# UNDERSTANDING PRACTICES WHICH FOSTER INCLUSION: VIEWS FROM THE TOP

## Abstract

**Purpose** – This study aims to deepen understanding of inclusionary practices used within organizations, and how they satisfy specific inclusion needs.

**Design/methodology/approach** – We adopt a qualitative research design, reporting on data from semi-structured interviews conducted with 15 Diversity and Inclusion (D&I) Directors/Leads and using a thematic approach to analysis.

**Findings –** Our study expands understanding of inclusion practices, showing that they are not uniformly implemented and that practices may satisfy both needs to belong and differences valued, with interviewees prioritising belonging. Well-being and career development are seen as important inclusion practices demonstrating support and appreciation of difference, thus as inputs not outputs of inclusion challenging existing assumptions. Inclusionary practices are malleable and the extent to which they foster inclusion depends critically on the leaders involved and their commitment to equality, diversity and inclusion (EDI).

**Originality –** Our study shows *how* practices satisfy inclusion needs and that the implementation of practices varies, depending on the leaders involved.

**Key words** – Inclusive organization, Inclusion practices, Leadership, Belonging, Valuing uniqueness

**Paper type –** Research paper

## The inclusive workplace

Organizations are increasingly focusing on initiatives to foster equality, diversity and inclusion, going beyond diversity to create a workplace where people from many backgrounds are valued. Organizations accrue benefits through increasing diverse representation to improve performance (Sabharwal, 2014) and see it as morally right (Ferdman, 2014), yet diversity across many dimensions remains elusive. Literature

has tended to focus on diversity management and exclusion prevention (van Eck, Dobusch, van den Brink, 2023), but this approach assumes that anti-discrimination practices will lead to recruitment and retention of under-represented groups, such as women, ethnic minority and neurodiverse groups. In recent years it has become widely recognised that diverse representation alone is insufficient; without inclusion the benefits of diversity will not be realised (Sabharwal, 2014; Nishii, 2013). It is through inclusion that retention (Nishii, 2013) and career advancement of under-represented groups improves (Shore *et al.*, 2018), leading to longer term increase in diverse representation. The literature on the inclusive workplace is expanding but understanding how inclusion is fostered is less distinct (Roberson, 2019). Providing a more comprehensive understanding of inclusion, will help organizations determine how to foster a more inclusive organization.

This research aims to contribute to the literature through building a greater understanding of organizational practices which foster inclusion. Using a qualitative approach, semi-structured interviews were conducted with 15 Diversity and Inclusion (D&I) leads, senior professionals responsible for the equality, diversity and inclusion (EDI) agenda within a range of organizations. We begin with a review of the extant literature on the inclusive organization and inclusion practices. We then describe how the interview data were collected and analysed, along with the findings. Finally, we discuss the findings within the context of the literature and indicate implications for theory and practice.

## Model of the inclusive workplace

Workplace inclusion is a nascent field of research (Chen and Tang, 2018) with the words diversity and inclusion sometimes used interchangeably. It is more helpful to consider diversity and inclusion as distinct, yet inter-related concepts (Roberson, 2006). Diversity recognises differences and inclusion focuses on diversity as a resource, where everyone can bring their "whole selves" to work (Nishii, 2013). In their seminal paper Shore and colleagues (2011) conceptualise inclusion as the degree to which an employee perceives they are an esteemed member of the group, satisfying both their social need for belongingness and the individual need for having their uniqueness valued. This indicates that everyone in the workplace seeks a balance between satisfaction of belongingness and uniqueness needs, but some may seek more of one than the other, which may also vary over context. Other studies have

sought to broaden the conceptualisation of inclusion as more complex, where people may feel included and excluded at the same time by different organizational practices. This suggests a multi-faceted process that can shift over time (Cassell *et al.*, 2020). In the research reported here, we assume that inclusion is a positive concept (Adamson *et al.*, 2021), enabling organizations to leverage the advantages of a more diverse workforce, through greater creativity, improved role performance (Shore et al., 2011; Mor Barak et al., 2016) and organizational performance (Sabharwal, 2014).

In contrast, viewed through a critical lens the concept of inclusion is contested and remains elusive. Van Eck *et al.* (2023) suggest it is probably impossible for inclusion to be free of contradictions and conflicts. Organizations may present themselves as inclusive but inclusion efforts may be insufficient to address historically embedded hierarchies between groups (Ortlieb and Sieben, 2014). Inclusion efforts may even "preserve existing power asymmetries because the terms of one's inclusion are still defined by members of the power-wielding elite" (Dobusch, 2021, p380). Some argue that inclusion is superior to, and replaces diversity (Adamson *et al.*, 2021). These scholars call to move beyond a linear, or static model of inclusion or exclusion (van Eck et al., 2023) and move to a multi-layered approach (Adamson *et al.*, 2021; Cassell *et al.*, 2020).

