**Include Who? A No Holds Barred Discussion Across Industries and Cultures**

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**Purpose:** The goal of this paper is to report what it took for two very different organizations to aim for a truly inclusive meritocracy that reached across geographic borders and multiple cultures. Using the lens metaphor of theory, we discuss selected human communication theories and leadership principles to describe why things happened the way they did, successes and failures. An in-depth discussion detailing the strategic efforts taken for moving the organizations through the necessary steps to become an inclusive organization lies at the heart of the research project.

How practice informs theory is jolted forward by addressing a by-product of the ‘labeling theory’. “What is” and “who are” concepts are scrutinized and juxtaposed against the ‘power’ dimension of what is cultural, who are the “insiders” versus “outsiders,” “who’s” inclusive behaviors are or should be the dominant ones? ‘For-profit’ and 'non-profit’ organizational lessons are key elements of the discussion. The “for profit organization” is represented by a former senior executive sharing their gloves off approach to what took place in bringing a global entertainment media organizations to a state of intercultural competence. On the “non-profit front,” represented by a Vice President, we advance the position of how a community based organization, Safer Foundation, uses inclusive leadership practices to address the effects of mass incarceration.

**Keywords**: *diversity, inclusion, power, culture, nonprofit, for profit, organizational development, communication theory, leadership theory, nonprofit, for profit*

**Introduction**

Equality, diversity and inclusion are concepts that are often requested of practitioners to bring forward within their organizations in response to internal initiatives and/or external forces. Academics teach theories of human communication, organizational psychology, management tactics and leadership principles to hundreds of thousands of students every year, around the world, yet when these students are hired they fail to grasp or observe these dynamics in the context of a corporate or organizational structure. In other words, theory and practice have long been taught but as separate subjects therefore the merits of these connections have gone unnoticed. Marrying the skills of a communication anthropologist, corporate trainer, global human resources executive and organizational development expert allows us to engage discussion on how the intersection of theory and practice can be facilitated by the scholar-practitioner.

We seek to draw lessons from organizational experiences and compare the application of theory across two organizational landscapes. These experiences were selected to act as a vehicle for describing the discourse for intentional leadership practices that will result in a more diverse, equitable, and inclusive organization.

This paper begins by situating theories and principles that were utilized to examine our understanding of equality, diversity, and inclusion in two distinct organizational settings. Many theories of human communication and leadership principles could have been selected to serve as a foundation for describing support of inclusive leadership practices, begging effective understanding of diversity in the workforce. However, four communication theories and four leadership theories and principles are highlighted here as they are taught across college campuses in the USA and other countries at the sophomore level up and built upon through graduate and doctoral programs. Following a review of these relevant theories, we provide brief organizational vignettes to exemplify these concepts in practice and link their practice through a comparative analysis of common threads and/or unique demonstrations of inclusive leadership. Additionally, key leadership principles embodied in transformative leadership are advanced as it is the leadership of individuals in organizations that ultimately makes an inclusive workplace.

**Background**

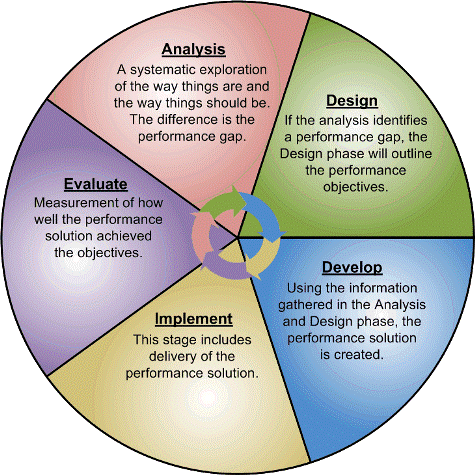
**Communication Theories, Diversity and Inclusion Overview**

Much of today’s training literature suggest the importance of human communication theory and practice but fail to discuss the need for the understanding of solid communication research, methodologies and practice (Arai, Wanca-Thibault, and Shockley-Zalabak, 2001). The communication theories often connected to and associated with culture are: speech codes theory, communication accommodation theory, standpoint theory, and muted group theory. There are a number of other theories that could also be reported here that would support our work, but we are limiting this paper to the four we feel are most appropriate. In other words, a real theory to practice, how-and to conversation is added to the global discussion. The research question addressed is: *how can the academic apply basic communication theories and leadership principles to inclusion efforts in a practicing environment?*

Speech Codes Theory

“Speech codes theory” refers to a framework for communication in a given speech community. Gerry Philipsen influenced by Dell Hymes, a noted linguist and anthropologist, is credited with putting forth this theoretical frame. In his work he advances the concept of insider-outsider language and proposes six tenants (propositions) of speech: 1) Wherever there is a distinctive culture, there is to be found a distinctive speech code, 2) In any given speech community, multiple speech codes are deployed, 3) A speech code involves a culturally distinct psychology, sociology, and rhetoric, 4) The significance of speaking depends on the speech codes used by speakers and listeners to create and interpret their communication, 5) The terms, rules, and premises of a speech code are inextricably woven into speaking itself, and 6) The artful use of a shared speech code is a sufficient condition for predicting, explaining, and controlling the form of discourse about the intelligibility, prudence, and ,morality of communication conduct. (Griffin, 2012)Speech code theory is also referred to as an ‘ethnography of communication’. An ethnography of communication, in its simplest form, describes the way a culture communicates. This is studied both intra- and inter- culturally, sharing the emic and etic perspectives. The tools of the communication anthropologist begin with the skills of observation. Essential to an accurate understanding of organizational communication is knowing what is going on, what is missing and what should be happening.

Both case studies discussed herein have relied upon these propositions. Critical ethnographic research was done in order to accurately respond to the behavioral gaps in the work place. Training and development lingo would call this the “needs assessment” stage. This discipline’s long held and followed acronym, the ADDIE model, is easily mapped because of the lessons from the speech codes theory. ADDIE stands for: Assessment, Design, Development, Implementation, and Evaluation. No one person is credited with this acronym as it a generic process that instructional designers use in the workplace.



