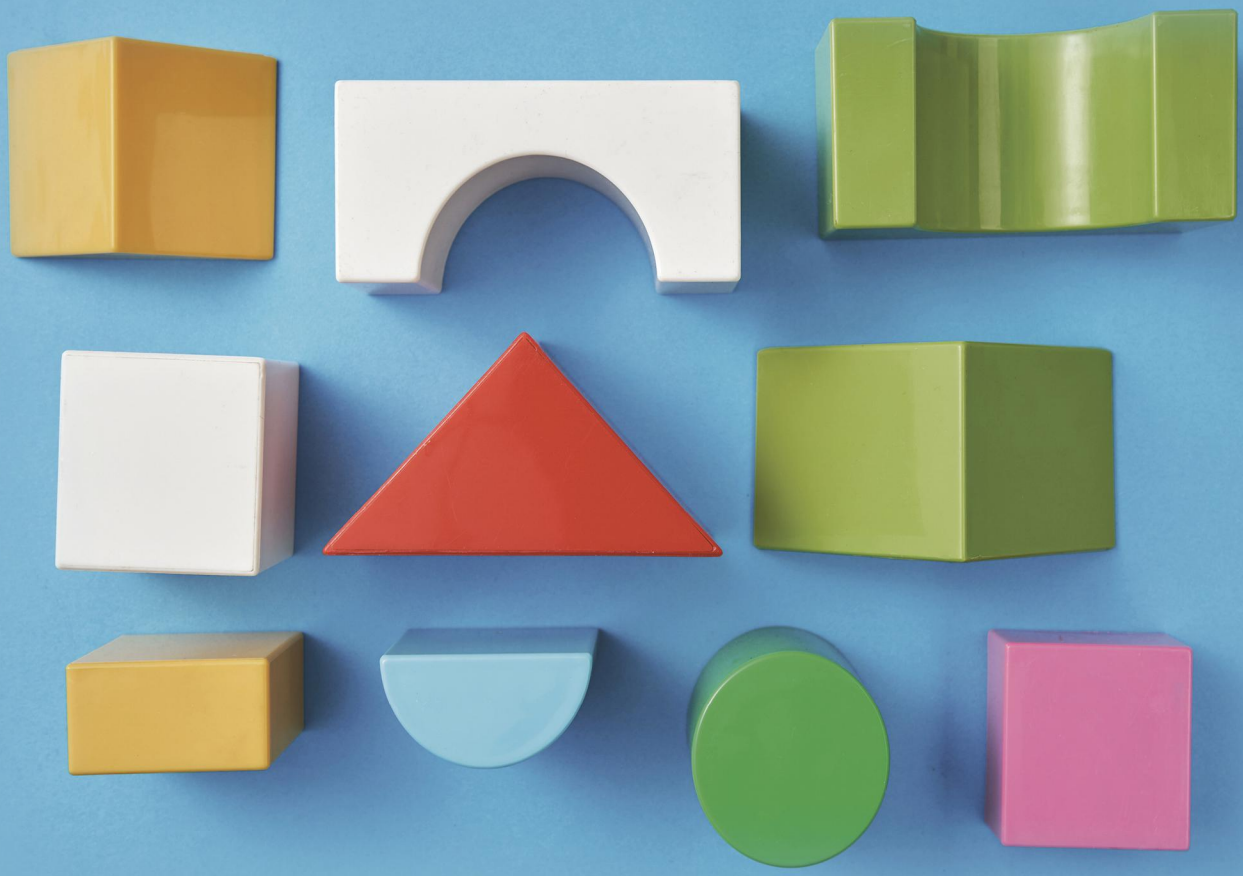
ROSEMARY HAYS-THOMAS

MANAGING WORKPLACE DIVERSITY, EQUITY, AND INCLUSION

A Psychological Perspective

Second Edition



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ROUTLEDGE

Managing Workplace Diversity, Equity, and Inclusion

Managing Workplace Diversity, Equity, and Inclusion bridges the gap between social science theory and research and the practical concerns of those working in diversity, equity, and inclusion by presenting an applied psychological perspective.

Using foundational ideas in the field of diversity, equity, and inclusion as well as concepts in the social sciences, this book provides a set of cognitive tools for dealing with situations related to workplace diversity and applies both classic theories and new ideas to topics such as United States employment law, teamwork, gender, race and ethnicity, sexual orientation, and other areas. Each chapter includes engaging scenarios and real-world applications to stimulate learning and help students conceptualize and contextualize diversity in the workplace.

Intended for upper-level undergraduates as well as graduate students, this textbook brings together foundational theories with research-based and practical, real-world applications to build a strong understanding of managing diversity, equity, and inclusion in the workplace.

Rosemary Hays-Thomas is Professor Emerita at the University of West Florida in Pensacola, where she developed the university's first course in Workforce Diversity and was Psychology Department chair. She has published widely, consulted, and held elected office and fellow status in several psychology organizations. She also holds a lifetime certification as a Senior Professional in Human Resources and, for many years, was a licensed psychologist.

"Professor Hays-Thomas deftly blends the conceptual background that practitioners need with the practical applications to which academics often have limited exposure. Without a doubt, this is the go-to textbook for the next generation of diversity, equity, inclusion and accessibility professionals."

Marc Bendick, Jr., Bendick and Egan Economic Consultants, Inc.

Second Edition

Managing Workplace Diversity, Equity, and Inclusion

A Psychological Perspective

Rosemary Hays-Thomas

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In Memory of Cliff
For Nia and Brigid
And for Robin
Toward a diverse future of equity and inclusion

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Preface

This book concerns the scholarship and practice of diversity management at work. In the United States, this field grew out of 20th-century concerns about increasing demographic diversity in the workforce and changes in the law concerning fairness and discrimination. Practice developed within human resources, management, law, and other areas, often without influence from relevant scholarship in psychology and other social sciences. This book aims to bridge that gap by focusing first on relevant social science, then applying it to areas of concern and practice in Diversity, Equity, and Inclusion (DEI). The book is targeted at graduate students, advanced undergraduates, and professionals interested in improving DEI in work organizations.

In their history of diversity management, Pringle and Strachan (2015) identified five "Duelling Dualisms:" dichotomies in emphasis that have characterized this field. These are (a) social justice and moral case vs. economic and business case; (b) practitioner vs. scholarly focus; (c) emphasis on gender vs. other dimensions of diversity; (d) quantitative vs. qualitative focus; and (e) US issues vs. country context emphasis. This text attempts to address both sides of the first four dualisms but emphasizes issues and applications in the United States because of its particular legal provisions and cultural context.