Nonetheless, there is common ground between mainstream and critical scholars, who see exclusion prevention and inclusion as interdependent in the inclusive organization. Van Eck *et al.* (2023) from a critical perspective, conclude that inclusion and exclusion-prevention practices are complementary, not oppositional. Fostering an inclusive organization requires both anti-discrimination practices, to remove barriers faced by under-represented groups, and practices aimed at inclusion (Sabharwal, 2014), to retain diversity (Shore *et al.*, 2018). Shore *et al.* (2018), describe a two-stream model of the inclusive workplace where management orient to both exclusion prevention and inclusion promotion practices as interdependent. It is important to take-into-account that organizations are not *either* exclusive, *or* inclusive, inclusion is 'ongoing' (Byrd, 2022). Organizations can assess their levels of maturity using a D&I maturity model such as the one presented in a Deloitte report (Bourke and Dillon, 2018) which proposes four levels of D&I goals and actions working towards greater and more embedded inclusion from legal compliance, then HR and programme led, followed by leader led. Transition to the fourth level is led by the whole

organization when D&I is fully integrated into the strategy, "employee and other business processes". Given the importance of integrating inclusion into organizational processes and practices we now explore the treatment of inclusion practices in the literature.

*Identifying inclusion practices*

Many inclusion practices are referred to in the literature, although their exact characteristics, purpose, or rationale for using one over another remains unclear. For example, D&I training, mentoring, networking (Janssens and Steyaert, 2019) and continuous learning (Gotsis and Grimani, 2016) are cited, however, the impact of D&I training is contested and potentially incurs unintended consequences (Leslie, 2019). Bias-reduction training is one such initiative which may reinforce stereotypes, increase bias, and incite perceptions of undeserved preference and injustice (Noon, 2017; Caleo and Heilman, 2019). Others refer to inclusion practices related to employee engagement, job involvement programmes, information sharing and participation in organizational decisions (Tang *et al.*, 2015) without necessarily specifying how they satisfy inclusion needs. Ortlieb and Sieben, (2014) reveal three areas of organizational practices – fair recruitment and selection, training and development, and social practices, such as meals and parties to provide access to the organization's social world, although, their exact purpose is less clear. In contrast, Brown *et al.* (2020) use the Shore *et al.* (2011) inclusion framework of belongingness and uniqueness to identify seven "practices", which might be described in other literatures as broad concepts. Nevertheless, the practices to which they refer are equitable employment, integration of differences, inclusion in decision-making, information sharing, involvement in informal activities, relational elements of unconditional respect for dignity, and conditional respect for rank and experience. The focus on unconditional and conditional respect may be because the research was conducted in the US military, a power-structured organization, and possibly less relevant to others sectors.

In a review of the literature the most frequently quoted inclusion practices are fostering workgroup involvement (Nishii, 2013), building quality relations (Bernstein *et al.*, 2020), and access to resources and influencing organizational decisions (Nishii, 2013). Nonetheless, there remains a lack of clarity about their exact characteristics, how they may promote inclusion and the expected outcomes, so it remains unclear how they might contribute to the inclusive organization. Equally, the rationale for

choosing between different inclusion practices is unclear, with little understanding of what might constitute appropriate practices. Greater clarity of the aims and outcomes of specific inclusion practices might help organizations create a more inclusive work environment. (Shore *et al.*, 2018; Ashikali and Groeneveld, 2015; Janssens and Steyaert, 2019).

*Influences on inclusion practices*

Studies may not have determined or clarified the precise features and purpose of practices, but researchers have investigated the role of leaders' behaviours and beliefs in delivering inclusion practices (Shore *et al.*, 2018: Mor Barak, Luria and Brimhall, 2021). Studies have empirically tested existing leadership frameworks as inclusive, for example, Gotsis and Grimani (2016) indicate that servant leadership offers competencies that enhance the enactment of practices to foster inclusion, such as helping all employees feel valued and empowered. Other studies prioritise leader/follower relationships with Brimhall *et al.* (2017) suggesting practices that improve interactions between leaders and followers provide lasting benefits in promoting inclusion. Randel *et al.* (2018) introduce a theoretically grounded framework of inclusive leader behaviours; strengthening belongingness through, for example, sharing-decisions and fostering uniqueness by encouraging diverse contributions from individual employees. Both are experienced at the individual level, yet leaders operate at multiple levels within the organization. Veli Korkmaz et al.'s (2022) literature review looks beyond the individual level by advancing Randel *et al's* (2018) framework with two additional dimensions; firstly, showing appreciation by recognising contributions, which operates at individual and team level, and secondly, leaders supporting organizational efforts through alignment of their behaviours and organizational goals.

Nonetheless, a gap persists between articulating and practising the behaviours which facilitate inclusivity (Sherbin and Rashid, 2017). It may be the gap is determined by the extent to which leaders have positive beliefs about D&I, which enable more responsive and varied approaches to promote inclusion (O'Leary and Sandberg, 2017; Gotsis and Grimani, 2016). Varied approaches may also depend upon more complex cognitive capability, where leaders are able to see all individuals with strengths and weaknesses, not identity stereotypes (Randel *et al.*, 2018). This cognitive capability enables leaders to adapt practices for the target group (O'Leary and Sandberg, 2017), indicating practices are malleable.

Despite extensive studies on the inclusive workplace there is a tendency to focus on inclusive leadership, climate, workgroups and perceptions of inclusion, (Shore *et al.,* 2018). Less attention is paid to inclusion practices, which require further study (Sabharwal et al., 2019; Shore et al, 2018). The aim of this qualitative study is to deepen understanding of practices aimed at fostering inclusion within an organization, and answer the research question (RQ): How do D&I Leads use organizational practices aimed at fostering inclusion to satisfy specific inclusion needs?