<http://www.addiesolutions.com/addie.htm>

Communication Accommodation Theory

Communication accommodation theory (CAT) was developed by Howard Giles. It argues that “when people interact they adjust their speech, their vocal patterns and their gestures, to accommodate to others. This theory assumes that people bring in their backgrounds and fields of experience into their interactions through their speech and behaviors, and that therefore speech and behavioral similarities exist in all conversations. It also assumes that accommodation is influenced by the way in which people perceive and evaluate what takes place during a conversation, that is: how people interpret and judge the messages exchanged in conversation.

Dr. Mahzarin Banaji, a Harvard social psychologist, studies how people think, and how they think they relate to one another. She introduces us to the term, “mind bugs” which is an appropriate tie in to CAT. Mind bugs are biases that we all have. Biases inclusive of race, age, gender, and other territories of ‘otherness’. Mind bugs operate all the time as they are located in our unconscious responses to other people. Banaji states, “Social biases are not that different from perceptual biases, …people demonstrate similar blindness in their judgments of other people, ignoring the information that does not fit into their existing “theory.” (Lane, Mitchell, Banaji, 2005.)

Connecting CAT with work around unconscious social biases or ‘mind bugs’ are important elements to include in corporate training programs, executive coaching sessions and diversity awareness level meetings. Understanding the way a person views or behaves to ‘otherness’ is revealed through their communication behaviors.

Giles claims that when two people from different ethnic or cultural groups interact, they tend to accommodate each other in the way they speak in order to gain the other’s approval. Mind bugs may prevent or support these connections, leading to accuracies or inaccuracies. What is special about Giles’ work with CAT is that he focused on the nonverbal aspects of communication. In high context and indirect cultures this is critical to inclusiveness training. The practitioner assigned to help create an inclusive workplace will need to be well-versed on the positions this area of theoretical research tells us.

Standpoint Theory

Standpoint theory is a postmodern method for analyzing inter-subjective discourses. This theory is mainly about an authority which is generated by people's knowledge and the power to shape people's opinions in daily life. Standpoint theory's most important concept is that individual's own perspectives are shaped by his or her experiences in social locations and social groups. Standpoints are always involved in more than one part. For example, if there are two African American men in a group, their standpoints may be similar in terms of race and sex categories; however, if their economic status is different, their standpoints are not completely the same. These perspectives are the core point of view how for individuals see the world.

Understanding and applying this theoretical lens nicely opens and closes any discussion around stereotypes and profiling. Whereas the practitioner must include sensitivity awareness in any training that begs of inclusiveness of ‘otherness’, it should be directly pointed out the need for a full stop if the conversation shifts to providing an explanation for why stereotyping is good. Stereotyping is a never an appropriate response for being inclusive due to gross inaccuracies that may be associated with them. Cross cultural due diligence teaches generalizations based on solid intelligence that is dynamic, as is culture. The standpoint theory helps to describe and explain this from a communication or behavioral perspective. The scholar-practitioner is well served incorporating these manifestations in to any training design associated with diversity and inclusive training.

Muted Group Theory

Muted group theory (MGT) developed out of the cultural anthropology field, but more recently developed in communication mostly as a feminist and cross-cultural theory is included for its merits in assisting with helping groups understand why it is necessary to consciously seek out cultural difference and be mindful of everyone’s behaviors. Muted group theory helps explain communication patterns and social representation of non-dominant cultural groups. This includes people where English is the primary language spoken yet there is also a second language. Theorist Kramarae states, “The language of a particular culture does not serve all its speakers equally, for not all speakers contribute in an equal fashion to its formulation. Women (and members of other subordinate groups) are not as free or as able as men are to say what they wish, because the words and the norms for their use have been formulated by the dominant group, men (Griffin, 2012).

Equality, diversity and inclusion are by-products of muted group theory. In cultivating a global mindset where equality of people, diversity of thought and inclusion of all is necessary, it is must to understand the ramifications of the presence of muted group dynamics. Language is a human-made construction. Where certain “others” words and thoughts are marginalized and/or ignored. This sets up inequality and discrimination based on power and privilege. In the US, this is very evident along racial lines as it is easy to underestimate the power of “white privilege” in the workplace and marketplace. The real question then is, who is right? Who should define what we wish to be included in to? Does the dominant culture set the stage for what is correct and proper? Muted group theory brings to the forefront the dialogue about who should be the gatekeepers of communication. Although, MGT was primarily developed based on male-female culturalisms, it can also be applied wherever you have an insider - outsider relationship present.

**Diversity Management at the Crossroads**

Increasingly, authors are finding the field of diversity and inclusion to be at an important juncture in the development of its practice. Thomas (2010) feels that the field is at a turning point and suffers from diversity fatigue. This fatigue is characterized by the following elements: weariness with diversity management being used as a tool for social justice and human rights; a lens where diversity is viewed as a problem; recognition that it has often failed to result in organizational change; and given the institutionalization of diversity management practices in corporate America, a sense that advocacy is no longer necessary. In “*The Loudest Duck”* (2010), Laura Liswood speaks to the unconscious archetypes and beliefs that hold organizations back from being successful in their diversity practices. Ross (2010) observes that for the last 25 years, diversity programs have failed because people feel alienated due to race, language, gender, sexual orientation, ethnicity, culture. Many of these exclusions are both unconscious and unintentional. It is necessary now to challenge our preconceived notions about diversity. *“ReInventing Diversity: Transforming Organizational Community to Strengthen People, Purpose, and Performance”* seeks to inspire us to act beyond the status quo by expanding inclusion – “creating opportunities for people to be a part of the fundamental fabric of the way the organization functions – decision making, responsibility, leadership – then creating organizations that are culturally competent, culturally intelligent and culturally flexible”(Ross 2010, p. 34). There are three paradigm shifts that are required to fulfill the promise of inclusion:

1. *Transforming Cultural Competency into Competitive Advantage* – ability to systemically anticipate, recognize, and respond to varying expectations, customers, clients, co-workers of diverse backgrounds
2. *Responding to Bias* – There is a limiting belief that bias is a bad thing, it sets up a good person - bad person or us versus them dynamic. Believing in diversity and inclusion doesn’t make it happen. It is necessary to take responsibility for our bias and become aware of why we see the world as we do. Further, we have to move beyond our assumptions that within our social structure that we all have free choice.
3. *Move from Events-based to Culture-based Systems Change* – it is important to pay more attention to organization culture and community and the systems in place than to look for discrete things to do.