Chapters move from foundational information (Part I) through relevant concepts in social science (Part II) to issues and applications in targeted areas (Part III). Two chapters in Part IV address possible solutions targeted at individuals and at the organization as a whole. Older classic theories and research are included to show their continued relevance; recent topics, controversies, and empirical results are presented to guide practice and research. Despite the attempt at comprehensive treatment, due to space limitations, many relevant sources could not be included. For those who wish to read more, literature reviews are cited and reference list citations with asterisks are provided.

Much has changed since the publication of the first edition in 2017. Practice and scholarship have moved from stressing Diversity to D&I and then to DEI, hence the change in title for this second edition. Employers and scholarly/professional organizations are increasingly concerned with diversity issues. In human resources and social science, attention to gender and racio-ethnic identity and behavior has increased and the #MeToo movement has drawn attention to harassment. Implicit bias has become an everyday term. The effect of existing law on maintaining societal division has been more widely recognized. The *Bostock* decision by the US Supreme Court has dramatically changed the employment context for the expression of diversity in gender and sexual orientation. The US political climate has become more divisive with many advocating for homogeneity and exclusion rather than the diversity, equity, and inclusion of this research and practice area. In part, this reflects a response to

increasing demographic variation within the country and concerns many feel about living in a changing social environment. Widespread use of cell phones, the Internet, and social media have raised awareness of social injustice and political division. Conduct and tabulation of the 2020 Census have been greatly delayed and challenged the accurate documentation of the US population. The COVID pandemic of 2019 continues to produce dramatic and sometimes unpredictable changes in work settings and the people who were, are, or wish to be there. All are reflected in topics and sources for this second edition.

Thanks are due to many who have helped in the preparation of this edition by sharing research and ideas or reviewing content. They include chapter coauthors Donna Chrobot-Mason and Susan Walch, as well as Marc Bendick, Leslie Hammer, Deborah Rupp, Eduardo Salas, Katina Sawyer, Sherry Schneider, Elizabeth Shoenfelt, Donald Truxillo, and Stephen Vodanovich. Bruce Swain read every word and provided valuable manuscript feedback. Maria Brown capably proofed and advised on language and expression. Archie Brown, Ellen Harrell, William Penick, Matt Sakakeeny, and Robert Sakakeeny shared ideas about new material, and Melissa Brunvoll assisted with the preparation of figures. My editor at Taylor and Francis, Christina Chronister, provided good advice and much encouragement. The Pace Library at the University of West Florida provided important access to literature. And over the years, my students and colleagues have taught me much about DEI.

Like the first edition, this update has benefited from a SAGES small grant from the Society for the Psychological Study of Social Issues (SPSSI). For many years, SPSSI has supported action research and scientist-practitioner approaches, as well as some of the scholarship discussed in this book.

Finally, I thank Ailie Dickey Kraemer and the Dickey family, who provided a beautiful and quiet environment in which to begin writing, and my friends and family, who tolerated my conversation about "the book" and supported my efforts.

I am profoundly grateful to all of them.

Rosemary Hays-Thomas
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Pringle, J.K., & Strachan, G. (2015). Duelling dualisms: A history of diversity management. In R. Bendl, I. Bleijenbergh, E. Henttonen, & A.J. Mills (Eds.), *The Oxford handbook of diversity in organizations* (pp. 39–61). Oxford. https://doi.org/10.1093/oxfordhb/9780199679805.013.27

Part One

Basic Concepts, Tools, and Information

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Chapter 1

Diversity, Equity, and Inclusion in Organizations

Basic Concepts

DIVERSITY, equity, and inclusion (DEI) are central concepts in contemporary workplaces and the topic of a growing body of research in work-related fields (e.g., Roberson et al., 2017). Miscommunication often results from the fact that people use the same words but may not mean the same thing. Therefore, we begin by defining terms that we will use throughout this text. What is diversity, what are equity and inclusion, and how do they differ from some other familiar terms?

DIVERSITY, EQUITY, AND INCLUSION—WHAT DO THEY MEAN?

The importance of shared meanings is illustrated in the two studies of college students' understanding of "diversity" (Chen & Hamilton, 2015). The first study showed that for minorities, perceptions of "diversity" were affected *both* by their numerical representation *and* their social acceptance. However, a second study showed that for White participants, perceived diversity rose when description of *either* minorities' numerical representation *or* their social acceptance was higher. For participants who were students of color, in contrast, perceived diversity increased only when *both* representation and acceptance were high. In this research, diversity meant different things to the two groups.

When the word and the field of *diversity* first became popular in the 1980s, the term referred to changes in demographic characteristics of the labor force and work organizations, particularly race, ethnicity, and sex. The workforce was expected to be more variable in the future in these demographic characteristics, and diversity seemed a good word to convey these differences. Later, some thought it would be useful also to consider other bases for diversity such as education level, geographic background, language, value system, and other attributes. We can think of the first meaning as a *narrow* definition and the expanded meaning as *broad.*

Subsequently, diversity managers and scholars also began considering *inclusion.* Early diversity work emphasized the process of *bringing into the work organization* those who were different from current employees in important ways. This is called *representational diversity.* However, practitioners and researchers began to see a pattern: Women and ethnic minorities were hired but seldom progressed in the organization, and some even left in a fairly short

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time. Merely hiring people from underrepresented groups clearly is not sufficient to maintain diversity. Employers must also consider processes and factors that lead people of difference to become fully accepted and equally productive and rewarded at work. This state is called *inclusion*, without which newcomers, especially if from underrepresented groups, may feel like the *outsider within* (Collins, 1986); they may experience special stresses, resign prematurely, remain stagnated at entry levels in the organization, or even be terminated.

Some definitions of inclusion focus on how the employee feels, and others refer to characteristics of the work organization, such as its processes and climate. Some definitions do both. For example, Ferdman says that inclusion involves "how well organizations and their members fully connect with, engage, and utilize people across all types of differences," but that its core is "how people experience it" (2014, p. 4). Shore et al. have reviewed the literature on inclusion and offer a definition incorporating both aspects: Inclusion is "the degree to which an employee perceives that he or she is an esteemed member of the work group through experiencing treatment that satisfies his or her needs for belongingness and uniqueness" (Shore et al., 2011, p. 1265). This definition also highlights both a wish to be accepted as part of a group and a need for uniqueness. A review article by Shore et al. (2018) summarizes literature on inclusion pertinent to work groups, organizations, leader behavior, practices, and climate, and offers a model of inclusion.