## Methodology

This paper reports findings drawn from a wider study designed to deepen understanding of practices aimed at fostering inclusion. Here we focus on the perspective of D&I Leads of major organizations, to reveal their strategic organizational views of inclusion. Adopting an interpretivist approach and using semi-structured interviews enabled us to obtain rich descriptions of the approaches taken (Saunders, Lewis and Thornhill, 2019) and to explore the D&I Leads' understanding and experiences of the aims and implications of existing activities and practices to create and maintain an inclusive organization.

### Participants

We were interested in finding examples of good practice in relation to inclusion and therefore wanted to obtain data from D&I Leads from a range of organizations which had a clear commitment to EDI, evidenced by accreditation of the National Equality Standard[1] or similar. We used a purposive sampling strategy (Robinson, 2014) where participants had particular knowledge to act as informants (Saunders and Townsend, 2018), to provide the broadest range of in-depth and information-rich data (Bell *et al.*, 2019). We invited participants who had responsibility for leading the EDI agenda at a senior level within their organizations and experience of actively developing and using practices designed to foster inclusion.  Of the 15 Leads interviewed, nine were Directors and six were Leads or Managers; in reporting our data, all are referred to as D&I Leads. Table I shows the profile of participants by

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[1] The National Equality Standard is the UK's leading diversity assessment framework. See http://www.nationalequalitystandard.com/national-equality-standard/

sector, company size and tenure in their current role. As these interviewees held senior D&I positions, we were able to gather insight-rich individual perspectives, enabling greater in-depth exploration of minor differences to cultivate key themes (Saunders and Townsend, 2018). The strength of this detailed analysis is that it enhances quality and rigour, to optimize the opportunity for transferability of results (Braun and Clarke, 2021).

*Insert Table I about here.*

### Data collection

Prior to data collection ethical approval was obtained from the university and informed consent provided by each participant including details on data security, anonymity and the right to withdraw. Interviews were conducted between June and December, 2021 by the first author. Due to Covid-19 restrictions in-person interviews were not possible, so they were conducted on Zoom. While some nuanced body language more readily observable in-person may have been missed, it may also be that senior participants found Zoom calls more convenient and we gained greater accessibility. Semi-structured interviews helped uncover the nuances of understandings and open-ended questions with prompts allowed interviewees to focus on what they deemed important (Brinkmann and Kvale, 2015) and helped elicit clarity, depth and concrete descriptions and examples (Braun and Clarke, 2021). Participants were asked three main questions. The first question asked for specific examples of practices that fostered inclusion in their organization. This allowed participants the freedom to report initiatives deemed important to them. A second line of questioning explored whether any initiatives had been dropped, which provided the opportunity to reflect on whether they had been replaced with something else. A third topic of questioning focused on the launch of any new inclusion initiatives, facilitating discussion about the status quo and provided revelations about where initiatives were currently focused and why. Follow-up and probing questions in each area allowed the interviewer to capture detailed accounts and explore outcomes, either intended or unanticipated. Interview recordings were transcribed verbatim using Zoom software and checked against the recording and notes taken in the interview, within 24 hours

of the interview, to ensure data accuracy. Saturation was managed by recording new codes as each transcript was coded. At interview 12, saturation of the codes relevant to answer the RQ, was achieved with no fresh codes established (Guest *et al.*, 2006). To strengthen and verify saturation, three more interviews were conducted and analysed, bringing the total to 15 participants.

*Data analysis*

We adopted a thematic approach to analysis, supported by NVivo, to reveal patterns and develop themes about inclusion practices. Familiarization with the data, through cleansing the verbatim transcripts and provisional coding of each inclusion practice, enabled exploration of a wide range of variables (Bryman, 2012). The first and second authors individually reviewed three interviews and provisional coding and discussed provisional intermediate themes. The first author coded further interviews, with regular discussions amongst the research team to discuss and agree intermediate themes based on the purpose of practices. Regular discussion about the data included comparing in-depth interpretations, resolving disagreements and conflicts and examining our biases to minimise the effect of researcher bias. We organised the intermediate themes into three final themes to capture the overarching patterns from the data, encompassing the salient and important elements (Braun and Clarke, 2021) of inclusion practices.

For example, to deepen our understanding of practices aimed at fostering inclusion within organizations two intermediate themes: *Practices to build awareness of under-represented group experiences* and *Developing inclusive behaviours,* were combined and extended as a final theme to include the challenges of the majority group *Inclusion as belonging*. Three further intermediate themes: *Practices provide access to resources, skills and social capital for career advancement*, *Support individuals, through well-being practices* and *Networks as a resource, offering support and to influence EDI policy and processes* all demonstrated support and appreciation of differences rather than differences being valued as a resource. These were combined in a final theme as 'Inclusion as valuing differences'. A sixth intermediate theme *Leader mindset influences behaviours, practices and inclusion*, on further analysis led to *Leaders as enablers or blockers to inclusion* to capture the positive and negative impact on inclusion of different leaders' beliefs and behaviours. Two

intermediate themes were dropped: *The choice of methods used to deliver inclusion varies* and *External events as catalysts of change*. These themes offered interesting insights into the challenges interviewees confronted in fostering inclusion rather than provide additional insight to deepening our understanding of practices which foster inclusion. They were therefore deemed to be out of the scope of this paper.