“Leaders lay the foundation for sustained excellence when they create cultures that invite and embrace the contributions that emerge from diverse perspectives and backgrounds” (Davidson 2011, p. 193). The importance of CEO commitment has been a staple of large-scale organizational change efforts including workforce and supplier diversity programs.

**Transformational Leadership, Diversity and Inclusion**

An organization’s capacity to adapt and capitalize upon cultural differences is, in large measure, a function of leadership and that leadership will shape the overall culture of the organization. James MacGregor Burns (1978) seminal work on leadership defines three types of leadership. Transactional leadership occurs when leaders approach followers with an eye toward exchanging something (economic value, political value, or psychological value) of value or another. Transforming leadership “occurs when one or more persons engage with others in such a way that leaders and followers raise one another to higher levels of motivation and morality” (Burns, 1978; p. 20). Transcending leadership occurs when followers are activated and become leaders themselves. Burns work on leadership is foundational especially his conception of transformative leadership. He identifies four factors that characterize transformational leadership:

*Idealized influence* – high moral standards leading to trust

*Inspirational motivation* – vision for the right thing along with a charismatic influence

*Intellectual stimulation* - challenges individuals to generate creative solutions and question basic assumptions

*Individual consideration* – each individual valued as a unique contributor

Bass (1985) along with Bennis & Nanus (1997) build upon Burns’ work to extend the concept of transformative leadership. Bennis & Nanus speak to the relationship aspects of leadership. They describe transformational leadership as: *Collective* – interplay between the wants and needs of followers and leader’s ability to understand these aspirations. *Causative* – invents and creates institutions that empower employees to meet their needs. *Morally purposeful* – choose purpose and visions that are based on the key values and social architecture of the organization. These features move followers to higher degrees of consciousness.

For Rost (1993) the essential ingredient of leadership flows from the notion that leaders and followers intend real changes – he argues that although the essence of Burns transformational leadership is bringing about real change, his broader work on leadership does not deal adequately with the intentionality of change but more with leadership as a reciprocal process (transactional) and such bargains often promote the status quo. “Leadership is a relationship wherein leaders and followers intend real change” (p. 114). Rost expands this test of leadership in *Leadership for the Twenty-First Century* when he argues that

Real means that the changes the leaders and followers intend must be substantive and transforming. Real means that leaders and followers intend changes in people’s lives, attitudes, behaviors and basic assumptions, as well as in groups, organizations, societies, and civilizations they are trying to head” (1993, p. 115)

Tichy & DeVanna (1990) direct their attention to the transformation of corporate communities facing the fierce competitiveness exhibited in our global marketplace. In doing so, they find that the key to successful institutions will be the capability of these organizations to continually transform themselves or adapt at all levels to an accelerating marketplace. They state that transformational leadership “…is about change, innovation and entrepreneurship. It is a leadership process that is systemic, consisting of purposeful and organized search for change, systemic analysis and the capacity to move resources from areas of lesser to greater productivity Tichy & DeVanna find that leaders must deal with the organizational and individual tensions of a major transformation. Leaders do this by creating organizations that embrace paradox. These tensions include:

* Between stability and change
* Between denial and acceptance of reality
* Between destruction and the hope of rebirth
* Between the manager and the leader (maintenance and change)

Tichy & DeVanna advance two concepts that seem important to leaders in these complex environments – *“planful opportunism”* and *“creative destruction”.* “Planful opportunism is the ability to turn unpredictable events into building blocks of change” (1990 p.94) and setting the stage for vision creation. They describe creative destruction in this way:

All of us are enmeshed in vase webs of social relationships that define who we are as well as who others are in relation to us. The transformational leader must creatively destroy and then reweave the system of social networks to create meaningful change. (p. 188)

However, this ability for organizational self-renewal is difficult. The authors observe, “Sensing the right time to reinvest, initiating the creative-destructive forces necessary to transform an organization is an ability that few leaders and few institutions nurture” (p. 263). If this is the case, what does that mean for the reemergence of diversity and inclusion initiatives?

**An Inclusive Leadership Model Discussed**

Inclusive leadership (Ospina, El Hadidy, & Caicedo, 2011) is the practice of leadership that carefully includes the contributions of all stakeholders in the community or organization. Inclusion means being at the table at all levels of the organization, being a valued contributor and being fully responsible for your contribution to the ultimate result. Inclusive leadership creates an organizational culture that consistently produces results that benefit all of those stakeholders*.*

To ground our understanding of diversity practice, it may serve us well to use the “Diversity and Inclusion Journey” model developed by Joerg Schmitz, a noted corporate anthropologist, that has been successfully used with numerous large multinational organizations. This ‘Journey’ model is often viewed by US diversity and inclusion experts as a “typical model” which highlights the most commonly accepted approaches to building organizational diversity and inclusion practices.

*Stage 1-Introduction to Diversity*

Most organizations begin their diversity and inclusion journeys by stating overtly the business case for diversity and enrolling all stakeholders and employees in understanding why the organization is establishing this business imperative. Diversity mission statements are created and an assessment of the organizations demographics help to determine a baseline population. Often there is an outside force or a government regulated requirements, such as Affirmative Action or the Equal Employment Opportunity Commission (EEOC) in the United States, which serves as the impetus for many initial commitments to diversity work. At this stage, basic diversity awareness is required which includes addressing misconceptions or false assumptions about people that are different from each other. Earlier we referred to this as ‘otherness’.