Recently, some organizations have begun using the term "equity" along with diversity and inclusion, as in "DEI program." Definitions found on websites of foundations, nonprofits, consulting groups, and universities define *equity* simply as denoting "fairness," but without defining that term. Some mention reduction of bias and discrimination and/or identifying and reducing traditional systemic barriers to information, resources, and opportunity. Another theme is that rather than treat people *equally* (i.e., the same), organizations should provide them with individualized resources needed to accomplish equal outcomes (e.g., Molefi et al., 2021).

How does this differ from traditional nondiscrimination, affirmative action (AA), and equal employment opportunity (EEO)? How does this perspective fit into the typical organizational environment where cost-effectiveness is valued? Is this term a response to the current sociopolitical acknowledgment of systematic bias? Will this theme become characterized by clear definition, strategically developed procedures, and widespread acceptance?

Why a Narrow Definition of Diversity?

There are several good reasons. First, the narrow usage refers to differences among people, such as sex, race, age, or disability, that have historically been the basis for important power differences and serious discrimination and hostility. Some of these differences are called *protected categories* because membership in these groups entitles one to legal protection against illegal discrimination. Some think these are the most common and most important bases for mal-treatment, and expanding the definition will dilute our focus on these historically significant and very serious differences.

In addition, the narrow usage generally refers to *surface diversity*, meaning attributes of people that can easily be seen and thus often become the basis for stereotyping and misunderstanding. These dimensions are often important in social interaction and are familiar to most of us as potential bases for difficulties at work. They are also widely studied by social scientists.

Most of these differences relate to *ascribed status*: social position that is accorded to people because of who they are rather than what they have achieved. Most of these attributes are

not under the person's control and cannot be changed at will through energy, effort, or talent. Some, such as sex and race, typically do not change throughout one's life, although we do get older, and some of us may become disabled.

Some problems occur with this narrow definition, however. If a diversity program seems to deal only with women or ethnic minorities, it may be difficult to garner support from White males (WMs) who may see nothing positive and even potential losses for themselves in the program. Diversity activities may become marginalized and seen only as relevant to women or minorities.

Another problem is that a narrow definition of diversity may lead to confusion of this term with others such as EEO or AA, which have legal definitions and maybe disliked or even reviled by those with negative experiences they attribute to these programs. The term EEO came into use in the Civil Rights era of the 1960s. An employer identifying as an Equal Opportunity Employer is stating publicly that all qualified applicants will have an equal chance for employment without fear of discrimination based on race, sex, religion, color, or ethnicity, the factors covered in Title VII of the Civil Rights Act of 1964. EEO ensures equal consideration, not preferential hiring.

AA means that an employer will conduct various kinds of outreach to find and attract qualified job applicants from underrepresented groups. AA is a requirement for the federal government and for any organization that contracts to do a significant amount of business with the federal government. Like EEO, AA does not require an employer to hire anyone, certainly not anyone unqualified for the job.

EEO is a *passive* statement saying only that an employer will not discriminate unfairly. AA is an *active* statement that the employer will act *affirmatively* or proactively to attract qualified applicants from groups that in the past were victims of unfair exclusion and discriminatory treatment. Although the terms AA and EEO are related to the idea of DEI, they mean something different. EEO and AA are addressed more fully in Chapters 2 and 7.

Why a Broad Definition?

First, many types of differences within organizations can cause problems in communication and interaction to which diversity concepts can be applied. Some examples are an employee's functional area (department or specialization), organizational level, geographic origin or accent, or personality and work style. Recently, advocates for "neurodiversity" have highlighted the benefits of including individuals with attention deficit hyperactivity disorder (ADHD), dyslexia, or conditions on the autism spectrum. Any of these attributes can be the basis for serious stereotyping and prejudice. Thinking of these as diversity issues improves our understanding of workplace dynamics and leads us to a broader range of research literature and techniques for addressing problems. For example, many studies exist on homogeneity vs. heterogeneity in problem-solving groups, based sometimes on sex but often on other types of differences.

A broader definition also encourages people to recognize that diversity initiatives can be beneficial for everyone. Often programs targeted at one group later become helpful to others. For example, mentoring programs or assistance with children's day care or elder care might first be designed for women but later prove very helpful for men as well. The broad definition also reduces the confusion of diversity with EEO or AA, and it encourages us to think about differences whether or not they are addressed by fair employment law.

Finally, a broader definition reminds us that differences are *socially constructed*, meaning that what we consider "different" arises from social interaction and is context-relevant. The

situation determines what differences are noticed and considered important. At work, we may not even notice whether someone has brown eyes, but we usually are aware of a person's brown skin.

The major argument *against* using a broad definition of diversity is that it suggests that all kinds of differences are equally important and worthy of our attention and resources. Surely, more damage has resulted from discrimination against ethnic minority individuals and women than from differences in personality, functional area, or work style. The late Elsie Cross, a widely respected diversity consultant, recounted the humiliation and pain of being unable to use the bathrooms in bus terminals during long trips because of her race. She saw a driver threaten a Black soldier with being shot for sitting in the front of a bus and persevered through many discriminatory educational and employment barriers that did not occur for most White women. Cross said, "When people today tell me that managing diversity is about 'all kinds of difference' I just look at them with amazement. Obviously, all difference is not treated the same" (2000, p. 23). From this perspective, it is a mistake to use scarce diversity resources to address all kinds of difference rather than to correct the consequences of illegal and harmful discrimination.

The capable diversity manager will consider the context of a particular organization and chart a course for DEI that takes into consideration both the broad and the narrow views. Each is appropriate in some situations.