## Findings

Table II summarises the three themes and sub-themes with relevant quotes. We discuss each in turn but first acknowledge that interestingly only three organizations positioned EDI as a board role. One of these directors spoke of being an "architect" designing the EDI agenda with the leadership team. Other interviewees were more involved in the detailed operationalisation of initiatives.

Insert Table II about here.

### Inclusion as belonging

'Belonging' was often used interchangeably with 'inclusion' and was used as a broad term to characterise inclusive behaviours.

> When you say to a leader, you need to make sure that all your team feel like they belong, there was much more connection with how to be inclusive. I know what it feels like to belong and not to belong and I know what I need to do to be able to deliver that. (Professional services, large organization, Lead 5)

Interviewees prioritised practices that promoted belonging with a primary focus on investment in communications to raise awareness of the challenges under-represented groups must overcome. Most described the use of webinars and newsletters as simple but effective tools to share the stories of under-represented groups, often incorporated into a calendar of events, such as celebrating Pride. Webinars were deemed a powerful way to build empathy and convey the inspirational and compelling stories of under-represented groups.

> Listening to the lived experience of our people, particularly those from diverse backgrounds is highly effective because you can't help but be moved. You can't help but want to make a difference and if you don't, then I kind of

question whether you should be here or not. (Professional services, FTSE 350 equivalent, Lead 8)

Although interviewees spoke of the effect of these communications in terms of the impact on the majority, interestingly they did not comment on the fact they may also have an impact on under-represented groups. Seeing others like themselves may help under-represented groups feel part of a group, and promote psychological safety to enable fuller participation and belonging in the workplace.

Developing inclusive behaviours in the majority group were often addressed through skills-based learning workshops. Experiential learning opportunities were deemed most effective, where participants learn through real-life experiences that provide a context for knowledge. Some involved teams openly discussing experiences of discrimination and learning from each other. Others hosted workshops aiming to promote awareness and change through discussion and learning activities. Here delegates were encouraged to recognise the power of their privilege and the impact of their language and micro-aggressions, the brief and subtle exchanges and biased remarks directed at under-represented groups. One interviewee expressed his ongoing frustration at the apparent lack of shifting mindsets, and talked of wishing he could "do something radical". He gave an example of wanting to take senior leaders from his organization into an under-represented community to experience being in a minority so that they might have some small sense of what it might be like to be part of an under-represented group. Of course, virtual reality (VR) training provides this experience although none of the interviewees mentioned VR.

Take them through an experience that is uncomfortable and then ask about what biases they encountered because we know when people feel it, see it, taste it, they are more likely to change their perceptions. But that's a journey not a one-off training session. (Media, FTSE 350 equivalent, Lead 7)

Experiential learning also provided opportunities for different groups to interact, which helped to build understanding and develop more inclusive behaviours. For example, one organization employing few young black men, partnered with an organization that recruits interns from black backgrounds. Leaders met with interns, in a reverse mentoring partnership, enabling leaders to obtain a deep understanding of their mentees particular work experiences. A secondary gain was that the organization

developed both a commitment to build representation of under-represented groups and created a pipeline of new talent.

Importantly D&I Leads focused, not on 'fixing the individual' but on changing the organization notably through robust recruitment processes to build diverse teams. Nevertheless, few spoke of how to introduce diversity into existing teams. One noted the benefit of such a practice.

> We have invited different people to present papers to the executive, and I think that the senior management benefit by having those different people there. We haven't got as much diversity at the top so they need to be exposed to different types of people. (Education, large organization, Lead 9)

In summary, organizations focused on initiatives to build belonging through awareness and understanding of inclusion. Organizations developed understanding through sharing experiences and views of under-represented groups, team development events and reverse mentoring. Few spoke of orchestrating interactions to help develop interpersonal skills to build quality relationships with diverse individuals.


*Inclusion as valuing differences*

D&I Leads spoke far less about inclusion as valuing differences. In most cases differential investment was made in under-represented groups to provide skills development to help further their careers. Additionally, a few interviewees spoke compellingly about providing career planning tools.

> We're equipping [the under-represented group] to make informed decisions for themselves and set out realistically a five-year career plan, with goals and milestones, so that they're in the driving seat and empowered. (Education, large organization, D&I Lead 10)

Another interviewee spoke passionately about the value of career development workshops recounting the inspiring feedback received from attendees.

> It's almost like a light bulb moment […], 'I'm here, I can do it, somebody's believing in me', giving people that skill, so they can empower themselves to pursue their dream. (Healthcare, large company, D&I Lead 15)

Both of these quotes might inspire under-represented groups to scale barriers to promotion. Although interviewees spoke in terms of career development practices offering support for under-represented groups, these may also stimulate commitment to the organization and a sense of belonging.

Interviewees also referred to supporting the career advancement of diverse employees through providing access to influential social networks which is more difficult for under-represented groups typically excluded from power networks. Sponsorship schemes may appear an obvious solution but one board-level lead, with perhaps more social capital to invest and protect, noted that formal sponsorship is problematic.

> People started saying we're going to put a sponsorship programme in place but you cannot assign sponsorship, no one's going to sponsor me until I prove myself that I'm worthy of you expanding that political capital for me. (Financial Services, FTSE 350 equivalent, D&I Lead 4)

This reinforces the need to create more formal and informal opportunities for interactions between groups, to build trusted relationships.

