditionally in power to those previously excluded—often with assimilation to established norms as a condition of full acceptance—inclusive practices redefine who the “we” is in an organization or work group so that all have the right to be there and to have an equal voice, both in managing the boundary and in defining (and redefining) norms, values, and preferred styles for success (Ferdman & Davidson, 2002a; Miller & Katz, 2002). This can be challenging because in many cases it requires ongoing reexamination of previously accepted or

taken-for-granted ways of working and interacting. It means developing skills and practices for collectively reevaluating notions of what (and who) is “normal,” appropriate, and expected in ways that incorporate more voices and perspectives, many of those unfamiliar or uncomfortable for those previously in power.

The practice of inclusion is dynamic and ongoing: because inclusion is created and re-created continuously—in both small and large ways—organizations, groups, and individuals cannot work on becoming inclusive just once and then assume that they are done; it is a recursive and never-ending approach to work and life.

In this section, I review concepts of inclusion in diverse organizations in the context of an emergent framework for the practice of inclusion that spans multiple levels of analysis and incorporates multiple voices and perspectives.

## Toward a Systemic Inclusion Framework

The concept of inclusion can be quite simple. Many people can quickly describe, for example, what it feels like when they are being included and how that contrasts with exclusion. In many of my workshops (see, for example, Ferdman, 2011), I ask participants to think about and then describe to a neighbor a situation at work or elsewhere in which they have felt fully present, engaged, and included; in most cases, the immediate positive energy in the room is quite palpable, and participants are very quickly involved in animated conversations about their inclusion experience, which they can easily recall and recount.

Essentially, people often see inclusion as synonymous with a sense of belonging and participation. Schutz (1958) considered inclusion (along with control and affection) to be a central interpersonal need—albeit varying in intensity across individuals—and described it as comprising the desire to belong, to feel important, and to feel cared about. Baumeister and Leary (1995), based on a review of theoretical and empirical literature, described a basic human need to belong as a “powerful, fundamental, and pervasive motivation” (p. 497). Fiske (1994, cited in Levine & Kerr, 2007) saw belonging as a core social motive supporting people’s ability to be part of and contribute to groups.

Inclusion is also complex. It can be conceptualized and operate at multiple levels, including the individual, interpersonal, group, organizational, and societal, and may be experienced differently by different individuals and in different situations (Ferdman & Davidson, 2002b). A straightforward focus simply on belonging can be deceptive, because it can hide many of the subtleties and nuances of inclusion and its practice, and it may not necessarily address the intergroup aspects of inclusion that are most relevant in the context of diversity. Focusing solely on individuals' motivation to belong does not fully address how group or social identities play a part in the dynamics of inclusion (and exclusion). I may, for example, be part of a work group in which I feel valued, heard, and treated as an equal, full, and important member, but to achieve this, perhaps I had to change important aspects of how I communicate to become more like other members of the group, or perhaps I decided to change my name so that it would be easier for my fellow group members to pronounce, or perhaps I am reluctant to reveal aspects of myself that are quite important to me but that I believe may be misunderstood or not valued by my colleagues.

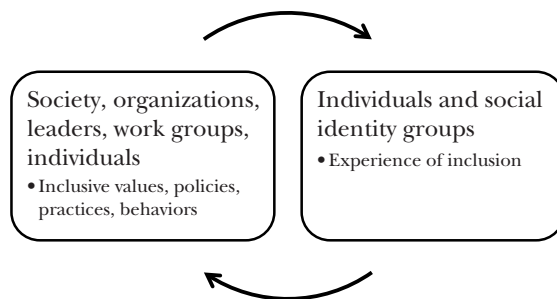
Some of this complexity is addressed by Shore, Randel, Chung, Dean, Ehrhart, and Singh (2011), in their review of theory and research on inclusion and diversity in work groups. They base their approach on Brewer's (1991) optimal distinctiveness theory, which indicates that, in general, people look for a balance between being subsumed into a larger social unit and also standing out within that unit with regard to their unique social identities. According to Brewer's theory, everyone needs to feel sufficiently connected to others, so as to be accepted and to belong, and also sufficiently individuated and different, so as not to be absorbed. Shore et al. conclude that inclusion exists when individuals' simultaneous needs for belonging and uniqueness can both be satisfied (in the context of being "an esteemed member of the work group," p. 1265). Their approach is useful because it highlights the importance of considering the interplay of multiple social identities in individual experience. In other words, my experience is typically related not just to one of my identities (such as being a man, a professor, or a middle-aged

person) but also to the unique configuration of all of my identities (Ferdman, 1995).

Another key aspect of its complexity has to do with the frame of reference for defining what constitutes inclusion. Say an organization or person decides that they would like to become more inclusive. What defines whether a particular organizational practice or individual behavior is inclusive? I believe that, ultimately, it should be based on whether or not those affected by the practice or behavior feel and are included. At the core, and particularly from a psychological perspective, inclusion needs to be conceptualized phenomenologically—in other words, in terms of people’s perceptions and interpretations. A set of objective facts cannot necessarily determine whether inclusion exists; it must be assessed based on the experience of those involved; therefore it could vary from person to person and situation to situation. In a study related to this point, Stamper and Masterson (2002) found that how many hours employees worked and how long they had been in the organization—which the researchers referred to as “actual inclusion”—were not associated with how much the employees perceived themselves to be “insiders” in the organization.

Inclusion is also not static or a one-time achievement; because it is created anew in each situation (Ferdman & Davidson, 2002b) through the relationship of the individual with the surrounding social system, inclusion involves a dynamic and interrelated set of processes, as depicted in Figure 1.1. In other words, “inclusion