Diversity, Diversity Management, Equity, and Inclusion: Working Definitions

From a psychological perspective on diversity management, our concerns are the behaviors and feelings of different people and how organizations and managers can most effectively deal with these issues. Therefore, we will use the term *diversity* to mean "differences among people that are likely to affect their acceptance, performance, satisfaction, or progress in an organization" (Hays-Thomas, 2004, p. 12). Thus, diversity includes whatever differences are most significant in a particular organizational setting. *Managing diversity* concerns how organizations design processes and structures to make these differences into assets and sources of strength rather than liabilities and sources of weakness. More specifically, *diversity management* refers to planned and systematic programs and procedures designed to (a) include diverse people and improve interaction among them; and (b) make this diversity a source of innovation and increased effectiveness rather than miscommunication, conflict, or obstacles to employees' performance, satisfaction, and advancement. *Equity* concerns examining outcomes (e.g., retention, promotion, financial rewards) for different groups and the procedures and policies that produce them, then correcting unfairness where it is found. *Inclusion* refers to one result of good diversity management practices: the experience of acceptance, satisfaction, and progress by different groups of people. It applies especially to individuals and groups differing in sex, ethnicity, culture, ability status, sexual orientation, or other ways that are significant in a particular organization.

Valuing Diversity

This term refers to activities or procedures intended to highlight in a positive way the uniqueness of various groups or individuals. For example, organizations may call attention to holidays or religious periods that are recognized by people of different faiths, ethnicities, or national origins. *Cinco de Mayo* celebrations are a common example. Although ethnic meals,

dance exhibitions, and informative displays are interesting and positive in tone, they generally do little to address diversity conflicts that may exist in the employment setting. They can surely be part of a diversity management program, but by themselves, they are not enough. Other things organizations can do are discussed in later chapters.

WHY IS DIVERSITY IMPORTANT?

Why should a manager, CEO, or HR staffer be concerned about diversity in the organization's workforce? The short answer is that workforce diversity affects every HR function in the organization as well as outcomes for employees (see Kossek & Lobel, 1996). Diversity relates to nearly every chapter in the typical industrial-organizational (I-O) psychology or management textbook.

Job Analysis and Design

One of the first steps in making decisions about employees is to identify what must be done in each job and how jobs relate to each other. In new or very small organizations, this is often done on an *ad hoc* basis, using "common sense" or judgment based on what the founder or owner has in mind. However, in existing or larger organizations, typically this is done through *job analysis* by observing, interviewing, or surveying job incumbents and people in related jobs. For example, the job analyst might collect information from the supervisor or someone in another job who interacts frequently with the incumbent to accomplish work. A good job analysis produces a list of tasks, including those considered *essential functions*, as well as the list of the knowledges, skills, and abilities (KSAs) to be sought in applicants during the next process of *selection.*

Diversity should be considered in the job analysis process. For example, job analysis and KSAs may be inaccurate or even discriminatory if they are not based on a representative sample of incumbents of different demographic characteristics. Furthermore, some attributes may be required because of how one job relates to others; for example, it would be useful for supervisors to be able to speak some Spanish if they will supervise a number of Spanish-speaking employees. Finally, in some cases, incumbents in a particular job may be homogeneous in terms of race, ethnicity, sex, or other attributes. Separating the tasks and KSAs that characterize these people from the ones that are really needed to do the job well can be difficult. Perhaps other attributes or backgrounds not currently represented would lead to equal or better performance.

Recruitment and Selection

The recruitment and selection function involves attracting and hiring people who have or can learn the necessary KSAs for the job in question. Diversity should be considered in this process for several reasons. First, sometimes an organization actively tries to diversify its pool of employees. Perhaps the company's customer base includes persons who differ from its employee group in primary language, racio-ethnicity, sex, religion, or other attributes, and product development or marketing could be improved by including these perspectives within the organization. Some organizations are following an AA plan or engaging in corrective action after an investigation or a lawsuit alleging discrimination.

Second, the measurement of job-relevant attributes may be affected by test-takers' backgrounds. Some commonly used tests may not accurately or fairly assess job-related skills if the individual possesses a disability or comes from a minority ethnic group with a background different than that of majority employees. For example, it is well documented that cognitive ability tests when used alone may underestimate the ability of minority employees to perform jobs like those of public safety employees (Outtz & Newman, 2010). This occurs because cognitive ability test scores are affected by things (such as test-taking skill) that are not associated with job performance. This problem can lead to the elimination of qualified racial minorities from hiring pools and result in discrimination charges or lawsuits. Alternative ways of measuring KSAs may be needed in the selection process to assess individuals accurately when they are from a different background than previous employees.

Third, organizations may find that their applicant pools are more diverse than in former years, and the selection process may require adaptation to take this into account. For example, in some settings it would be appropriate to provide testing instructions in various languages. In fact, the increasing diversity in the nation's workforce is an important factor that led to the diversity movement.

Training and Socialization ("Onboarding")

When newly hired employees join an organization or when incumbents move to new jobs, typically they must learn about the jobs' specific requirements as well as relevant policies, culture, and norms. *Training* refers to learning experiences specifically designed to focus on the job activities and work policies. Training may be provided for newcomers and for incumbents when a job is changed significantly or new policies are instituted. In contrast, s*ocialization* generally refers to the process of learning the culture, norms, procedures, and patterns of work behaviors and usually applies to informal experiences of those entering a work setting. Socialization may also be addressed through mentoring programs, employee orientation sessions, or written materials, but in some cases, it is simply assumed that new employees will adapt by figuring these things out on their own. How is diversity related to these processes? With respect to training, existing systems or programs may need to be adapted to the educational backgrounds, language capabilities, or learning styles of new employees who are different in important ways from the employees of the past. As another example, organizations may need to develop training experiences for new types of interpersonal interaction that are required by shifting customer bases or different employee attributes. One illustration is the *culture assimilator* (Fiedler et al., 1971), a training program developed to prepare those assigned to work in another country to interact effectively by learning how to behave appropriately and without giving offense.

Concerning organizational socialization, if a new employee comes from a background similar to those already employed—same college education, sex, or racio-ethnic group, for example—the person may already have absorbed informal social knowledge about what is expected, how to dress, speak, and relate to others within the social system of the work organization. However, for the first person of color ever to serve in a particular role, the first woman to lead a particular work group, or someone from a religious or ethnic background that is unusual for the organization, some of those informal understandings may be difficult to anticipate or to master. One way to overcome this difficulty is a mentoring program in which a senior person knowledgeable about nuances of organizational life is partnered with a newcomer so that a broad range of career and psychosocial issues is part of discussions between them over time (Kram & Hall, 1996). Training and mentoring are discussed in Chapter 13.