*Stage 2-Driving Change*

Once the first task of defining that diversity matters is established, an organization must shift its focus to driving individual behavioral change, and assessing the corporate climate to determine how to create and sustain these behavioral changes. Key leaders must embark on change management projects to recognize and reward inclusive leadership behaviors, and to identify and drive out exclusionary practices in the organization. Training and personal development agendas which provide learning on appreciating differences and valuing diversity are utilized effectively at this stage.

*Terminology Explained – Diverse People*

A word here about “diverse” people. There is no such thing as a ‘diverse person’. In order to have ‘diversity’, you must have at least two people as ‘diversity’ cannot exist in a lone personhood. Often, the arrogance or ignorance of people will make the comment, “I need a diverse person on this team,” or ‘go look for a diverse person’. Although, the spirit of this terminology may be positive and have a well-intended meaning, it smacks of an ill-informed person. (Edmondson, Gupte, Draman, and Oliver. 2009)

*Stage 3-Inclusion*

This stage marks the organization’s progress from a concentration on the demographics of diversity to the crafting of an inclusive workplace which encourages all employees to contribute to their fullest potential. The organization recognizes the hidden power of ‘differences’ and works to remove barriers and practices that dissuade differences from being leveraged. Leaders create and foster a quality of inclusiveness within the organization that is necessary to turn diversity into an organizational asset. Awareness programs with experiential learning help organizations to spearhead inclusion efforts and compel leaders to move to action.

*Stage 4-Cultural Competency*

As organizations extend beyond the geographic borders of their home countries and begin to compete globally, they recognize a need to move beyond the demographic components of diversity and promote a more globally inclusive leadership mindset. In order for leaders to manage more effectively, they need to consider how to include all members of a team, despite cultural bias or assumptions held by others. Leaders need to learn how to manage and motivate multicultural teams and overcome gaps in communication both verbal and non-verbal. Leaders with strong cultural competency skills will strengthen credibility, communications, and relationships as they face the advent of globalization. As organizations look to attract and manage global talent and develop global leaders, cultural competency becomes the fundamental skill set required to build an inclusive and globally integrated organization that drives innovation and growth.

Cultural competency is the process of enhancing self-awareness and creating ‘other-awareness’ as we leverage an understanding of cultural knowledge. It is the acknowledgement that differences across cultures exist and can be understood with a goal towards bridging the differences in a respectful, non-threatening way and forming operational agreements that reflect the mutual adaptations each party makes to meet the other halfway.

*Stage 5-Leveraging Diversity and Inclusion*

Many organizations have been striving to make progress on the diversity and inclusion front for decades, and some have arrived at the place where they question,” What’s next?” Corporate and academic institutions alike must continue to grow and innovate to sustain. An executive decision-making body with a diverse set of perspectives and experiences is essential for the creation of new ideas and innovation. Workshops and self-study are utilized to promote awareness and adoption of these principles.

**Organizational Case Stories and Discussion**

It may appear as if it is a long road from theory to practice, from scholar to practitioner, or research to corporate work, but in actuality it is much clearer than one may think. We turn next to a discussion of two organizational cases: A “For-Profit” corporation and a “Non-Profit organization, each with significant dealings with ‘otherness’.

**Case One – The Field Experience of a Global Software Development Company**

How does a global high-tech corporation (hereafter referred to as “the Company”) invest in massively developing their employees’ cross cultural competency and teaching their global leaders to be at all times inclusive?

The Company develops software products and performs professional engineering related services. It is headquartered in London (UK) and has over 5500 employees (60% are highly skilled, hard-to-find engineers) in ten main locations: USA, Canada, Great Britain, France, Germany, Israel, India, China, Hong Kong and Korea.

Over the past eight years, the Company has transitioned from being a multinational company (with worldwide operations with operationally independent work units) to becoming a truly geo-global company. The senior management team is spread around the globe and each project is delivered out of three, but up to six locations (i.e. countries), by global project teams. Four regions (Great Britain, France, Israel, India) serve customers worldwide, while the North American and Asian locations are mainly focused on local customers.

The Corporate culture has a strong engineering flavor, although is not marked enough to prevail over local cultures in the workplace. As a consequence, for a long time managers had developed local leadership styles that were inadequate in a global organization.

A business failure as a starting point

The Company’s cultural diversity journey started with an incident, which seriously endangered the company’s relationship with a major customer, a US corporation. During a crisis meeting, an Israeli company representative demonstrated a high level of expressiveness and assertiveness that is appropriate in the Israeli culture. He often interrupted the client, expressed himself in passionate (some say intemperate) ways and often finger-pointed his discussion partners to emphasize his points. What is perfectly acceptable behavior in the Israeli culture was considered rude and insulting by the American customer. The meeting supposed to solve a crisis, created an even more alarming crisis.

It was a painful yet effective way to see that from a cultural standpoint, they were unaware of these gross cultural faux pas. They didn’t know what they didn’t know. This was the first essential step towards seeking cultural competence. The Company’s CEO instructed the Human Resources team to have a cultural awareness program designed, developed and implemented.

The first step: a low-key beginning

An in-house cultural anthropologist designed and developed a one-day (8-hour) cross cultural foundation workshop. Then she traveled to the Company’s various locations worldwide to deliver it.

In the design stage she identified a tool (COI©), which became part of the pre-work for the course. The assessment tool was debrief and utilized substantially in the training. As the anthropologist researched and tested several psychometric tools used for cultural awareness training, she used the following criteria for ultimate selection:

* The tool must be grounded in well-established theory;
* It had to be based on sound (both qualitatively and quantitatively) research,
* Be statistically valid and reliable;
* And, last but not least, it should be reasonably priced, in order to train as many employees as possible without creating undue budget issues.