**Figure 1.1. Inclusion as a Systemic and Dynamic Process**

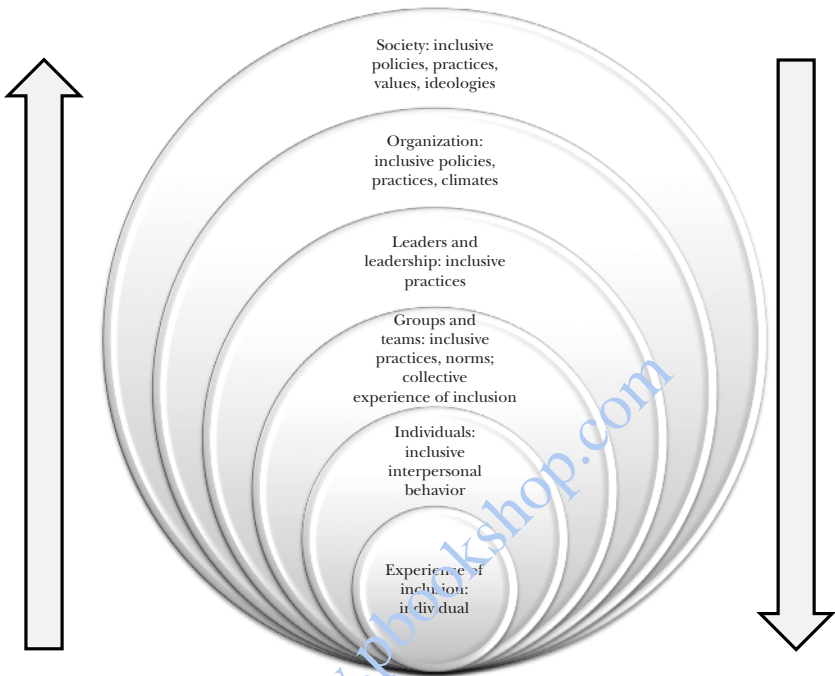


is a momentary, even evanescent creation, which depends on the particular people and the particular situation involved. At the same time, the behavior and attitude of the moment may not mean much without a history and a future, without a structure and system around them that give them the appropriate meaning and weight” (Ferdman & Davidson, 2002b, pp. 83–84). **It is in this sense that inclusion is a *practice*—an interacting set of structures, values, norms, group and organizational climates, and individual and collective behaviors, all connected with inclusion experiences in a mutually reinforcing and dynamic system.** Individuals, groups, organizations, and even societies adopt values and policies and engage in practices geared toward fostering inclusion; when these result in individual and collective experiences of inclusion, then those approaches can be considered to be inclusive. As more people and groups experience inclusion, they are more likely to have a shared sense of what it takes to create more inclusion for themselves and others and to incorporate this learning into the ongoing processes and practices of the groups and organizations of which they are a part. This will in turn increase confidence that the behaviors, policies, and practices are indeed inclusive, in a recursive and ongoing virtuous cycle.

### Inclusion at Multiple Levels

This framework (Figure 1.1) can be further analyzed to consider the various levels at which inclusion can be conceptualized, assessed, and practiced, as shown in Figure 1.2. It is important to consider multiple levels of analysis in conceptualizing inclusion because, even though individual experience plays a key role in assessing inclusion’s existence or potency, that alone is not sufficient. For example, an individual may say that she has not faced discrimination and that, on the contrary, she feels very included in her work group. But that may not be the case for other people who share one or more identity groups with her. To understand inclusion at the group level, we would need to assess how common her experience is within her work group as well as among others sharing some of her identities. It may also be possible that she is not aware of discrimination or patterns of participation that

**Figure 1.2. Systems of Inclusion:  
A Multilevel Analytic Framework**



objectively exist. If we are talking about a young African American woman, is her experience similar to that of other African American women and/or other young people? Additionally, fostering inclusion experiences requires particular behaviors on the part of leaders and other work group members, as well as suitable policies and practices in the organization. Moreover, it is more likely that experiences of inclusion will be noticed and valued and that the vocabulary for describing and sharing them will be developed in the context of inclusive practices and climates of inclusion. To fully practice inclusion, we need to simultaneously consider and address these multiple levels (depicted in Figure 1.2).

### ***Individual Experience***

As discussed previously, the foundation for inclusion is individual experience. At the individual level, I have defined the *experience*

*of inclusion* as the degree to which individuals “feel safe, trusted, accepted, respected, supported, valued, fulfilled, engaged, and authentic in their working environment, both as individuals and as members of particular identity groups” (Ferdman, Barrera, Allen, & Vuong, 2009, p. 6). In this view, I experience inclusion when I believe not only that I am being treated well individually, but also that others who share my identities and those groups as a whole “are respected, honored, trusted, and given voice, appreciation, power, and value” (Ferdman, Barrera, et al., 2009, p. 6).

These experiences of inclusion both lead to and stem from inclusive practices at other levels—particularly the interpersonal and group levels.

### ***Inclusive Interpersonal Behavior***

To help create this experience, individuals can engage in a range of inclusive behavior as they relate to others around them and can also be the recipients of such behavior. For example, to be inclusive, I can seek others’ opinions, be curious about who they are and what matters to them, treat them in ways that to them signify respect, and work with others to arrive at jointly satisfying solutions rather than impose my approach or direction. (Later, I give more examples of inclusive behavior; see also Bennett, Chapter 5, and Wasserman, Chapter 4, this volume.)

### ***Group-Level Inclusion***

Groups create inclusion by engaging in suitable practices and establishing appropriate norms, such as treating everyone with respect, giving everyone a voice, emphasizing collaboration, and working through conflicts productively and authentically. Additionally, it is possible to consider the collective experience of inclusion in the group in terms of the aggregate of individuals’ experiences (Ferdman, Avigdor, et al., 2010), again framing it as a construct grounded in perception and interpretation—in this case at the group level. For example, I worked with a client to develop an assessment of employees’ perceptions of inclusion and then was able to compare their overall sense of being included as a function of various identity categories, such as gender, ethnicity, sexual orientation, type of job, unit, and location.

### *Inclusive Leaders and Leadership*

Leaders play an important role in fostering inclusion (see Booysen, Chapter 10; Gallegos, Chapter 6, this volume; also Chrobot-Mason, Ruderman, & Nishii, 2013, and Wasserman, Gallegos, & Ferdman, 2008), and one can identify critical practices to that effect. Beyond the interpersonal behaviors that everyone can put into practice, leaders have additional responsibilities, including holding others accountable for their behavior and making appropriate connections between organizational imperatives or goals—the mission and vision of the organization—and inclusion. Beyond the particular practices of individual leaders, the approach to leadership that is preferred or valued in an organization also plays an important role in the practice of inclusion. For example, leadership may emphasize a positive approach that is strengths-based and looks for ways to bring out the potential contributions of as many people as possible. In many ways, inclusive leadership is the linchpin for inclusion at other levels of the multilevel framework; it can facilitate (and perhaps even be considered a key part of) inclusion in groups, organizations, and societies, as well as help translate and spread inclusion across these levels.

### *Inclusive Organizations*

Organizational policies and practices play a critical role in fostering a climate of inclusion and provide a context in which individual behavior and leadership are displayed, cultivated, and interpreted. This level of analysis is perhaps the one that has received the most attention on the part of both scholars and practitioners (see Church, Rotolo, Shull, & Tuller, Chapter 9; Nishii & Rich, Chapter 11; Offermann & Basford, Chapter 8; O'Mara, Chapter 14; and Winters, Chapter 7, this volume; also Kossek & Zonia, 1993, and Holvino, Ferdman, & Merrill-Sands, 2004). The organization's culture—its values, norms, and preferred styles—as well as its structures and systems, provide the container in which individuals interact and interpret their experience. Holvino et al. (2004) described an inclusive organization as one where “the diversity of knowledge and perspectives that members of different groups bring . . . has shaped its strategy, its

work, its management and operating systems, and its core values and norms for success; . . . [and where] members of all groups are treated fairly, feel and are included, have equal opportunities, and are represented at all organizational levels and functions” (p. 249). Inclusive policies and practices to achieve this can be incorporated in most if not all of the organization’s systems, including, for example, how work is organized and done; how employees are recruited, selected, evaluated, and promoted; how, by whom, and on what bases decisions are made, implemented, and evaluated; and how the organization engages with the surrounding community and other stakeholders.