Performance Appraisal/Evaluation

This term refers to the evaluation of *work performance:* how well people are doing their jobs. Performance reviews should be based on work assigned to employees. In larger organizations, there may be an annual cycle of formal performance evaluation; often it is part of a larger process that includes planning or goal-setting for a particular time period, evaluation of performance with respect to those goals, and decisions about performance-based monetary or other rewards (such as promotions, raises, bonuses, or awards). In a well-functioning organization, this formal system is supplemented by frequent informal feedback on things that are being done well and situations that require correction or, perhaps, discipline. Performance feedback is more helpful when one receives it shortly after the relevant behavior or event; this gives the employee guidance about what to continue or increase and how to improve while there is still time to do so. How is diversity related to this process?

Most importantly, the performance appraisal process should not be biased by the sex, race, ethnicity, age, religion, or other attributes of workers that are not job-related. Many grievances and lawsuits have been filed, and some of them won, because employers evaluated and rewarded the job performance of men and women, or workers from majority groups and people of color, differently and unfairly, sometimes without realizing they were doing so. Furthermore, an employee who feels unfairly evaluated based on sex, ethnicity, or other non-job-related attributes will likely be dissatisfied and resentful and may respond with reduced effort and performance, poor attendance, or perhaps even dysfunctional behaviors such as theft.

Employees from different backgrounds may not recognize the importance of aspects of work performance that are commonly understood among those more typical of the organization's members. For example, the importance of meeting deadlines or arriving at work on time varies among cultural groups with different interpretations of time. Expectations should be clear at the beginning, and supervisors should be careful in making assumptions about what "everybody understands."

It's an organizational truism that people do those things for which they are rewarded. Therefore the performance appraisal and reward structure should be designed to emphasize what is important to the organization. If the work setting truly values diversity, equity, and the importance of inclusion and career development for workers of different backgrounds, then performance expectations and rewards for managers should explicitly reflect this expectation. In some organizations, how managers deal with issues of DEI may be part of their work assignments and performance evaluations.

Job Evaluation and Compensation

The term *job evaluation* refers to a system for assigning worth to *jobs*, as distinguished from evaluation of the work performance of employees discussed previously. In some larger organizations, jobs are arranged in a hierarchy following a system of weighted job factors such as necessary skill and effort, difficulty of working conditions, or responsibility for people or money. The job evaluation process is designed to produce an ordering of jobs that is linked to compensation with the most important, difficult, and highly paid jobs at the top. However, this hierarchy is usually distorted by the fact of *occupational segregation*: in most organizations, there is a pattern of certain jobs, job categories, or departments being filled predominantly by women or by men, or by people of color vs. Whites (Hegewisch & Tesfaselassie, 2019; Weeden et al., 2018). This results in part from explicit discrimination in the past,

demographically linked individual choices in education and careers, socialization patterns and role expectations typical for different groups of people, and other factors. Judgments about skill and other job factors can be biased by knowledge of the kinds of people who typically occupy a job or the typical level of pay for that work (Grams & Schwab, 1985). The term *wage gap* refers to the well-documented difference between the annual earnings of men and women (or of Whites and ethnic minorities) working year-round and full-time. Though there are many reasons for this gap, one factor recognized by most experts is the influence of deliberate or unintentional bias based on demographic attributes of job incumbents. Examples abound: teaching, child or elder care, and secretarial, janitorial, and housekeeping work.

The point is that judgments about the importance of jobs, and related decisions about compensation, are often biased by the demographic attributes of the workers who perform those jobs. This topic is discussed in more detail in Chapter 4.

Group Processes and Leadership

When groups or teams are composed of people who differ from one another in important ways, two types of results may occur. First, differences in experience, demographic characteristics, personality, ability, or other attributes may lead to more effective work and a better product. For example, perhaps the task requires different types of expertise that would not be found in a homogeneous group. A diverse group may produce more creative ideas about how to approach tasks or problems. On the other hand, differences among people may also lead to communication problems or to conflicts related to different goals or expectations. Often the difference between harmony and productivity on the one hand, and conflict and crisis on the other, is how differences in a group are understood and managed. Important differences that are ignored or are simply expected to be irrelevant are likely to be a source of difficulty among coworkers.

Leadership refers to processes of goal-oriented influence in group and organizational settings. Many different styles and leadership behaviors can be successful, depending on factors like the nature of the task and the context, available resources, and expectations of followers. With respect to diversity, often differences exist in access to leadership positions or behavior and success in that role among people who are male or female or vary in age or racio-ethnicity. Effective leadership behavior may vary with characteristics of followers, and the same leader behavior may be received differently when the leader is a member of a majority vs. an underrepresented group. The effects and management of heterogeneity within work groups and the process of leadership are discussed in Chapter 8.

Organization Change and Development

This term refers to processes and techniques that occur when leaders, consultants, or members of organizations attempt to improve internal relationships and accomplishment of important goals. Sometimes organization development (OD) techniques are used to diagnose and remedy problems among people or groups that impede the organization's success. At other times they are used when organizations are doing well but want to do better. How is this related to diversity?

As one example, consider two organizations that are merged. Perhaps one has bought out the other, and the two cultures, employee groups, and work processes must be combined. This is even more difficult because some number of executives, managers, and employees may lose their jobs in the process. One aspect of a successful merger is managing impacts on people when the organizations are combined.

Another example is, in fact, the management of diversity itself. Good diversity management is a form of OD. Some organizations may attempt to become more diverse in response to changes in customer base, applicant pools, or stakeholder expectations. In other cases, an organization becomes more diverse in ethnicity, age, sex, or other member attributes as circumstances change, and continued effectiveness may require different procedures or behaviors so that this increasing diversity is a source of strength for the organization. Chapter 14 addresses the use of OD techniques for improved diversity management.

WHY IS DIVERSITY IMPORTANT NOW?[1]

Attention to demographic differences in the US workforce is not new. Nkomo and Hoobler (2014) describe four eras of practice and research in management of human resources: pre-1960s, the equal opportunity-Civil Rights era, the diversity management/multiculturalism era, and the present era focusing on inclusion and considering many dimensions in addition to race. Our text begins with the EO/Civil Rights era.

After the major 1960s Civil Rights legislation discussed in Chapter 7, work organizations attended more to hiring of various demographic subgroups, particularly women and members of ethnic minorities. Processes such as AA resulted in increased demographic diversity at work. When employers found they could be sued for alleged discrimination, many put into place programs and processes that were required or that would reduce the likelihood of lawsuits.