The Cultural NavigatorTM, a technology tool developed and marketed by TMCorp (now TMC/Berlitz) was selected. It is based on the work of leading cultural anthropologists such as Geert Hofstede and Edward T. Hall and is well-grounded in peer-reviewed research.

The one-day cross culture foundation course was designed as part of a cross-cultural toolkit. The objective of the workshop was to develop an employees’ overall cultural awareness and not be limited to a specific culture. The training content was the following:

* Building the business case for culture
* The concept of culture
* The Cultural Orientation Model TM
* The Cultural Orientation Indicator®
* Skill practice and application

As mentioned before, the course’s pre-work required all attendees to answer an online questionnaire which gave them their personalized Cultural Orientation Indicator® (COI®).

*In the beginning…*

In this first phase, despite the CEO’s sponsorship, the workshop was considered “nice to have” by the senior management. Their most frequent remark was “you don’t teach culture, you experience it!” Employees attended the training on a voluntary, rather than on a required basis. Not surprisingly, the employees’ eagerness to participate heavily depended upon each region’s senior management’s level of interest. At this stage, the initiative showed mixed results: the Company had a very robust training product (the class is still taught nine years after its creation), but the management buy-in was clearly inadequate for the training to have a real impact on the organization.

The Company growth shifted the focus

Firstly, external growth: a new subsidiary was acquired in France. Second, organic growth: the Indian operations started growing strongly and having a significant role in the organization. It had two consequences that heavily impacted the general interest for cultural knowledge:

* The new comers (French and Indians) felt lost working in an organization that is not easy to understand, with cultures they were not always familiar with. They were eager to learn about these cultures as a means of integration.
* Slowly, the old timers (mainly Great Britain and Israel) witnessed a change in the power structure, which progressively included the new regions. The two-players game became a four-players game, and then even more. Even though at this stage, each regional operation was quite independent from each other, it was no longer possible to ignore cultural differences. The interdependencies of the cultural teams were evident.

As a first impact, the French senior management stated that the cross cultural foundation course would be mandatory for all French managers and highly recommended it for all their staff, which intensified the Company’s cross cultural training activities.

The second impact wasn’t as positive at first: the emergence of new regions started a healthy technological competition between all regions, which generated multiple unhealthy cultural misunderstanding.

Here are a few examples:

* *“The English are hypocrites!”*

The British indirect communication style proscribes any kind of direct negative feedback. The feedback, given “between the lines” with a toned-down vocabulary (or the famous “British understatement”), wasn’t audible for their Israeli and French colleagues, who use a more direct approach. Either the British teams believed their counterparts were not reactive at all; either the Israeli and French teams happened to learn incidentally about the issue and believed their British colleagues were not frank enough to state it straight. In both cases, the trust between the different countries was wounded.

* *“The French are lazy!”*

The first common work experience showed that the regions had very different work methods. The French team spent weeks assessing (on paper) the different solutions, writing precise requirements, planning the work. Shortly before the due date, they started performing the work and met the deadline. During the same period, their British counterpart tackled the work in an iterative manner: after a short preparation, they did a first version; assessed what didn’t work and redid a second version, then a third one, etc., and also met the deadline. For most British and Israeli observers, thinking and writing time wasn’t really working. They had actually spent weeks observing the French engineers, seen no software engineering work produced, witnessed the French team enjoying long lunches in their nice cafeteria and got the perception that the French were indolent or lazy.

* *“The Israelis are rude!”*

The Israeli communication style is direct and expressive. In meetings, it is appropriate to be assertive and vocal. There is a high tolerance for the display of emotions and it is common practice to interrupt the speaker. We can add to that the fact Hebrew is a very direct language (simple syntax): native speakers tend to keep this “straight to the point” style even when speaking other languages. The other regions felt this communication style as aggressive, sometimes hostile. Until both side learnt to adapt to each other, a lot of Israeli employees were considered rude. The Israeli, for their part, tended to think their counterpart didn’t have much to contribute during the meetings, as they didn’t raise their voice.

* *“The Indians are unreliable!”*

Firstly, a lot of Indians are linear thinkers: while collecting information, they go from details to the big pictures. French and Israeli cultures are systemic: they start with the big picture and then drill down into details. When presenting information, once logically use their own preference, which is the wrong key to understanding for their counterparts. Another characteristic is that until trust has been well established, Indians won’t ask direct questions when they don’t understand. Let’s add a third level of complexity: it is impolite in the Indian culture to say “no” or displease a counterpart. So Indians have developed paraphrases that should be understood as a refusal, for example: *“I will see what I can do”, “I will do my best”*, *“and I will do it later”*. The combination of these three cultural traits created many misunderstandings and a very high level of frustration.

These painful experiences juxtaposed as learning gaps were what the organization needed to realize was actually a cry for cultural training and inclusive leadership. In other words, there is no such thing as common sense when it comes to accurate cross cultural work as what is correct in one culture may very well be offensive in another. Cultural competence needs to be nurtured and grown.

It was decided to increase the number of trainers. Several trainers were certified in all countries, with the aim to empower the regions. They were selected on a voluntary basis in the Human Resources and Training and Development departments. A few select engineers with demonstrated competent interpersonal skills were also tapped. Within a few months, each region was able to schedule as many cross cultural foundation courses as requested.

*After the Foundation Course*

New modules were created to respond to the staff demand for trainings on specific cultures. It was named “The Working with… Series” and consisted of one and a half to two hours’ modules: i.e., “Working with the Americans”, “Working with the British”, “… the French”, “…the Israeli”, “…the Indians”, with three objectives:

* Acquire an understanding of a specific culture values and basic assumptions, and their effect on overall expectations, behavior, approaches to management and teamwork, and communication style in business and organizational contexts,
* Be able to influence more effectively their counterparts, in situations of both one-to-one communication and formal group presentations,
* Determine specific goals and actions for handling specific situations of difficulty, in working with that specific culture.