### *Inclusive Societies*

Finally, these experiences, behaviors, policies, and practices all occur in the context of broader societal frameworks, including policies, practices, values, and ideologies that may or may not be supportive of inclusion (see Jonsen & Özbilgin, Chapter 12; Lukensmeyer, Yao, & Brown, Chapter 17; and Mor Barak & Daya, Chapter 13, this volume). For example, in the United States, as in other societies, there have been many debates about whether it is valuable or appropriate for individuals and groups to remain culturally distinct within the larger society (Ferdman & Sagiv, 2012). Communities and societies (as well as international organizations) can take proactive steps to promote inclusion. Inclusive communities and societies incorporate values and practices that encourage individuals and groups to maintain and develop their unique identities and cultures while continuing to fully and equally belong to and participate in the larger community.

### Conceptualizing Inclusion . . . Inclusively

The multilevel perspective described in the previous section provides a framework for organizing and developing some clarity among the many descriptions and definitions of inclusion that have begun to appear in both academic and applied work. Because the concept of inclusion can be so broad and encompass so many aspects, it can sometimes unfortunately appear that the term is not quite precise. Yet, when we sort the concepts and definitions

according to their focus and level of analysis, I believe that a much clearer and useful picture can emerge. In Table 1.1, I present many of these conceptualizations, sorted both by level of analysis and by year of publication.

The perspectives on inclusion listed in Table 1.1 are important not only because they represent a historical overview of the development and application of the concept, but also because viewing them together and in juxtaposition helps highlight key themes regarding an emergent comprehensive inclusion framework.

One such emergent theme is that there are many useful definitions of inclusion, all of which make sense in some context. I would argue that it is not necessary or even productive to arrive at one single definition of inclusion, because ultimately the suitability of a particular version of the concept will depend on our frame of reference, our purpose, and our level of analysis. At the same time, if we are to advance the field, it may be helpful and perhaps is even imperative that both practitioners and scholars seek to be clearer and more specific about how their particular or preferred approach fits into the larger system or framework of inclusion, and at which level(s). Particularly when seeking to generalize from research, but also from one applied setting to another, considering the particular operationalization of inclusion that is involved can also be helpful.

This requires knowing more about and acknowledging what others are doing and saying; being precise, where possible, about one's own perspective; and describing (or at least being aware of) how one's position or view relates to that of others. This point is somewhat analogous to the practice of inclusion itself, in that inclusion is grounded in the idea that we are all better off—collectively and individually—with a broader range of interdependent and mutually reinforcing contributions and perspectives. Bailey Jackson (1994) eloquently described it this way: “My attempts to construct a vision of a multicultural system were extremely frustrating until I realized it is impossible for me or any other single person to construct such a vision of a multicultural organization, community, society, or other social system. . . . To create a vision of a multicultural system, a diversity of perspectives must be represented in a group of people who are engaged in a

Table 1.1. Concepts of Inclusion

<i>Level of Analysis</i>	<i>Concept</i>	<i>Source</i>
<b>Individuals</b>	<p>“Inclusiveness encourages individuals of all identity groups to contribute all their talents, skills, and energies to the organization, not merely those that could be tolerated or accepted within a narrow range of monocultural style and expectations.”</p> <p>Inclusion is “the degree to which individuals feel part of critical organizational processes,” indicated by their access to information and resources, work group involvement, and ability to influence decision making.</p> <p>Inclusion is “the degree to which an employee is accepted and treated as an insider by others in a work system.” Used “three inclusion indicators: (1) decision-making influence, that is the influence that an employee has over decisions that affect him/her or the work that s/he does . . . ; (2) access to sensitive work information, that is the degree to which an employee is kept well-informed about the company business objectives and plans; and (3) job security, that is the likelihood that an employee will retain his/her job.”</p> <p>“One’s experience of inclusion in the collective is a powerful determinant of action. . . . One’s sense of feeling included is most critical because it strengthens affective commitment to the organization. If one feels included, one perceives oneself as psychologically linked to the organization, experiencing the successes and failures of the organization as one’s own.”</p>	<p>Miller and Katz, 1995, p. 278</p> <p>Mor-Barak and Cherin, 1998, p. 48</p> <p>Pelled, Ledford, and Mohrman, 1999, p. 1014–1015</p> <p>Davidson, 1999, p. 172</p>

There is “a range of aspects of the experience of inclusion, such as feeling validated, accepted, heard, and appreciated; using one’s talents and making a difference (including being part of something that is working and doing a meaningful task); having some work autonomy; receiving feedback; having one’s input solicited and used; involvement in collaboration; openness for dialogue; and wanting to learn from others. . . . [W]hile there are commonalities or general themes in terms of what people experience as inclusion—feeling valued, respected, recognized, trusted, and that one is making a difference—not everyone experiences these in the same way.”

Inclusion is “an individual’s collective judgment or perception of belonging as an accepted, welcomed and valued member in the larger organization units, such as a work group, department, and overall organization.”

Defines “belonging” as having two related aspects: “The first is social connection or affiliation, including bonds of love, friendship and shared purpose, as well as the basic ability to communicate and relate to others. . . . The second aspect is social acceptance, which enables a person to be with and among others with a sense of comfort and entitlement, or in short, a sense that she belongs and that she has a rightful place in the world.”

“Workplace Social Inclusion . . . captures the extent to which employees have informal social ties with others at work and feel as if they belong and are socially included by others in their workplace.”

“Inclusion represents a person’s ability to contribute fully and effectively to an organization.”

“An organization is inclusive when everyone has a sense of belonging; feels respected, valued and seen for who they are as individuals; and feels a level of supportive energy and commitment from leaders, colleagues and others so that all people—individually and collectively—can do our best work.”

Ferdman and Davidson, 2002b, p. 81

Hayes and Major, 2003, p. 5  
Hubbard, 2004, p. 218

Pearce and Randel, 2004, p. 84  
Roberson, 2006, p. 215  
Miller and Katz, 2007, p. 2

*Continued*

Table 1.1. Continued

<i>Level of Analysis</i>	<i>Concept</i>	<i>Source</i>
<b>Leaders</b>	<p>“We define the <i>experience of inclusion</i> in a workgroup as individuals’ perception of the extent to which they feel safe, trusted, accepted, respected, supported, valued, fulfilled, engaged, and authentic in their working environment, both as individuals and as members of particular identity groups”</p> <p>“[I]nclusion involves both being fully ourselves and allowing others to be fully themselves in the context of engaging in common pursuits. It means collaborating in a way in which all parties can be fully engaged and subsumed, and yet, paradoxically, at the same time believe that they have not compromised, hidden, or given up any part of themselves. Thus, for individuals, experiencing inclusion in a group or organization involves being fully part of the whole while retaining a sense of authenticity and uniqueness.”</p> <p>“We define inclusion as the degree to which an employee perceives that he or she is an esteemed member of the work group through experiencing treatment that satisfies his or her needs for belongingness and uniqueness.”</p>	<p>Ferdman, Barrera, et al., 2009, p. 6</p> <p>Ferdman, 2010, p. 37</p> <p>Shore, Randel, Chung, Dean, Ehrhart, and Singh, 2011, p. 1265</p> <p>Davidson, 1999, p. 172</p>

*Leader inclusiveness*: “words and deeds by a leader . . . that indicate an invitation and appreciation for others’ contributions. Leader inclusiveness captures attempts by leaders to include others in discussions and decisions in which their voices and perspectives might otherwise be absent.”