The corporate world's emphasis on diversity management increased during a period in the 1980s when integration slowed as a result of conservative appointments to the judiciary, unfavorable court decisions, challenging legal procedures, and inadequate remedies. According to Paskoff (1996), "Diversity programs came into being in part as a response to this legal vacuum. Astute business people realized there were problems of discrimination in the workplace, and the law was not then a significant force in addressing them" (p. 47).

Drivers of the diversity movement at this period included real and perceived demographic changes in the workforce, changes in the structure of our economy and in the organization of work, and the development of the *business case* for diversity.

Actual Demographic Changes in the Workforce

The 2000, 2010, and 2020 census counts confirmed that the labor force was becoming more ethnically diverse. Since the 1990 census, the relative numbers of those identified as Hispanic (of any race) and Asian have increased. Non-Hispanic Whites, though still in the majority, have dropped, and Blacks/African Americans have remained relatively constant. In 2000, for the first time, respondents could indicate more than one race. Ten and twenty years later, the 2010 and 2020 tabulations showed increases in this multiracial identity. In addition, age cohorts of the workforce are changing. Median age is rising, and more workers of retirement age continue to be employed at least part-time. These patterns (which may change as consequences of the COVID-19 pandemic) are discussed in more detail in Chapter 2.

(Mis)Perceptions of Demographic Change

One major impetus for the diversity movement was the publication of *Workforce 2000* by the nonprofit Hudson Institute (Johnston & Packer, 1987). This book was widely claimed to show dramatic demographic changes to come. However, its huge impact actually resulted from a misinterpretation of the book's statistical portrayals, erroneously and widely repeated in the media.

Four trends were discussed in the book: (a) the economy would grow; (b) the manufacturing sector would shrink and service industries would increase; (c) many of these new service jobs would require higher levels of skill; and (d) the labor force would slowly become larger and would include more older workers, more females, and relatively fewer Whites. An illustration titled "Most New Entrants to the Labor Force Will be Non-White, Female, or Immigrants" (Johnston & Packer, 1987, p. 95, Figure 3.7) showed percentages of the 1985 labor force in six demographic groups along with a bar graph for the same six groups labeled "Increase, 1985–2000." This was widely misunderstood (DiThomaso & Friedman, 1995). The second bar graph actually showed the percentage of *net* new entrants by 2000 for each demographic group, not the percentage of new entrants. *Net new entrants* refers to those in a particular group who join the labor force, minus those from that group who retire, die, or leave the workforce. The graph was inaccurately understood to show that only 15% of the *2000 workforce* would be "native white males," when actually it meant that 15% of the *net new entrants* would be in that category.

White males (WMs) were the largest group of both current and new workers, and most were already in the labor force. Thus most WMs entering the workforce would simply replace others who were leaving, which was not true for other demographic categories. As a result, although WMs were increasing, their growth would be slower than that of other categories, which were, and remained, smaller although drawing proportionally more new entrants. The confusion overstated the expected increase in diversity and led to the widespread belief that without extensive training, managers would have difficulty with this dramatically changed workforce. The movement quickly gathered steam as consultants rushed to provide workshops, articles, training materials, and trade books on *managing diversity*.

Changes in the Nature of Work

The contemporary focus on DEI has also been influenced by several work trends. These include globalization, the shift from manufacturing to service work, the electronic technology revolution, increased organization of work around teams rather than individual jobs, increased reliance on contingent workers, and factors leading to greater instability in employment for many people.

Increased globalization means that today's work organizations function internationally or worldwide more than those of the past. This remains true despite recent political shocks and increases in nationalism and immigration concerns (Ghemawat & Altman, 2019). In Europe, national boundaries are more permeable due to the European Union and the removal of many barriers to commerce and travel. More people work for US subsidiaries of foreign companies than ever before (Bialik, 2017). Outsourcing or offshoring of jobs from the US to other countries has become commonplace, and even companies housed in the United States do increased business in other countries (Perry, 2016). For example, in 2018, the iconic American auto company, Ford, employed about 199,000 people with operations on every continent except Antarctica (Ford Motor Company, 2019). Competition occurs across national boundaries, and US brands may be owned by foreign companies or vice versa (Nestlé, 2019; Pepsico, 2019). As a result, workers in the United States collaborate with those in other countries; managers receive international assignments and travel across national borders to conduct business. The implication for diversity management is that customers, employees, and executives increasingly encounter others from different countries and cultures. (For an interesting example, see the shaded box.)

BEERS AROUND THE WORLD

Know any Bud drinkers? This classic American beer is made by Anheuser-Busch, which was founded in 1852 in St. Louis (Anheuser-Busch, 2016). In 2008, Anheuser-Busch was bought by the Belgian brewing company InBev and became part of the larger global company Anheuser-Busch InBev (AB InBev, n.d.). This huge brewer lists three *global beers* (Stella Artois, Corona, and Budweiser), five *multi-country brands* (Leffe, Hoegaarden, Castle, Castle Lite, and Beck's), and numerous *local champions* such as Bud Light, Michelob Ultra, Skol, and Modelo Especial.

Already the half-owner of Grupo Modelo, the Mexican company that makes Corona beer, Anheuser-Busch InBev bought the other half in June 2012. Thus, the maker of Budweiser expanded its beer labels and became a company with 150,000 employees in 24 companies around the world and annual sales of $47 billion! With this sale, InBev's brands were introduced into the Mexican market. In October 2016, the company completed its takeover of SABMiller, a South African company, to become a huge global brewer with over 500 brands in more than 100 countries (Arthur, 2018).

To access some of the company's websites, one must be of legal drinking age. Because this varies by country, the viewer must enter his or her country as well as birthdate. This is just one minor complication resulting from the globalization of the brewing of beer!

Another change in recent years is shrinking of the manufacturing sector and growth in the service sector in this country. In 2018, about 13% of workers were found in production of nonagricultural goods, while approximately 80% were in service jobs, and this trend was expected to increase by 2028 (US Bureau of Labor Statistics, USBLS, 2019b). In addition, even in manufacturing firms, there are many service workers, such as those in human resources, housekeeping, or accounting. The growth of service work has major implications for diversity management.

Those who manufacture may seldom see or interact with those who use their products. In contrast, service providers interact directly with the consumer (Gutek, 1995). To deliver good service, one must be able to understand customers' needs and communicate clearly with them. Consider the difficulty of providing good diagnostic and health-care services when patients and providers come from different cultures. Effective teachers must use language that their students understand; professionals, salespersons, and waitstaff must communicate effectively with clients and customers or sales and tips will suffer. Bridging diversity is critical in service work.