Others offered career development for diverse groups through secondments to provide new experiences and understandings. One D&I Lead described a formal one-year career exploration programme aimed at ethnic minority groups, to open the possibility of new career paths. A few interviewees outlined comprehensive onboarding programmes designed to integrate new diverse employees into the organization and help build social capital. This individual spoke of a formal induction programme for all new employees.

> [The onboarding programme] you spend six months getting access to all the leaders, now that might happen naturally [if you are] senior but it ensures equity for people who perhaps don't play golf. (Media, FTSE 350 equivalent, D&I Lead 7)

A recent development, reported by three interviewees, was offering support for well-being as contributing to inclusion. Well-being practices, typically aimed at the whole population, supported physical, mental and in one case, before the current UK cost of living crisis, financial health.

> A well-being point of view is very interlinked with an inclusion, for example, promoting breast checks as well as prostate checks. We have well-being champions who talk about physical, mental, and financial health, we provide support to employees in each of those three areas. (Property services, FTSE equivalent, D&I Lead 6)

One D&I Lead spoke of education on mental health where executive committee members shared their experiences of mental ill-health, with the ambition of creating a culture where 'it's got to be okay, to not be okay'. This organization promoted resources as 'here's how you can invest in you, to reach your goals', bringing together health and career goals. Another interviewee talked of the introduction of four well-being days per year, in addition to annual leave. No explanation was required for these days, to help reduce any stigmatization. These interviewees positioned the case for well-being as a vehicle for inclusion but some cautioned that these practices may be "fashionable", used to signal commitment to well-being but not translated into everyday interactions. Another experienced D&I Lead was emphatic that well-being for inclusion was only valid when supported by genuine intent and not performative care.

> A well-being ethos is a lever, by which we drive inclusion, because if you truly are looking after my well-being, I will feel more included. Our metrics won't be how many Fitbits we've sold. (Financial services, FTSE 350 equivalent, D&I Lead 4)

The pandemic and national awareness campaigns may have amplified the concern for mental health and potentially accelerated the interviewees seeing well-being as an inclusion practice. Overall, it was clear these interviewees believed that supporting well-being demonstrates that the organization cares about employees, not just for the role they perform, which enhances a sense of being valued and included.

All interviewees spoke of internal networks for diverse groups, as both a resource to support under-represented groups and to build awareness and appreciation of differences in the organization. Networks may have started as safe spaces to share experiences but had evolved to share their views to influence policy. In a few cases they evolved into 'action groups' empowered to develop action plans, for example, determine a calendar of awareness events and suggest more inclusive recruitment processes but with little power to make structural changes. Networks, when

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empowered to be more "active" are most often used to contribute to HR practices, rather than other strategic goals.

> They [members of the network] will review the shortlisting with the hiring manager, sit on interview panels, collecting the feedback and forcing the inclusive objectives and practices. (Healthcare, large organization, D&I Lead 15)

This interviewee described the black, Asian, minority ethnic group tasked to develop an action plan to influence more inclusive selection practices. The plan included training "ambassadors" in inclusion recruitment practices to provide feedback and "forcing inclusion objectives and practices". Interestingly, a few organizations shared diversity representation data with networks and empowered them to challenge progress on diversity, to hold leaders to account and help drive action. Nevertheless, few harnessed diversity as a competitive advantage to contribute to organizational decision-making. Of those that did, a D&I Lead in a large financial services organization described a young people's forum briefed to identify organizational performance issues and devise solutions. The interviewee was proud to report the group had exerted significant impact in devising new technology solutions. Another, used pulse surveys to involve the entire population, to influence decisions and empower people, for example, in devising new flexible working patterns post lockdowns. This organization was entirely UK-based with two sites, which may make introducing structured processes to harness views of the entire population easier.

> We're running more pulse surveys and people can really influence decisions. Before, it felt a bit like we were asking you, but not really influencing decisions. But now we're not just asking, decisions are influenced. I think people feel more empowered and they know that it's worth sharing their views. (Education, large organization, D&I Lead 9)

Despite organizations prioritising practices that promoted inclusion through belonging, some practices demonstrated that differences were valued. The creation of diversity networks, well-being and career planning interventions were used to demonstrate that the under-represented groups were appreciated and supported.

Yet, inclusion practices are inexact. They may provide multiple and different inclusionary experiences. Practices may be designed to provide support and appreciation of differences whilst at the same time promoting a sense of belonging.

*Leaders as enablers or blockers*

The issue of leaders as either enablers or blockers of inclusion has very pertinent implications for practitioners. Interviewees acknowledged the necessity to dismantle structural barriers to change but noted that the leader mindset and commitment to EDI determined success.

> It's getting [leaders] to understand they can be enablers or blockers. It's getting them to understand that in every single thing that they do, throughout the employee lifecycle. (Energy, large organization, D&I Lead 3)

'Blockers' were described as showcasing issues such as raising the Pride flag, whilst accepting sponsorship from countries that criminalised LGBT people. Other blockers included seeing inclusion as a passing trend, for example, one D&I Lead in frustration reported an executive's response to Black Lives Matter and increasing black representation as 'When is this all going to be over?'. This displays a stubborn indifference. Another device used to resist change was commercial success.