“Building a culture of inclusion involves a new set of leadership qualities and skills including flexibility, fluidity, self-awareness and mindfulness, courage, and the capacity to be vulnerable in a powerful way.”

## Groups

“Inclusive groups encourage disagreement because they realize it leads to more-effective solutions and more-successful adaptations to a changing environment. Instead of pressuring members to leave their individual and cultural differences outside, inclusive groups ask everyone to contribute to the full extent of their being.”

“Inclusion is the practice of embracing and using differences as opportunities for added value and competitive advantages in a network, product quality, and work output.”

“[I]ncreasing inclusion would require developing the skills to allow ourselves and others to see more of the complete and complex picture of our intergroup realities, as these are expressed in our everyday collaborations. It is about allowing for both similarities and differences at both the individual and the group levels at the same time that we are joined together in a common endeavor. . . . [It is about avoiding fusion, in which I act as if we are the same, as well as avoiding disconnection, in which I believe and act as if we are completely different.”

Nembhard and Edmonson, 2006, p. 947

Wasserman, Gallegos, and Ferdman, 2008, p. 180

Miller, 1994, p. 39

Katz and Miller, 1996, p. 105

Ferdman and Davidson, 2004, p. 33–34

*Continued*

Table 1.1. Continued

<i>Level of Analysis</i>	<i>Concept</i>	<i>Source</i>
<b>Organizations and Complex Systems</b>	<p>“We define <i>Collective Experience of Inclusion</i> (Collective EOI) as the overall or additive sense of the extent to which people in a group feel accepted, engaged, safe, and valued—essentially the aggregated experience of inclusion across all individuals in a group.”</p> <p>Members are “treated as . . . insider[s] and also allowed/encouraged to retain uniqueness within the work group.”</p> <p>“ . . . from the perspective of the moral imperative, inclusion implies not only eliminating barriers to opportunity based on group differences but also supporting every individual to reach her or his full potential . . . without requiring assimilation.”</p> <p>“Inclusion as seen from the perspective of legal and social pressures primarily involves removing illegal barriers . . . or obstacle(s) perceived to be unfair. . . . [This] approach tends to be primarily reactive . . .”</p> <p>“From the vantage point of business success, inclusion is about making sure the organization uses all productive capacity and potential to the full extent. . . . [It] is not limited to particular groups or categories of people. All individuals must be included in their full uniqueness and complexity.”</p>	<p>Ferdman, Avigdor, et al., 2010, p. 16</p> <p>Shore et al., 2011, p. 1266</p> <p>Ferdman and Brody, 1996, p. 286</p> <p>p. 287</p> <p>p. 289</p>

<p>“Institutional and systemic bias can also serve as an impediment to cultivating an inclusive environment.”</p>	<p>Davidson, 1999, p. 172</p>
<p>”The inclusive workplace is one that: values and uses individual and intergroup differences within its work force; cooperates with and contributes to its surrounding community; alleviates the needs of disadvantaged groups in its wider environment; collaborates with individuals, groups, and organizations across national and cultural boundaries.”</p>	<p>Mor Barak, 2000b, p. 339</p>
<p>Inclusion addresses 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.</p>	<p>Gasorek, 2000</p>
<p>“Experiences of inclusion result when policies, structures, practices, and norms of behavior are aligned in such a way that every member of a given collective (community, organization, or network) has a fair and equal opportunity to access the joint resources of that collective.”</p>	<p>Davidson and Ferdman, 2002, p. 1</p>

*Continued*

Table 1.1. Continued

Level of Analysis	Concept	Source
<p>“A culture of inclusion requires . . . a new set of actions, attitudes, policies, and practices designed to enable all people to contribute their energies and talents to the organization’s success. Conflict becomes constructive debate. People are sought because they are different.”</p>		Miller and Katz, 2002, p. 16
<p>“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 they are actively sought out <i>because</i> 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.”</p>		Holvino, Ferdman, and Merrill-Sands, 2004, p. 248 (italics in original)
<p>In an inclusive organization, “the diversity of knowledge and perspectives that members of different groups bring . . . has shaped its strategy, its work, its management and operating systems, and its core values and norms for success. . . . [M]embers of all groups are treated fairly, feel included, and actually are included, have equal opportunities, and are represented at all organizational levels and functions.” Diversity is woven “into the fabric of the organization.”</p>		p. 249

In a culture of inclusion, “differences are recognized, valued and engaged. Different voices are understood as being legitimate and as opening up new vistas; they are heard and integrated in decision making and problem solving processes; they have an active role in shaping culture and fostering creativity and innovation; and eventually in adding value to the company’s performance. . . . [A culture of inclusion is] an organizational environment that allows people with multiple backgrounds, mindsets and ways of thinking to work effectively together and to perform to their highest potential in order to achieve organizational objectives based on sound principles. In such an environment different voices are respected and heard, diverse viewpoints, perspectives and approaches are valued and everyone is encouraged to make a unique and meaningful contribution.”

Inclusion is “the way an organization configures its systems and structures to value and leverage the potential, and to limit the disadvantages, of differences.”

“Inclusion is the set of organizational norms and values that promote the development of an institutional culture in which diversity is valued and promoted and individuals feel empowered within an atmosphere of trust, safety, and respect. An inclusive work place is one that: accepts, values and utilizes individual and inter-group differences within its workforce. A warm and welcoming atmosphere eases the process of ‘learning the ropes’ for the new member and aids in making the member comfortable in the new group environment.”

“For us, a culture of inclusion recognizes, respects, values, and utilizes the talents and contributions of all the organization’s people—current and potential—across multiple lines of difference [ . . . ]. In organizations with cultures of inclusion, people of all social identity groups have the opportunity to be present, to have their voices heard and appreciated, and to engage in core activities on behalf of the collective.”

Pless and Maaak,  
2004, p. 130–  
131

Roberson, 2006,  
p. 221  
Future Work  
Institute, n.d.,  
p. 6

Wasserman,  
Gallegos, and  
Ferdman, 2008,  
p. 176

dialogical process. . . .” (p. 116). Building on Jackson’s view, I believe that understanding of inclusion and its dynamics will be enhanced and deepened to the extent that those of us engaged in it share our views and approaches with each other and know about and build on each other’s work. Because each of us holds just one or at most a few of the many jigsaw puzzle pieces necessary to build the full picture of inclusion, we must be able and willing to put in our piece(s), while at the same time being careful not to confuse our part with the whole picture.

In this sense, a prerequisite for inclusion that is not mentioned in the quotes is perhaps humility. To the extent that individuals—whether individual contributors or leaders—believe and accept that no one person can see, understand, and know everything, and then act accordingly by creating opportunities for learning and action based on multiple inputs, contributions, and perspectives, the likelihood of creating inclusion will be greatly enhanced.