Another trend, the phenomenal growth in electronic communications across geographical boundaries and time zones, means that information can be exchanged 24 hours a day across language groups, geographic regions, and cultural divides. Workers collaborate with others they have never met personally, virtual groups make decisions and solve problems, and less opportunity exists for the face-to-face interaction that leads to the development of group norms and interpersonal trust. Teleworking is more common, and managers may supervise people they seldom see. This trend accelerated dramatically during the pandemic that began in 2020 (Pew Research Center, 2020). Anyone who has used electronic mail knows the increased possibility of misunderstanding due to a lack of visual and vocal cues, as well as body language. Texting, twittering, and other electronic postings may be so abbreviated that contextual cues are greatly reduced. In addition, socioeconomic class differences in technological access and competence at home and at work correlate with education and income levels.

In contemporary organizations, work is increasingly likely to be organized around teams rather than individual jobs (Kozlowski & Bell, 2003). These may be short-term project teams or longer-term self-managing teams. Often they include people with diverse skill sets; cross-functional teams are deliberately constructed to include representatives from different functional areas that have a stake in the team's product. Teams are thought to have motivational, productivity, and quality advantages, and some believe they result in increased efficiencies (Cordery, 2003). The diversity implication is that group interaction across differences will increasingly be required.

At the same time, a significant portion of US workers have jobs with only tenuous connections to a particular workplace or group of coworkers. At minimum about 4% of the labor force do not have a contract for ongoing employment, either implicit or explicit, and often are short-term (USBLS, 2018). As many as 30–40% of employees are *contingent or alternative workers* when this term also includes independent contractors, on-call workers, employees of temporary help agencies, or employees of contract firms that place them with another company (Maurer, 2018; US Government Accountability Office, USGAO, 2015). At this time, estimates of the growing number who work in electronically mediated employment (i.e., jobs arranged and perhaps completed online) and in other parts of the "gig" economy (e.g., ride-sharing) are inadequate (USGAO, 2019). In addition, data show a large group of voluntary or involuntary part-time employees, some of whom have more than one job (USBLS, 2019c). From the diversity perspective, contingent and alternative employees have little time to learn to adapt to a new work setting and develop trust in coworkers. Adaptation is more challenging even for the core noncontingent workforce as others come and go. In addition, differences in pay or benefits of regular and contingent/alternative employees may be a source of potential friction.

Finally, compared to the post-World War II generation, today's workers experience employment as less stable. In January 2020, the median length of employment with the current employer was only 4.1 years (USBLS, 2020). US workers born between 1957 and 1964 held an average of 12.3 jobs from ages 18 to 52 (USBLS, 2019a). Job instability increased due to the 2008 recession and the 2020 pandemic, and technological change has led to skill obsolescence and necessary retraining or replacement of employees. Organizations have reduced employment rolls by downsizing or merging with other companies. As people move through jobs more frequently, there is an increased need for flexibility in adapting to new faces at work.

THE *BUSINESS CASE* FOR DIVERSITY

As the field matured, practitioners and scholars saw that if diversity initiatives were to succeed in work organizations, a convincing business rationale would be needed to show that this work should receive resources and administrative support. Robinson and Dechant (1997) explained that "Other business initiatives that present more compelling, factual evidence of payback on investment win out over diversity initiatives, which seem to offer less predictable and tangible benefits" (p. 21). This led to development of the DEI *business case:* Good diversity management leads to increased company profitability. This is also called the *bottom line* argument because it claims that good diversity management will improve the organization's bottom line on the profit and loss balance sheet. A related term, the *value-in-diversity* perspective, proposes that diversity is good for organizations, in contrast to the view that diversity is harmful to cohesion, communication, and productivity. Effective diversity managers

must be able to articulate a business case for activities needed to manage DEI effectively in their company. What are the arguments for the business case?

Cox (1997) outlined conceptual arguments to justify diversity management efforts in terms of organizational profitability. He proposed several factors leading to increased revenue for an organization that manages diversity well. Note that these are not just arguments in favor of *diversity*; they argue for good *diversity management*.

1. Marketing strategy. Companies that are internally diverse will be more effective in understanding their increasingly more diverse customer/client base and probably make fewer ethnicity-related public relations blunders. A company seen as "doing diversity well" has a public relations advantage. (For another perspective on marketing, see the shaded box.)
2. Resource acquisition. Talented minority applicants—and others—may be more likely to accept employment with a company seen as being *diversity friendly*. Employment benefits and procedures to address concerns of underrepresented groups may also be attractive to high-ability employees from other backgrounds.
3. Better problem-solving. Varied experience and knowledge of diverse employees should produce a wider range of information and alternatives and better critical analyses. Group dynamics must be managed well for this to happen.
4. More creativity and innovation. This also should follow from the wider range of information and experience, but only if group processes are managed so that innovative ideas can emerge and compete for adoption.
5. Greater *system flexibility* (Cox & Blake, 1991). This term derives from Open Systems Theory, discussed in Chapter 2. An organization that is more diverse internally should be able to adapt more quickly to changed external conditions such as competition, changes in the economy or the labor market, or new laws or regulations.

MISUNDERSTANDING THE BUSINESS CASE CAN BE COSTLY

Focusing on simple demographic diversity without considering inclusion can be a big mistake for businesses that may succeed in increasing representational diversity, but in a way that creates unfair discrimination against members of underrepresented groups. Labor economists Bendick et al. showed how this can easily happen when employers engage in the "perverse practice" of matching employees to customers and markets similar to them in terms of ethnicity or sex (2010, p. 468).

Bendick et al. dissected one aspect of the business case: the idea that increasing diversity will improve a company's ability to market effectively to a more diverse customer base. They argued that focusing on diversity alone, rather than workplace inclusion, is a serious error that can place a company at legal risk. How can this happen, if one supposed benefit of diversity is reduced harassment, discrimination, and legal challenge? These authors gave actual examples from their research with a large grocery chain and from data on the advertising industry. Here's how it could happen.