> Maybe their area of the business is so successful, they may feel if I change then it's not going to be positive for me. I'm doing really well, so why would I need to change. (Professional services, large organization, D&I Lead 5)

Most interviewees described 'enablers' in terms of relational inclusive leadership behaviours, such as acting collaboratively, also valuing and empowering everyone to share their views, features of servant leadership. Enablers had honed their affective and cognitive skills, were being authentic, empathic and actively promoting inclusion. Interestingly, one discussed power-sharing, although, as sharing-privilege rather than in relation to sharing information and decision-making. Nevertheless, the evolution of the EDI agenda was presented as moving from regulatory frameworks and compliance, to focus on the mindset of the leaders, to create a 'movement' for inclusive change.

> Fundamentally it's working because senior leaders choose to make it so. There is a very, very clear difference between a leader genuinely believing this, so that every single day he or she shows up in every meeting, and takes

every opportunity to make an impact, they have a D&I lens on them. (Professional services, FTSE 350 equivalent, D&I Lead 8)

Unsurprisingly, most interviewees spoke of the challenge involved in changing leadership behaviours which necessitated mindset change. One interviewee from a large retail organization, spoke of the value of Dr Carol Dweck's motivation theory to help leaders become more self-aware. Dweck's theory proposes that mindset has an impact on how challenges are approached, described as fixed or growth mindset. One self-aware D&I Lead recalled that in-spite of his 16 years leading EDI he still challenged himself.

I still hear a lot of 'this person has a cultural fit, they would fit in perfectly'. But I was interviewing someone the other day and they were so disruptive and I left and thought no. But then I realised that they would keep me on my feet. And it's that kind of thing, how do you change that culture or mindset? (Media, FTSE 350 equivalent, D&I Lead 7)

This D&I Lead challenged himself to move beyond a 'culture fit, to culture add' mindset and changed his behaviour. Others might have maintained the 'culture fit' stance fearing the disruption, and possible loss of control or power.

Naturally, challenging senior leaders may cause tension, yet injecting this tension, confronting 'uncomfortable truths' was deemed necessary to build awareness and change. Most spoke of the importance both of using the data and the CEO sponsoring the agenda but only the board level D&I Leads described challenging senior leaders.

We treat our diversity goals as seriously as our growth goals [....] but this can lead to uncomfortable conversations. This gets into fascinating debates about How far do you push goals of D&I and growth? Do we consider that we should slow growth down to ensure that our diversity goals are reached? And those are good, constructive healthy conflicts and debates. (Professional services, FTSE 350 equivalent, D&I Lead 8)

This demonstrates how the best organizations position their D&I goals alongside their growth goals at a strategic level. Reassuringly, interviewees also spoke of deep structural barriers to change. One interviewee reported their organization had felt it had a strong 'meritocratic' culture, but an external consultant identified it as gendered,

from the organizational processes, to the leadership attributes that external consultant was able to:

> Take them on that journey so that their eyes are opened and they can start to understand what being truly inclusive means. (Professional services, FTSE 350 equivalent, D&I Lead 8)

A strong commitment to inclusion requires a fundamental reshaping of the structure, processes and practices in an organization. This can only happen if the top leaders embrace the challenge and treat D&I as being as important as growth and sustainability goals. Our data indicate that the pursuit of the inclusive organization was driven by the opportunity to enhance the organization's reputation, to attract and retain staff and clients, to improve organizational performance and future-proof the business.

## Discussion

Our study advances knowledge of practices that foster inclusion, beyond the current focus on identifying practices, our findings deepen understanding about how organizational practices aimed at fostering inclusion are used to satisfy specific inclusion needs. We draw on Shore et al.'s (2011) conceptualisation of inclusion as treatment that balances individuals' social need for belongingness and the individual need to have one's uniqueness valued, noting that extant literature pays less attention to understanding practices that may foster inclusion (Shore *et al.*, 2018; Bernstein *et al.*, 2020). First, we expand on our theoretical contributions, and we then consider practical implications.

We contribute to theory by expanding knowledge of inclusion practices and how they satisfy inclusion needs. We expand knowledge of inclusion practices by articulating the specific practices employed by our sample of D&I Leads in the study. Findings clearly demonstrated that the D&I Leads prioritised the need to belong over the need to be valued to the point where 'belonging' was used interchangeably with 'inclusion'. The D&I Leads were more comfortable talking about belonging perhaps because this is a basic human need. Practices aimed at increasing belongingness largely focused on communications and training situation in which members or under-represented groups could share their experiences with the majority. This helps

the majority to be more aware of how they can engage more effectively with under-represented groups.