These workshops included:

* General information on the country, and its social etiquette
* The country Cultural Orientation Indicator® (using TMC/Berlitz database),
* The Company Regional team Cultural Orientation Indicator® (over time, the number of employees who had filled the questionnaire became statistically significant)
* A comparison of the Company Regional team’s Cultural Orientation Indicator®, with the audience’s.

For example, when delivering a “Working with the French” lecture to an Israeli audience, the trainer would display the French COI®, the Company French COI®, and highlight the commonalities and impacting differences with the Israeli COI® and the Company Israeli COI®.

Both the country COI® and company’s country COI® were used to emphasize the differences between the two and the fact the Company engineering culture created a lot of commonalities between the different Company regional cultures.

Initially, it was decided that only employees who had attended the one-day foundation course could attend these workshops, as it heavily relied on the concepts taught in that class. The “Working with…”, delivered at lunch time, fast became very popular among employees and the training teams got the pressure from enthusiastic staff to accept participants who had not attended the foundation course. It was then decide to accept them and use this opportunity to advertise the full cross culture curriculum.

From then on, the Company cross-cultural training became extremely visible. The high attendance in the classes had two interesting consequences:

* The staff, who saw the direct benefice of these courses in their day-to-day work life started to evangelize their colleagues and managers: the wheezy top down start gave way to a bottom up boost.
* Cultural competence progressively got encoded in the Company’s DNA. Managers and staff would systematically request the relevant training when starting a project with a Region they were not familiar with. Also, employees developed a capacity to talk openly and about cultural issues, to solve work problems or work more effectively, or out of curiosity/interest.

*From cultural awareness to cultural competency*

This last phase coincided with the globalization of the organization. Till then, the different regions were specialized by product. It was decided in 2008 to deliver projects out of several locations, in order to optimize the use of resources and leverage expertise. Most projects would involve at least three global regions and the number of managers managing people in several regions suddenly increased. From a handful of senior managers, project managers, research and development (R&D) and delivery managers, support function managers became global managers. Thanks to their cultural awareness, it was obvious to them they needed more specific cultural knowledge.

New training requests came from the field (from the management team this time).

The requested content was aimed at the development of global leaders and was to foster effective global collaboration. The training developed in this phase wasn’t purely cultural. The cross-cultural piece was embedded in other professional and soft skills training programs.

Several modules were added to the Company cross culture curriculum:

* Collaboration across cultures
* Managing across cultures
* Giving and receiving feedback across cultures
* Presenting across cultures
* Project Management Across Cultures

With regards to the managers, the intended objective was to develop managers who can adapt their management style to each local audience, in order to be as effective as possible on-site and, at the same time, lead and coordinate global efforts (this last was achieved with a great level of consistency in all operational processes).

The Company’s long cultural journey has anchored cultural diversity. There are several lessons learnt:

1. In today’s labor shortage, Diversity challenges raise in other forms. The question isn’t only around minorities or women. New inequities based on cultural diversity arise: the fluency of spoken English, ways of conceptualizing for example. Overcoming them, making cultural diversity a strength gives companies a key competitive advantage to attract and retain talents.
2. Learning for the sake of learning doesn’t have its place in a corporation. The designed trainings must answer identified needs. Soft skills trainings must prevent issues, and unfortunately they often first solve issues, and only after prevent them. The training content should always remain very close to the audience’s concerns.
3. Effective global leaders are individuals with the capacity to constantly think and act global and local.

**Case Two – A Community-based NonProfit Organization Embodies Inclusion for People with Criminal Records**

Background

Since 1972, Safer Foundation (Safer) has been at the forefront of workforce programming for people involved in the criminal justice system. Employment and employment-related services are the cornerstones of Safer’s delivery system including job preparedness, placement, and retention services. Safer Foundation is one of the United States’ largest nonprofit providers of services designed exclusively for people with criminal records. In carrying out its work, Safer must work across boundaries of difference both internally and externally that span most aspects of diversity practice.

Incarceration is now an integral part of urban life in the United States, in “*Doing Time on the Outside*,” Donald Braman describes incarceration as the bluntest of policy instruments and concludes that as a response to social disorder it has missed the mark. The result he states is “the relationships and norms described as social capital have increasingly become burdens rather than benefits to many inner-city families” (Braman, 2004, p. 7). According to a study by the Pew Charitable Trust, there are 2.3 million Americans behind bars which represent a 300 percent increase in the United States incarcerated population since 1980, giving the United States the highest rate of incarceration in the world. The United States houses more inmates than the top 35 European countries combined (Trust, 2010). The Pew study defines economic mobility as the ability of individuals and families to move up the income ladder over their lifetime and finds that “incarceration carries significant and enduring economic repercussions for the remainder of the person’s working years” (Trust, 2010, p. 3). Michelle Alexander’s *“The New Jim Crow: Mass Incarceration in the Age of Colorblindness”* (Alexander, 2010) argues convincingly that once an individual is labeled a felon they become subject to a myriad of forms of discrimination – housing, employment, public service benefits – that along with the debts incurred in conjunction with their criminal justice system experience, have created a racial caste system in the United States. Alexander uses the term mass incarceration to encompass the criminal justice system along with the larger web of laws, rules, policies, customs that control both in and out of prison “to insure the subordinate status of a group defined largely by race” (Alexander, 2010, p. 13).

Safer Foundation’s Mission and Services

Safer’s mission is to reduce recidivism by supporting, through a full spectrum of services, the efforts of people with criminal records to become employed, law-abiding members of the community. In addition to employment related services, Safer advocates for people with criminal records, shapes new public policy and seeks to replicate its successes in reducing recidivism.