A second key theme is that inclusion has both individual and collective components; in other words, it can be viewed as something that has to do with how individuals experience their life, work, and interactions, and it can also be looked at in terms of how social groups collectively experience the world. Both components are important for a complete picture of inclusion. In this context, inclusion involves growth and freedom, and eliminating the psychological, behavioral, and systemic barriers that can stand in the way. Addressing this at both the individual and collective levels, in the context of work groups and organizations, as well as society more generally, means attending both to the complex ways in which individuals are interconnected with (and in part defined by) social identity groups (see Ferdman & Roberts, Chapter 3, this volume) and to intergroup relations—how social identities play a role in individual and interpersonal situations as well as in organizations more generally. In prior work, I described it this way: “to create and increase inclusion, individuals must have appropriate competencies and demonstrate corresponding behaviors. Inclusion cannot exist without individuals who seek it and behave accordingly. At the same time, those individuals choose, display, and interpret their behavior and that of others in the context of

organizational, intergroup, and socio-historical dynamics that are also very much part of the puzzle of inclusion” (Ferdman & Davidson, 2004, p. 36).

A final notable theme is that, even though the definitions provided are often framed in terms of workplaces, inclusion is a concept and practice that can more or less apply to everyone in all locations and social systems, across multiple differences; it is not limited to workplaces or to particular groups or types of diversity. Indeed, this is what makes inclusion in many ways quite easy for people to understand and particularly appealing as an approach to diversity. Because it is a concept that intuitively makes sense to people, however, it is relatively easy to focus on only one or some of the levels of system and ignore or even avoid the others, even when they may be quite important. For example, an organization can pay a great deal of attention to corporate policies that create barriers for certain groups more than others, but very little to how people actually treat each other every day. Or people in a workgroup can be extremely competent in handling multiple differences in ways that are quite satisfying to and very inclusive of all members, yet avoid any and all attention to whether or not they are fostering inclusion in a larger societal or organizational sense (for example, because their task or product is one that privileges particular societal groups over others). A systemic, dynamic, and inclusive perspective on inclusion incorporates attention to these and similar issues, as well as to ongoing learning over time.

### Contributions from Inclusive Education and Social Inclusion

Although inclusion has recently gained prominence in connection with diversity in organizations, historically, the concept of inclusion was first developed and used extensively in the field of education, particularly of children with disabilities, and later expanded in relation to people with disabilities more generally. In the context of disability rights, inclusion has signified the perspective that people with disabilities should be able to fully participate in all aspects of society and its institutions. The Americans with Disabilities Act (ADA) in the United States and

the United Nations Convention on the Rights of People with Disabilities (<http://www.un.org/disabilities/convention/conventionfull.shtml>) are both major examples of this approach and perspective.

In education, inclusion goes beyond notions of mainstreaming and integration, which privilege students without disabilities and consider those with disabilities as having “special needs.” Rather, it refers to the rights of all students to participate fully in all aspects of the school and to have full access to education, without being separated from other students or being seen as less than others (see, for example, Bossaert, Colpin, Pijl, & Petry, 2013; Hick & Thomas, 2008). UNESCO, in a document emphasizing education as a basic human right for all people, defined inclusion “as a dynamic approach of responding positively to pupil diversity and of seeing individual differences not as problems, but as opportunities for enriching learning” (2005, p. 12). It goes on to describe inclusion “as a process of addressing and responding to the diversity of needs of all learners through increasing participation . . . and reducing exclusion within and from education. It involves changes . . . in content, approaches, structures and strategies, with a common vision . . . and a conviction that it is the responsibility of the regular system to educate all children” (p. 17). Particularly interesting and relevant here is the emphasis on changing the educational system and the school itself, rather than focusing on the children with “special” needs as the source or locus of problems or difficulties. In a similar way, inclusion in organizations is about creating work environments and processes that “work” for everyone, across all types of differences, rather than ones that emphasize assimilation.

A third and overlapping use of the term, *social inclusion*, is more typical in a larger societal context and from the vantage point of public policy, economics, political science, and sociology. Here the focus is on eliminating social exclusion as manifested in individual and particularly collective social disadvantages of poor or otherwise marginalized people in society—including those in the economic, political, health, housing, educational, labor, and similar arenas (see, for example, Atkinson & Marlier, 2010); social

inclusion seeks to improve the material and economic conditions of such groups, as well as their full enfranchisement in society and their participation in its institutions. Boushey, Fremstad, Gragg, and Waller (2010) explain that “[s]ocial inclusion is based on the belief that we all fare better when no one is left to fall too far behind and the economy works for everyone. Social inclusion simultaneously incorporates multiple dimensions of well-being. It is achieved when all have the opportunity and resources necessary to participate fully in economic, social, and cultural activities which are considered the societal norm” (p. 1). The Australian Social Inclusion Board (2012) described social inclusion in this way: “Being socially included means that people have the resources, opportunities and capabilities they need to: Learn (participate in education and training); Work (participate in employment, unpaid or voluntary work including family and carer [*sic*] responsibilities); Engage (connect with people, use local services and participate in local, cultural, civic and recreational activities); and Have a voice (influence decisions that affect them)” (p. 12). This approach has elements that relate well with the practice of inclusion in diverse organizations, but it places less emphasis on individual experience, group processes, and interpersonal interactions, and more on social and economic policies and their effects.

## Elements of Inclusion at Work

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So far, I have presented various ways to conceptualize inclusion in the context of an emergent multilevel framework. From a practical perspective, the question then arises as to how to operationalize inclusion at each of these levels. What are the specific elements of inclusion? As exemplified in many of the quotes in Table 1.1, there are multiple ways to describe these, and the particular elements that are addressed can vary. In this section, I provide illustrative examples of such lists from my own research and consulting work as well as from other sources. First, I briefly discuss the importance of involving stakeholders in generating their own operational descriptions of inclusion, and I give an example of how this can be done.

## Co-Constructing Inclusion

It is important to be specific about the elements of inclusion, especially in the context of inclusion initiatives, so that those involved can be clear about what is being addressed and what the goals are. My aim here, however, is not to provide a definitive list of all that the practice of inclusion encompasses, because rich descriptions are available in the academic and practitioner literature, and more important, as discussed earlier, these may vary from organization to organization or even from person to person.

Organizations and groups that wish to systematically embark on inclusion initiatives should carefully develop their own account of the specific ways that their current and prospective members and stakeholders experience inclusion, and of the behaviors, policies, and practices that foster those experiences, in the context of shared understanding of the concept of inclusion and its multiple facets. This is because lists of inclusive behaviors and practices will be most meaningful and useful when they are generated and discussed locally, among the people who will be involved in practicing those behaviors or benefiting from them, even if those lists are initially based on prior work. I suspect that inclusion that feels imposed will not be experienced as inclusion!