D&I Leads spoke far less about their inclusive practices aimed at valuing individual differences. Wanting to be valued for the 'differences' one brings may not be an issue for the majority in the organization where they can take-for granted that their contributions are recognised and valued. This may explain how D&I Leads seemed to overlook that these practices might also have a positive effect on the under-represented groups by helping them feel heard and valued as well as holding up role models for them. Where they did offer examples, they tended to be focused on various career development programmes. The ways these conversations were framed felt like the organization recognized the need to give special help to members of under-represented groups. This might imply that they needed 'fixing' in some way to help them fit in. This association needs to be carefully managed, to leverage such important programmes appropriately and ensure sufficient emphasis is maintained on the need to make changes to the policies and processes which may, perhaps unintentionally, discriminate against those in under-represented groups. On the other hand, some D&I Leads referred to these career development programmes as "differential investment" to redress the balance of the historical structural advantages enjoyed by the majority. A further benefit is that the participants on such programmes, may also feel that they have found a 'home' - a community safe place and sense of belonging. Nevertheless, the literature discusses valuing diversity in terms of being a resource, where inclusion leverages the advantages of a more diverse workforce through greater creativity, improved role (Shore et al., 2011; Mor Barak et al., 2016) and organizational performance (Sabharwal, 2014). Interestingly, the UK Financial Conduct Authority (2023) proposes that firms should report annually on employee responses to six inclusion measures, one of which is 'their contributions are valued and meaningfully considered", yet D&I Leads rarely discussed valuing differences in this way.

The study was undertaken during the Covid-19 pandemic and periods of lockdowns, so it is not surprising that many D&I Leads were focused on the need to address well-being. Our impression is that whilst the well-being initiatives were driven by a general need to support all employees, it presented an attractive way to customize offerings for different groups. Well-being practices, therefore, emerged as very important to help recognize and support individual differences at work whilst

also promoting feelings of belonging. Thus, we extend the literature by showing how practices may satisfy needs for both belonging *and* having one's differences valued.

A further, theoretical contribution is that our findings reveal well-being and career development as inclusion practices, unlike the extant literature that sees them as outputs of inclusion (Veli Korkmaz *et al.*, 2022; Shore *et al.*, 2018). The literature sees well-being (Shore *et al.*, 2011) as an output of workgroup involvement which reduces conflict. Similarly, Gotsis and Grimani (2016) propose that servant leadership behaviours promote an inclusive workgroup climate, leading to psychological well-being. It seems logical that a conducive working environment promotes well-being but we find that well-being practices are used as a means to promote inclusion, indicating that well-being is an input of inclusion. Literature also suggests that organizations committed to inclusion will create development and promotion opportunities for diverse talent, or the 'expansion of talent' (Shore *et al.*, 2018, p.186), positioning this as an output of inclusion. Although, we agree that inclusive organizations are more likely to create career opportunities for under-represented groups, we find career development practices are used to support under-represented groups and as a means of appreciating their different experiences. We accept well-being practices may have accelerated as an inclusion practice due to amplified concerns for mental health during lockdowns. Nevertheless, in recognising that well-being and career development practices offer support and appreciation they meet the need of valuing differences and we argue they fulfil an important role in fostering inclusion and should be enduring practices. We propose that well-being and career development practices are potent inclusion practices, re-positioning them in the Shore et al. (2018) inclusive workplace model as both inputs and outputs of inclusion.

Involvement in decision-making is frequently cited as an inclusion practice in the literature (Nishii, 2013) but we find a lack of empirical support for this. The literature indicates that participation in decision-making enables the individual to feel part of the organizational system (Mor Barak, 2015; Shore *et al.*, 2018; Bernstein *et al.*, 2020) and included. We find little evidence of these practices, but recognise the practical problems, from developing decision-making skills, to decisions taking longer (Young and Jones, 2020).

Our findings highlight practical implications showing that practices are not fixed, nor are they uniformly implemented, but depend on the leaders involved and their commitment to EDI. Leaders are responsible for operationalising inclusion practices (Mor Barak *et al.*, 2021) with several studies arguing that the leaders' cognitive ability and beliefs about the value of EDI, impact upon how inclusion practices are adapted by leaders to meet individual needs (O'Leary and Sandberg, 2017; Veli Korkmaz *et al.*, 2022). Our sampling strategy involved focusing on a range of organizations with a clear commitment to EDI, and the D&I Leads discussed practices to build leaders' diversity awareness and shift mindsets to help develop inclusive behaviours. Other organizations could usefully adopt similar activities. Leaders were described as 'enablers' or 'blockers', with enablers typified as collaborative. Further we find that the seniority of the D&I Lead is symbolic of organizational commitment to EDI and facilitates transition to greater inclusion. We find that the board-level D&I Leads were better able than the other Leads to hold senior leadership to account, challenge progress and inject tension into discussions to facilitate change. Organizations must continue to show accountability for EDI being held to the highest levels of management.

*Limitations and conclusion.*

This qualitative study expands our understanding of inclusion practices and how they are not uniformly implemented, with some limitations. Participants were senior executives, responsible for designing EDI strategy and practices and may well have been biased towards their individual preferences and practices they had designed and implemented within their organizations. Despite these possible biases we were able to explore a broad range of practices to understand how they may meet inclusion needs. For practitioners, we help identify actionable inclusion practices, to aid retention and help advancement of under-represented groups. A pertinent finding is that leaders may act as either enablers or blockers of inclusionary practices, thus, any study of inclusion practices should consider how practices are malleable, through the actions of leaders within the organization. Although we find satisfying belonging needs are prioritised over valuing difference, future research could usefully investigate whether employees prioritise inclusion practices in the same way. We would also recommend that research should explore specific practices that employees

experience as inclusive. This would deepen understanding of how practices satisfy inclusion needs to foster organizational inclusion.