If people with criminal records are to successfully reenter mainstream society they must be able to earn a living wage. Safer pursues a strategy of increasing job opportunities and career growth for their clients through a program that aligns their education, skills and training assets with the regional economic forecast and workforce demands. In addition to employment services, Safer programs and services include: administration of two Adult Transition Centers for the Illinois Department of Corrections; Focus Apartments a ten-unit apartment building providing transitional housing; Safer Return a targeted community-based reentry initiative and PACE Institute which provides adult literacy programs within facilities of the Cook County Department of Corrections. During fiscal year 2011, Safer served over 13,000 clients and placed over 4,000 men and women in jobs. Safer Foundation’s ability to carry out its mission hinges on translating proven methodologies and lessons-learned from fields as diverse as criminal justice, sociology, community and economic development, mental health, workforce development, social justice and others to build and implement models of practice. The organization partners with government and academic institutions as well as community service providers.

Safer Foundation Retention Services Model

*Orientation and Intake/Assessment:* The intake and assessment process begins with a group orientation. Orientations are held daily basis and are designed to welcome participants to the Safer Foundation and to provide them with an overview of available services. Initial assessment interviews are used to determine program eligibility and include the collection of personal data, such as correctional status, criminal history, work history, educational attainment, health and mental health issues, substance abuse history, barriers to employment and supportive service needs. The initial assessment is also used to screen and assess whether individuals are ready for employment and/or training.

*Job Preparedness Training:* Safer provides pre-employment training in the form of a 35-hour job preparedness training program designed to instruct participants on the culture and expectations of the workplace. The curriculum was developed specifically for the Safer Foundation and for use with people with criminal records. It includes both soft skills development and job preparedness activities, such as resume building, completing job application forms and mock interviews. Proper workplace attire, personal hygiene and communication skills are practiced in the classroom. Indeed, the job preparedness program is operated like a workplace—participants are expected to arrive on time, dress appropriately and actively participate in all learning activities.

*Job Placement Assistance:* Sector Managers actively seek out employment opportunities for Safer Foundation program participants. Once an opportunity is identified, the Sector Manager carefully defines the employer’s requirement for the position and screens participants to identify candidates best suited for the opportunity. The Sector Manager then prepares the candidate for the specific opportunity, facilitating and coordinating the introduction of the prospective employee to the prospective employer.

*Case Management:* Participants will be assigned to a Retention Specialist who will provide case management services, including assisting clients in selecting vocational training and/or educational opportunities, periodic training site visits to provide on-going coaching and support, and engage the client in ongoing professional and personal development activities

Safer Foundation Advocacy Efforts

Hand-in-hand with their client work, Safer addresses the need for systemic change in tackling the issue of recidivism. In 2001, Safer Foundation formed the Council of Advisors to Reduce Recidivism through Employment (CARRE). CARRE members represent individuals, groups, organizations, agencies, coalitions and institutions who work with public policy advocates, employers and legislators to develop and implement strategies to reduce barriers to employment. In 2012, Safer became a founding partner for the Illinois Association for Criminal Justice (IACJ). IACJ is dedicated to the efficient and effective application of justice resources and proven practices to reduce recidivism and restore individuals to stability and productivity in their communities ([www.illinoiscriminaljustice.org](http://www.illinoiscriminaljustice.org)). The organization seeks to bring education, understanding, and attention to the best practices in reentry and community reintegration to the public along with advocacy and community capacity building.

Safer Foundation Workforce Perspective

Due to the nature of its’ work in creating a more just society for people with criminal records, Safer Foundation has exceeded its scorecard goal of 20 percent of its non ATC employees be a person with a criminal record. These individuals make a significant contribution to the organization’s success and work across functional areas of the organization. Conversations with a small group of employees reveal some important similarities. They came first to Safer as clients and experienced periods of frustration with their job search results and other employers. In other organizations they found themselves burdened with the stigma of their backgrounds. This stigma was often characterized by bias, harassment, increased scrutiny, career limitations and termination of employment. They summarized the following significant points about working for Safer Foundation:

1. They feel working for Safer alleviates any concerns they have about their criminal background;
2. They feel they are able to compete on a level playing field with their colleagues and have realized opportunities for upward mobility;
3. They feel working for Safer provides opportunity for longevity and growth.

Safer Foundation Success Stories

*Story One – Former Resident of Crossroad Adult Transition Center:* Resident Hall entered Crossroads in January 2009 and went to work at Five Guys Burger and Fries as a bus boy in March 2009.  He was also started attending Harold Washington College (HWC) part-time in August of 2009 to pursue a career in Rehabilitation Psychology. In September of 2010, one month before his release from Crossroads he was promoted to a manager at Five Guys.  In October of 2010 he was released from Crossroads with $5,000.00 dollars savings. On November 1st he moved into his own place in Chicago and within 30 days he was able to take custody of his three kids.  In January of 2011, he was promoted again to Assistant Manager/ Trainer, he travelled from store to store reinforcing the companies brand standards and in July of 2011 he was promoted to General Manager.  He is currently working as General Manager and training to be a District Manager.

*Story Two – Participant in the Deconstruction Work Service Training Program (a green jobs training program):* Berry spent his youth involved with gangs and had a substance abuse problem which eventually led to his getting a criminal record and incarceration. Through the employment services at Safer Foundation, he became a participant in the Deconstruction Technology Partners vocational training program. He has not only dedicated himself to being successful in the Deconstruction program but became a crew chief and leader to other participants in the program. Berry looks upon his past and his days as a youth and never would have thought that he would one day become a crew chief in a Deconstruction Program.

Safer Foundation Conclusions

Dewey describes the American Creed and ethos in this way “the American thinks, talks, and acts under the influence of high national and Christian precepts….liberty, equality, justice and fair opportunity for everybody….devoted to the ideals of human brotherhood and the Golden Rule…” (Dewey 1939, p. xlvii) To be sure, the political creed of America is not very satisfactorily effectual in actual social life. But as principles which ought to rule, the Creed has been made conscious to everyone in American society (Dewey 1939, p 3).Writing for the *Uniting America: Toward Common Purposes* series, Angela Glover Blackwell, Stewart Kwoh and Manuel Pastor frame the five dimensions of race they feel must be explored if we are to address the prevailing inequities(Blackwell, 2002). These five themes can offer a perspective on Safer’s work:

1. The Black-White Paradigm Versus Multiculturalism – This dimension reflects an understanding that looking at issues of race from a purely black-white perspective is insufficient to understand the nuances and dynamics of other minority groups with whites and other minorities. Yet, it is necessary to know that the way we treat and understand race in America is largely based upon a black-white dynamic.