Another reason for developing one's own list of inclusion elements is that the process of creating localized operational definitions can itself provide a vehicle to begin practicing the very same desired behaviors and to test the expectation that they are the appropriate and best focus for an inclusion effort. For example, in one group, spending more time carefully listening to others may be an area that requires particular attention to foster more inclusion among its members. In another group, this may already be a behavior that is practiced well but other areas—such as making sure that those affected by decisions have a voice in making them, or increasing the group's skill in bringing out differences and handling conflict well—may need more attention. In yet other groups, the core inclusion issues may involve fairness and equity and their association to social identities, such as gender, race, or class. This understanding can be developed in the process of discovering the key issues for the group; at the same time, the

group can test how it is doing in terms of acting on its expressed goals and values.

How can a group or organization generate its own detailed list of the elements of inclusion? Essentially, it can be done by involving key stakeholders in a process of describing their own experiences, perspectives, and hopes, and systematically combining the information generated to arrive at a collective picture of inclusion. Exhibit 1.1 provides examples of questions—generated using an appreciative inquiry approach—that can be adapted to engage individuals and groups in describing the specific behaviors and practices that they believe would result in more inclusion. (Prior to addressing these questions, it may be helpful to first spend some time discussing what participants consider inclusion to be.)

**Exhibit 1.1. Questions to Generate and Co-Construct Descriptions of Inclusive Behavior and Inclusive Organizational Practices**

- What behaviors—from yourself and from others—help *you* experience more inclusion?
- What behaviors help *others* around you experience more inclusion?
- Imagine that you've waved a magic wand and now everyone in the world behaves inclusively, in a way that brings inclusion to life in every encounter with others. What *inclusive behaviors* do you see around you?
- Imagine the most inclusive organization in the world, one in which everyone's talents, beliefs, backgrounds, capabilities, and ways of living—their uniqueness—is engaged, valued, and leveraged. What are one or two vital *inclusive organizational policies and practices* in that organization?

A few years ago, Frederick Miller and Christine Boulware brought together a number of practitioners and others interested in developing inclusion as a core idea for organizations and society. The result was the formation of a group called the Institute for Inclusion. In that context, a team composed of myself,

Judith Katz, Ed Letchinger, and C. Terrill Thompson—using a collaborative process of co-construction based on input from conference participants in response to questions very similar to those in Exhibit 1.1—created a list of inclusive behaviors and organizational policies and practices in three categories: (1) inclusive behaviors suitable for everyone, (2) inclusive behaviors for leaders, and (3) inclusive organizational policies and practices (Ferdman, Katz, Letchinger, & Thompson, 2009). Later, I give a summary of these lists; what is relevant here is the process we used, which can be adapted to different settings. Participants were first asked to generate individual responses to the questions. These responses were then compiled. Small groups were assigned to look for key themes and to assign behaviors and practices to one of the three buckets, as well as to add additional points as they saw fit. The working group took the material from the small groups and combined it into a document that was shared with everyone in the group, who then could provide additional suggestions, edits, and comments. The idea is to create a process that is itself inclusive and that permits generating an operational perspective for the practice of inclusion among those participating, a perspective in which everyone can feel ownership and see themselves reflected.

## Elements of the Experience of Inclusion

In the context of developing and testing a measure of workgroup inclusion, my students and I (Ferdman, Barrera, et al., 2009; Hirshberg & Ferdman, 2011) defined the experience of inclusion, which, as discussed earlier, we conceptualized as involving feelings of safety, respect, support, value, trust, fulfillment, engagement, and authenticity within the workgroup. Based on that work, we can identify six key operational elements of the experience of inclusion and the associated issues, which are listed and described in Table 1.2. What is interesting about the elements and issues listed is that, while they cover a lot of ground, they are not necessarily all-encompassing; it may be possible in some contexts to produce lists that vary from the one here in terms of adding additional components or changing some of them to emphasize somewhat different issues. Nevertheless, the overall themes are likely to be quite similar.

**Table 1.2. Elements of the Experience of Inclusion**

<i>Element</i>	<i>Examples of Issues Addressed</i>
Feeling safe (self and group)	Do I feel physically and psychologically safe? Do I feel secure that I am fully considered a member of the group or organization? Can I move about and act freely (literally and figuratively)? Can I (and others like me) share ideas, opinions, and perspectives—especially when they differ from those of others—without fear of negative repercussions? Do I believe that others who share one or more of my identity groups are also safe from physical and/or psychological harm in the group or organization?
Involvement and engagement in the workgroup	Am I treated as a full participant in activities and interactions? Am I—and do I feel like—an insider? Do I have access to the information and resources that I need to do my work (and that others have)? Do I enjoy being part of the group or organization? Can I rely on others in my group or organization (and they on me)? Do I feel like we are part of the same team, even when we disagree? Can I (or people like me) succeed here?
Feeling respected and valued (self and group)	Am I (and others like me) treated in the ways I (they) would like to be treated? Do others in the group care about me (and people like me) and treat me (and them) as a valuable and esteemed member(s) of the group or organization? Am I trusted? Am I cared about? Are people like me trusted and cared about?
Influence on decision making	Do my ideas and perspectives influence what happens and what decisions are made? Am I listened to when weighing in on substantive issues?
Authenticity/bringing one's whole self to work	Can I be truly myself around others in my group or organization? Do I need to conceal or distort valued parts of my identity, style, or individual characteristics? Can I have genuine conversations with others without needing to involuntarily hide relevant parts of myself? Can I be open, honest, and transparent about my ideas and perspectives? Can I make my contributions in ways that feel authentic and whole?

*Continued*

**Table 1.2. Continued**

<i>Element</i>	<i>Examples of Issues Addressed</i>
Diversity is recognized, attended to, and honored	Am I treated fairly, without discrimination or barriers based on my identities? Can I (and others) be transparent about and proud of my (our) social identities? Can we address differences in ways that lead to mutual learning and growth? Does the group or organization notice and value diversity of all types?

*Note:* Elements are adapted from Ferdman, Barrera, et al., 2009, and Hirshberg and Ferdman, 2011.

Building on this approach, I worked as an external consultant for a multinational corporation that wanted to generate a global inclusion survey. With my input, they created a four-item inclusion index, grounded in the organization's values and success factors, to assess employees' experience of inclusion. In addition to a global item assessing the individual's overall sense of being included, we also asked about how much the respondent felt that the company valued his or her unique contributions and strengths, to what degree the respondent believed that he or she (or others who are similar) could succeed at the company, and to what degree the respondent believed that he or she had equitable access to necessary information, tools, and resources. This index could then be statistically regressed on other items measuring inclusive behavior at other levels of analysis to discover the key drivers of inclusion in the organization, as well as compared across various demographic categories.

## Elements of Inclusive Behavior

Inclusive behavior can be operationalized in a variety of ways, in part depending on who we are talking about. For example, there are behaviors that most people can practice in a range of situations as a way to build inclusion for themselves and others. There are additional behaviors that may be suited for particular settings; for example, in a work group. And there are behaviors that are

associated with particular roles, especially that of leaders. Descriptions of inclusive behavior are particularly important because they can provide people with suggestions about what they can specifically do to foster inclusion.