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| D&I Lead | Sector | *Organization Size | | | Tenure in current D&I role | | |
|---|---|---|---|---|---|---|---|
| | | FTSE 350, or equiv. | Division of FTSE, or Large Business | SME | 1-5 | 6-10 | 11+ |
| 1 | Professional services | | | X | | X | |
| 2 | Property services | | X | | X | | |
| 3 | Utilities | | X | | | X | |
| 4 | Financial Services | X | | | | X | |
| 5 | Professional services | | X | | X | | |
| 6 | Property services | | X | | X | | |
| 7 | Media | X | | | X | | |
| 8 | Professional services | X | | | | X | |
| 9 | Education | | X | | | | X |
| 10 | Education | | X | | | X | |
| 11 | Retail / Leisure | X | | | X | | |
| 12 | Financial Services | | X | | | X | |
| 13 | Retail/ Leisure | | X | | | X | |
| 14 | Health | | X | | X | | |
| 15 | Health | | X | | X | | |
| Total | | 4 | 10 | 1 | 7 | 7 | 1 |

**Key: *Organization size**
FTSE 350 or equiv.: An organization listed in the UK FTSE 350, or of an equivalent size
Division of FTSE 350, or Large Business: An organization that is a division of a FTSE 350, or a large business, with 250 or more employees (Gov.uk., 2022)
SME: a small or medium sized entity, up to 249 employees (Gov.uk., 2022)

*Table **Error! No text of specified style in document.**I Participant profiles*

# UNDERSTANDING PRACTICES WHICH FOSTER INCLUSION: VIEWS FROM THE TOP

*Table 0.2 Summary of findings: themes, sub-themes with quotes*

| Theme | Subtheme | Quotes |
|---|---|---|
| **Inclusion as Belonging** | Belonging in action | It's not really about inclusion purely, it's more like 'I feel a sense of belonging'. For instance, 'I feel free to challenge the way things are done here', 'I feel supported to look after my health and wellbeing', 'I feel empowered to make decisions regarding my work', 'I have good opportunities to learn and grow'. (Healthcare, large organization, Lead 14) |
| | Raising awareness amongst the majority | We're taking a diverse group and looking at how can we as individuals and leaders be inclusive to these different groups with a focus on practical advice. For example, we've had two directors talking about racism they've experienced. It's the age old thing what gets talked about gets done. But it's really raising people's awareness. (Energy, large company, Lead 3) |
| | Keeping the majority engaged and accountable | Those groups that are under-represented may be supported but if the majority doesn't change its view, they're always going to be under-represented because they're always coming up against the privilege of the majority. I think it's about not being afraid to continue to have the conversation, even if you only had it last week. People in the majority group are getting bored because it doesn't impact their daily lives. How do we make it so that they are engaged? Because that's the only way the change comes, it's not the minority group. (D&I Manager, FTSE 350 equivalent, Lead 6) |
| **Inclusion as valuing difference** | Social capital | It's giving skills around social capital, about how you get out there and be visible, the skills that are not taught. We know and research tells us, that those from under-represented groups don't have the same visibility. or aren't able to create the visibility. It's that kind of advantage we are trying to put in place, to create equity for those groups. (Media, FTSE 350 equivalent, Lead 7) |
| | Well-being. | People are at their best when they feel psychologically safe, linked strongly to mental well-being and feeling included. Hopefully people have psychological safety at home and we can replicate that at work. When people are psychologically safe, you see it in people's performance, it impacts their confidence, collaboration, creativity and productivity. It's not only the morally right thing to do, it's also highly commercial and impactful. (Professional services, FTSE 350 equivalent, Lead 8) |
| | Role of employee networks | Once a gender network Lead cornered me and said, *The head of this business unit wants us to write a strategy on how to recruit more women*. And I said *Well he's wrong, that's not your job and actually it's unfair to ask you to do that. Now asking you as a network to work with our resourcing team to figure out how we bring more women into the pipeline, how we leverage your network because your network as a woman is different from theirs; that's different*. As soon as you realize where the responsibility sits, that's how you drive the change. (Financial services, FTSE 350 equivalent, Lead 4) |
| | Structural barriers: formal and informal | A previous researcher told us, *Your processes are gendered, your language is gendered. The way your leadership speak about the attributes wanted from new executives is generally gendered. You're forgetting that an awful lot of an individual's progression happens* |

## UNDERSTANDING PRACTICES WHICH FOSTER INCLUSION: VIEWS FROM THE TOP

| Theme | Subtheme | Quotes |
|---|---|---|
| **Leaders as enablers or blockers** | | *outside of a formal process, it's the informal access to networks to sponsors, to the right sorts of work.* We've been swimming against this tide for a long time without knowing what tied us to these invisible barriers. This lack of awareness, these unhelpful and limiting beliefs about success, that's the barrier, that's slowed us down. (Professional services, FTSE 350 equivalent, Lead 8) |
| | Leaders acting on data | It's having the data to get the picture of what your workforce looks like from a diversity and inclusive perspective. If the picture is not diverse you have to ask questions and start to glean at the strategic level meaningful targets. It injects a particular focus and drives conversations and it starts to affect a change. It takes time but because the data is there, you're able to not only just see, *Wow progress has been made*, but also be able to challenge an area to say, *Well we've had this conversation, for the last two years and I'm not seeing anything different. Well what are you doing about it, actually that's your objective, this year, you need to do X, Y, and Z*. (Education, Large organization, Lead 10) |