The frontline nature of Safer’s work illuminates the ease with which blackness and criminal history can be conflated and cast into a black-white dynamic. However, Safer works with individuals from all backgrounds and circumstance that have been brought under supervision of the criminal justice system. As such, staff members must stay attuned to a broader view of how these systems operate and their impact upon the populations under the long reach of these systems.

1. Diversity Versus Racial And Social Justice – It would be a mistake to equate the successes of individuals within the various ethnic groups with racial equality. Having diverse representation in the upper echelons of politics, business and income classes is important but we cannot lose sight of those who have been left behind.

The ever present challenges confronting Safer clients diminishes any illusion that one might have that diverse representation in the upper levels of business, politics, entertainment and income class demonstrate equality and social justice. This is particularly evident in the disparities in educational attainment, job opportunities, housing, and health status.

1. Universal Versus Particular Strategies – These two approaches to advancing the cause of racial equality are steeped in tension. On one hand, many would see specifically-focused efforts (i.e. bilingual education) as critical to meeting the needs of disadvantaged groups. Conversely, those who support universal strategies seek to unite around a common goal (i.e. improved education for all). Either approach requires an honest appraisal of the role of race in our society.

In the fight for economic and social justice, Safer pursues a particular strategy defined to address the unique characteristics and challenges facing people with criminal records. While broader strategies such as educational interventions and workforce development training can be employed they are insufficient without being tailored and integrated with other services to meet the structural and individual challenges which confront people with criminal records.

1. National Versus Local Responsibility – This debate turns on the role of the national government in reducing racial inequality versus local authority and responsibility for such work. However, the fact remains that national policy and direction establish the context for local success.

Indeed, federal funding has enabled Safer Foundation to develop unique and resourceful programs and emerge as a leader in the field. For example, the Department of Labor may fund programs for ex-offender reentry, workforce development for the hard-to-employ and other similar efforts but they require extensive local partnerships, community coalitions and intentional leadership. Leadership scholar Joseph Rost stressed intentionality for change and collaboration between leaders and followers. He defined leadership as “an influence relationship among leaders and followers who intend real changes that reflect their mutual purposes” (Rost, 1991).

1. Structural Factors Versus Individual Initiative – The ethos of the American ideal is liberty, equality, justice and fair opportunity for all. We want to believe in the American Ideal that anyone can rise above their circumstances based upon merit and hard work. Herein lies the challenge – to accept that just as failure can be due to personal short-comings, it is true that success is based upon mediating factors and supports such as educational resources, financial access, training, key personal networks and access to opportunities.

On the individual level, Safer integrates Motivational Interviewing (MI) approaches into all of its employment services interactions with clients from orientation to their on-the-job follow-up contacts. MI is a way of being with people in a collaborative way to elicit their intrinsic motivation to bring about changes in their lives. The responsibility for that change is placed with the client while encouraging self-efficacy (Miller, 2002). In addressing structural factors for equality and criminal justice reform, Safer Foundation works on informing the debate at local, state, national and international forums and advocating for change via coalition building and grassroots action.

The Safer Foundation approach to its work reflects adaptive leadership. Adaptive leadership influences a community to confront its own problems and embrace the idea that solving large societal problems requires adaptive work – a change in values, attitudes, and/or behaviors – to confront complexities where problem definition and solution are not clearly defined. These very problems are at the core of our social and economic disparities and seem unresponsive to our programs and initiatives (Heifetz, 1994). As we consider equality, diversity and inclusion, it behooves us to keep these words by Manning Marable in mind, “The great challenge of any democracy is to ensure that all of its citizens are stakeholders in a common project called civil society” (Marable, 2002, p. xiv).

**Discussion and Conclusions**

It seems apparent that the field of “diversity management” has arrived at a point where its continued value depends on it being recognized as an integral part of organizational practice. Whether in its formative or mature stages of business integration, diversity and inclusion should be an ongoing exercise in capacity building. This can only come about when it is embodied by leaders of the organizations, embraced in organizational visions and codified in business policies and practices. The call for a paradigm shift in how companies, institutions and organizations view human capital is essential for our global marketplace and society in general. Plummer & Jordan see the work of diversity at a critical stage in its life cycle – a stage where static models and step-by-step approaches fall short of effecting cultural change in organizations. They propose that diversity is not a business condition to be managed but dynamic process for integrating different perspectives and worldviews into the fabric of strategies, structures and systems necessary for sustainable competitive advantage. They identify “four business conditions into which diversity must be integrated for sustainable competitive advantage – talent acquisition and talent management; contemporary work design; leadership performance; and globalization” (Plummer & Jordan 2007, p. 35). Undoubtedly these elements rest with the leadership and management of organizations. But as our discussion of transformational leadership points out, successful leadership is relational – a two way street dependent on leaders and followers acting in concert to effect goal achievement. Relationships are subject to individual skills, competencies, motivations and emotions.

Stepping back to take a broader look at equality, diversity and inclusion, we consider the relationships between the workplace and community-at-large. Estlund (2003) examines the potential of the workplace to strengthen social capital, civic capacity and democratic life. She states, “In a society, that is still largely segregated, the workplace is where working adults are most likely to associate regularly with someone of another race” (Estlund 2003, p. 3). She finds that as organizations have had to adapt to a more competitive landscape and become more fluid in executing their missions, they have expanded their capability for communication and collaboration. She asserts that this builds civic skills – communication, collaboration, compromise and collective decision-making. As such, “the workplace is an incubator of social capital and vehicles for deliberation” (p. 123).To the extent that we can build bridges across communities through our workplace interactions, perhaps we can create avenues for equality, diversity and inclusion in other aspects of society and democratic life.

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