Marjane Jensen (1995) was an early pioneer in explicitly listing behaviors for inclusion. Her list, later developed and expanded by Katz and Miller (2011), highlighted the importance of the following types of behavior for creating inclusion:

- Authentically greeting other people
- Fostering a feeling of safety
- Listening and understanding
- Communicating clearly and honestly
- Working through and learning from conflicts
- Seeking and listening to multiple voices and perspectives
- Noticing when exclusion occurs and intervening to address it
- Being intentional about individual and collective choices when working in groups
- Being courageous

In an application of this approach, The Hartford Financial Services Group (The Hartford, 2006) highlighted and stressed the following elements of inclusive behavior to its employees:

- Listen to all individuals until they feel understood
- Accept others' references as true for them
- Be honest and clear
- Build on each other's ideas and thoughts
- Take risks
- Speak up for oneself

Pless and Maak (2004) listed the following as key inclusive behaviors, based on a set of inclusion competencies:

- Showing respect and empathy;
- Recognizing the other as different but equal;
- Showing appreciation for different voices, e.g. by
  - Listening actively to them;
  - Trying to understand disparate viewpoints and opinions;

- Integrating different voices into the ongoing cultural discourse.
- Practising and encouraging open and frank communication in all interactions;
- Cultivating participative decision making and problem solving processes and team capabilities;
- Showing integrity and advanced moral reasoning, especially when dealing with ethical dilemmas;
- Using a cooperative/consultative leadership style [p. 140]

In the work to create a workgroup inclusion measure described earlier (Ferdman, Barrera, et al., 2009), we also developed an operationalization of inclusive behavior, based on the following categories:

- Creating safety
- Acknowledging others
- Dealing with conflict and differences
- Showing an ability and willingness to learn
- Having and giving voice
- Encouraging representation

Creating safety involves having and using clear ground rules for respectful behavior, avoiding belittling others, and speaking up about issues that matter to people and the organization. Acknowledging others involves not only greeting people but also recognizing contributions and asking for input, in a manner that also connects to coworkers in personal and human ways. Dealing with conflict means being able and willing to address it as it arises, developing skills for effectively working through and learning from conflict, and developing cultural competence for working with those who may think and behave quite differently. Being able and willing to learn includes such behaviors as asking for and providing feedback, sharing information, and using multiple perspectives to arrive at collaborative solutions. Voice-related behaviors involve speaking up and making one's full contributions to the group and organization, and providing opportunities for others to do so, as well as showing others that

their contributions are valued; research by Major, Davis, Sanchez-Hucles, Germano, and Mann (2005) indicates that this can be done through both affective support, such as listening and being sympathetic, and instrumental support, such as helping with work responsibilities or switching schedules. Finally, encouraging representation means taking proactive steps to ensure that multiple voices and people of different identity groups and perspectives are present and involved. This last category includes many of the behaviors highlighted in traditional diversity initiatives that focus on making sure that groups and organizations actually incorporate diversity along multiple dimensions and across functions and hierarchical levels.

In working to develop a global inclusion survey with the company mentioned earlier, I used a similar perspective on inclusive behavior, but first I generated an overarching list of inclusion elements, which could then be translated into assessment items focused on specific groups. For example, participants rated their own inclusive behavior, that of members of their work group, that of their supervisors, and that of company leaders. The broad elements that we incorporated were collaboration/interdependence (feeling valued), fair and unbiased treatment, leadership and accountability, open communication, support, authenticity, trust, and work-life balance. We then ensured that there were items measuring the various elements for the different groups. Ratings of inclusive behavior could then be computed for the various groups (that is, self-ratings, work group ratings, supervisor ratings, and so on) as well as for each of the elements.

Finally, I turn to the work of the Institute for Inclusion (Ferdman, Katz, et al., 2009) introduced earlier. In that process, as mentioned, we generated two lists of inclusive behavior, one for everyone and one for leaders. The behaviors for everyone are those that anyone can practice to foster inclusion. Behaviors for leaders are complementary to those in the first list and are particularly geared for individuals holding positions of authority. The two lists are summarized in Table 1.3 (together with organizational policies and practices, which I discuss next).

**Table 1.3. Inclusive Behaviors for Everyone and for Leaders;  
Inclusive Organizational Policies and Practices**

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**Inclusive Behavior for Everyone**

- Acknowledge, connect, and engage with others.
- Listen deeply and carefully.
- Engage a broad range of perspectives.
- Openly share information and seek transparency.
- Be curious.
- Lean into discomfort.
- Increase self-awareness.
- Be willing to learn and be influenced by others.
- Be respectful and demonstrate fairness.
- Foster interdependence and teamwork.

**Inclusive Behavior for Leaders**

- Hold oneself and others accountable for creating an inclusive culture.
- Invite engagement and dialogue.
- Model bringing one's whole self to work, and give permission for and encourage others to do so.
- Foster transparent decision making.
- Understand and engage with resistance.
- Understand and talk about how inclusion connects to the mission and vision.

**Inclusive Organizational Policies and Practices**

- Create an environment of respect, fairness, justice, and equity.
  - Create a framework for assessing and implementing organizational policies and practices.
  - Build systems, processes, and procedures that support and sustain inclusion.
  - Enhance individual and collective competence to collaborate across cultures and groups.
  - Define organizational social responsibility (internally and externally).
  - Foster transparency throughout the organization.
  - Promote teamwork.
  - Create a diverse organization.
  - Foster continual learning and growth.
- 

*Source:* Adapted from Ferdman, Katz, Letchinger, and Thompson, 2009.

## Elements of Inclusion at the Organizational Level

At the organizational level, there are many practices organizations can adopt to create, foster, and sustain inclusion. Table 1.3 includes a broad list of these, generated by Ferdman, Katz, et al. (2009) using the process described earlier. Other detailed examples can be found in Holvino et al. (2004) and in various chapters in this volume, so I do not repeat those here. The key is for the organization to have a clear approach to inclusion and that this approach be translated into specific strategies, policies, and practices that can be observed and assessed. These practices should not only build inclusion systemically but also encourage leaders and all members of the organization to practice inclusion in their individual and collective behavior, both to support the overall culture of inclusion as well as to ensure that as many people as possible regularly experience inclusion.

One way to do this is to decide on the key dimensions of inclusion for the organization and how these can be addressed for each of the key dimensions, functions, or systems of the organization. In Figure 1.3, I present an Inclusion Assessment Matrix that my students and I (Ferdman, Brody, Cooper, Jeffcoat, & Le, 1995) developed almost two decades ago and that continues to be quite relevant. Across the top row we list the various systems of the organization, and down the left side we list the various dimensions of inclusion we identified at the time. For each of these dimensions of inclusion, we created illustrative general assessment questions or topics, which are also included in the figure.

Once the dimensions of inclusion are identified and defined, then they can be operationalized for the organization as a whole and for each of the relevant systems or functions of the organization.

## Facing the Challenges and Paradoxes of the Practice of Inclusion

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This chapter has covered much ground, and the book's other chapters provide a great deal of additional texture and rich perspectives and detail for the practice of inclusion. I conclude by

**Figure 1.3. Organizational-Level Inclusion Assessment Matrix**

Dimensions of Inclusion	Dimensions of the Organization									
	Socialization	Career planning	Recruitment, selection, promotion	Training and education	Performance appraisal	Reward systems	Work/life policies and practices	Communication	Measurement	Structural and informal integration
Openness	<u>Openness:</u> How much are variability, complexity, and ambiguity embraced? To what extent are the system and its boundaries open rather than hard?									
Representation and voice	How acceptable is rigidity? Are there multiple solutions and many best ways? Is there a broad bandwidth of acceptance?									
Climate	<u>Representation/Voice:</u> To what extent are differences, both apparent and not, attended to and represented across situations? Is there a critical mass of diverse members, with a mix of dimensions represented, in making decisions and benefiting from them?									
Fairness	<u>Climate:</u> How valued do individuals and groups feel? Are they fully present, free to express themselves, accepted and integrated? How does it feel to be in the organization?									
Leadership and commitment	<u>Fairness:</u> To what extent do individuals and groups receive what they need and deserve? How much and in what ways is fairness considered? Are there mechanisms for resolving or addressing fairness? To what extent and in what ways has oppression and its effects (such as unearned privilege) been eliminated or reduced?									
Continuous improvement	<u>Leadership/Commitment:</u> To what degree and in what ways are the strategies, vision, and mission of the organization connected to inclusion? How are resources allocated? How well do leaders model inclusion? How accountable and committed is leadership? How strategically is inclusion positioned and addressed? How central is inclusion to the core values and strategy of organization?									
Social responsibility	<u>Continuous Improvement:</u> What is the capacity, ability, and mindset regarding necessary and possible improvement? How much and in what ways are employees empowered to be responsible for continuous improvement? What is the capacity to take advantage of all resources?									
	<u>Social Responsibility:</u> How much awareness is there of the world outside the organization? What is the vision of the organization as a member of a larger community? What kinds of contributions (such as time and resources) are made to societal needs?									

Source: Adapted from Ferdman, Brody, Cooper, Jeffcoat, and Le, 1995, *Inclusion Assessment Matrix*, unpublished document, California School of Professional Psychology, San Diego, CA.

very briefly discussing a few of the challenges of inclusion. Overall, the practice of inclusion involves being able to acknowledge, recognize, value, and work with diversity, in ways that benefit individuals, groups, organizations, and society, at multiple levels and across multiple identities. As discussed throughout this chapter, to do this well, we need to understand and engage with a good deal of complexity, while also making sure to address the essential and basic aspects of our common humanity and our needs for connection, consideration, respect, appreciation, and participation. Many of the challenges of inclusion involve attending to and engaging with seeming polarities or paradoxes, in the process of creating connections and practices that can work for everyone and allow everyone to work to their full potential. They also involve being willing to reexamine and test assumptions and to join with others with different perspectives and contributions so as to together weave an emergent and textured reality that none of us could have created or anticipated alone.

- **The practice of inclusion is about *both* everyday behavior and organizational and social systems.** The practice of inclusion addresses both micro *and* macro levels (and everything in between). Inclusion must occur in terms of individual experience and everyday interpersonal behavior, and also in terms of intergroup relations and patterns of experience at the level of complex organizational and societal systems. We need to make sure that inclusion is experienced not just by those who are most similar or most near to us, but also those who are different on key dimensions or who are not part of our proximal social system, such as those in other organizations, communities, and societies. Individual experience and interpersonal behavior, in the moment, are critical to inclusion, but so are addressing and redressing embedded and persistent systems of intergroup injustice and oppression (and the relationships among the two) in organizations and society.
- **The practice of inclusion is about *both* structures and processes.** To address inclusion, we need a dynamic perspective that attends to multiple processes over time. Inclusion is about patterns of behavior and experience in the context of relationships between individuals, between people and their

groups and organizations, and between groups. At the same time, the structures within which these dynamic relationships are created, enacted, interpreted, reproduced, and developed are also critical. Who is where in what parts of the system? What is the distribution of power? How is work organized? The answers to these and many similar questions are important for understanding the processual aspects of the practice of inclusion. How we treat each other, how we communicate, how we engage with others are all critical to inclusion as well, and over time can help change the structures within which these patterns occur. Indeed, the relationship between structure and process is perhaps much like that between a flowing river and its banks: the banks of the river certainly channel and shape where and how the river flows; yet, simultaneously, the flowing waters slowly and surely shape and change the river's seemingly solid and stationary banks.

◦ **The practice of inclusion is about *both comfort and discomfort*.** In many ways, inclusion involves creating more comfort for more people, so that access, opportunity, and a sense of full participation and belonging are facilitated across a greater range of diversity than ever before, for the benefit of all. At the same time, practicing inclusion means distributing discomfort more equitably. Frederick Miller (1994) provocatively and creatively described it this way: "*Inclusion turns comfortable upside out and inside down*" (p. 39, italics in original). We need to move out of our individual and collective comfort zones, yet do so in a way that leads to growth, learning, and mutual and collective benefit.

Let me explain: It is not very difficult to behave inclusively with people with whom we are familiar or who are most like ourselves. Historically, however, this has happened in the context of exclusive organizations and groups. For example, once college students are able to get through the hazing typically imposed to be invited to join a fraternity or sorority, they can feel very much a part of the group. The problem is that inclusion of that type typically comes at a price: to experience inclusion, members of selective and therefore exclusive organizations or groups must assimilate to the dominant norms, styles, and practices, and subsume the ways

in which they are different from the accepted or dominant ways of doing things. This means that those from less represented, less familiar, or less dominant groups and backgrounds will typically be more uncomfortable and less at ease than their colleagues.

In diverse groups, organizations, and societies, inclusion becomes both more important and more challenging and uncomfortable, because the key is to expand the experience of inclusion while maintaining and enhancing diversity. Essentially, the practice of inclusion requires becoming more comfortable with discomfort, both individually and collectively. More of us must be willing to take on the discomfort of being less than fully secure as we engage with each other to create inclusion. We must be willing to learn continuously and recognize that the practice of inclusion is never done; it requires ongoing alertness and engagement. As we notice and work across more and more types of diversity, this stance will be even more critical.

◦ **The practice of inclusion is about both deriving practical benefits and about doing what is right and just.** Certainly, a key motivation for practicing inclusion is based on the premise that it will lead to tangible benefits for individuals, groups, organization, and societies. This assumption has begun to receive empirical support and is also based on existing and emergent theories and practical experience. At the same time, the practice of inclusion will be enhanced (and perhaps even greater benefits will be derived), if we simultaneously acknowledge that it is simply right, just, and moral.

Facing the challenges and paradoxes of the practice of inclusion will require ongoing learning and contributions from multiple perspectives and disciplines. It is an evolutionary journey and it will be very exciting to see how the emergent framework described here develops and changes as others add their voices and views to our collective understanding and practice.

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