"Neighborhood Stores" (fictitious name for a real company) did a very good job of recruiting African Americans into entry-level management positions, showing much better results than the industry average. However, the corporation seemed to assume that these ethnic minority managers would do especially well in stores located in neighborhoods with many African American residents. These managers were much more likely to be assigned to minority neighborhoods (including Latino or Asian) and less likely to work in White and/or more affluent neighborhoods

than would be expected from their actual numbers. Because they were not matched to their customers in socioeconomic class, income, residence, and sometimes even ethnicity, the supposed marketing advantage of hiring them was likely reduced.

But more troubling was the fact that this assumption led to African American managers being disproportionately assigned to "career killer" stores with lower square footage, lower total sales, higher rates of theft by customers and employees, and more danger from crime and stress. Sales and shrinkage (loss of inventory, e.g., from theft) were important for performance ratings and bonuses. In addition, these managers were more likely to be overworked and thus less likely to complete assigned training exercises that were required for promotion! According to Bendick et al., "African American managerial employees on average received lower performance ratings, earned less, took longer to be promoted, and voluntarily quit the company sooner than their white counterparts" (p. 475). Eventually, this led to a class action lawsuit, which the corporation settled quickly in order to reduce its financial risk and avoid losing public goodwill. The African American employees received considerable compensation, and company employment practices were changed.

The authors pointed out another flaw in the company's diversity strategy. Because these employees were likely to resign before reaching the store management, regional, and corporate levels, the presumed benefit of their ethnic knowledge was lost, and they did not contribute to innovation, flexibility, or creativity.

Bendick et al. also analyzed data from the advertising industry that was consistent with "the assumption that African Americans can be useful in advertising only in dealing with African American consumers and … associated products" (2010, p. 478). African Americans in advertising are likely to work in agencies with predominantly non-White employees and that specialize in targeting minority markets. When in other agencies, they are less likely than Whites to hold powerful and prestigious positions and to earn high incomes. (This was also true for women in comparison to men.) "Managers appear willing to credit white individuals with flexible or generic skills applicable in promoting a range of products to a range of market segments … (but for African Americans they) discount such general skills, instead basing hiring, promotion, and assignment decisions solely on these employees' presumed understanding of their own racial group" (p. 479). This occurs despite the fact that these advertisers do not resemble their target audience in education, socioeconomic status, skill, or experience. According to the authors, "the guiding mindset is: All blacks know blacks, and they know nothing else" (p. 480).

These examples of "diversity without inclusion" (p. 481) show the problems that result from failure to incorporate those from underrepresented groups on the same terms as majority individuals. In an inclusive workplace, everyone is treated equitably and is equally able to access resources and opportunities and thus contribute to the success of the organization as well as themselves. Perhaps we should talk about the *business case for inclusion and equity* as well as for diversity.

Cox (1997) also proposed that well-managed organizational diversity can reduce an employer's costs, thus leading to an increase in profitability. He lists several factors:

1. Lower absenteeism and turnover. Although diversity has been shown to increase withdrawal behaviors for minority individuals, if it is managed well, this should shrink.
2. Reduced barriers to communication. In a well-managed diverse organization, sexism and racism should be lower and more opportunities should exist for members of underrepresented groups and others to contribute meaningfully.

3. More efficient and effective communications. Good diversity management should help avoid losses due to differences in language, communication style, and openness to feedback. Unmanaged, those can lead to dysfunctional silences and impaired flow of information.
4. Reduced harassment. Costs of lost productivity, absenteeism, turnover, and conflict can be very high. If intergroup relations are harmonious and harassment seldom or never occurs, costs should be lower.
5. Fewer discrimination lawsuits. Even if a company wins a legal challenge, costs are incurred for attorneys' fees, the time required to deal with the situation, and stressful work environments. If employees' case is strong, very high costs may be involved in settling the case or paying fines or damages. Fair and open treatment of employees regardless of protected class status should reduce these costs.

EVIDENCE FOR THE *BUSINESS CASE*

Arguments like these suggest that paying attention to the management of differences among employees should be a cost-effective strategy. Some of these predictions are borne out by studies of small groups in laboratory settings, but when researchers try to test these ideas in actual organizations, they sometimes but not always find support for the predictions.

We should not underestimate the difficulty of establishing convincing empirical evidence for the economic success of DEI initiatives in actual work organizations. In laboratory experiments, treatments can be applied systematically and outside events can be controlled. In contrast, DEI work is implemented in the messy real-world setting. Many things are going on simultaneously (e.g., changes in the economy, technology, key people, or product lines), so it is difficult to determine the factors that alone or in combination may have caused various outcomes. Benefits from DEI interventions can be undone by other events such as a new IT system or increased competition. The same intervention, such as diversity training, maybe implemented differently each time it is offered as a function of particular individuals involved and dynamic contexts in which they work. With this in mind, what is the evidence for the business case?

First, surveys of HR and diversity professionals usually show that they believe programs for DEI are effective. For example, in a survey of HR professionals by SHRM and *Fortune* magazine, a majority reported benefits to organizational culture, employee recruitment, client relationships, creativity and productivity, and lower interpersonal conflict as a result of diversity initiatives (Bowl, 2001). Although these results are encouraging, they are opinions of people who may be responsible for starting or managing the programs they are evaluating.

Second, advocacy groups and consulting organizations have published the results of large-scale studies comparing the top and bottom quartiles of ranked companies to investigate diversity's link to performance. Catalyst, a nonprofit corporate membership organization focusing on women and business, has published research ranking Fortune 500 companies based on the representation of women in higher management. When top and bottom fourths of these companies were compared, those with more women at the top showed higher financial performance in terms of dollar returns to shareholders (Catalyst, 2011). Although these measures of diversity were narrow, and the studies do not tell us *why* the results occurred, in these cases, better financial performance did correlate with having more women in top management.

Similar work has been published by the consulting firm McKinsey & Company (Hunt et al., 2018) based on a dataset of more than 1,000 companies worldwide. Their studies ranked companies on measures of gender or ethnic diversity and found decreased likelihood of profitability for those in the bottom quartile. In another example, a global survey of almost 22,000 firms found correlations between women's representation in corporate management and various measures of firm profitability (Noland et al., 2016). Even the United States House of Representatives Committee on Financial Services has drawn supportive conclusions about the evidence for the business case from the studies of this type (US House of Representatives, CFS, 2019).

Third, academic researchers have also studied the bottom line. For example, a group of business professors found that corporations' stock prices rose after they received AA awards from the Department of Labor (DoL) and declined following penalties related to discrimination claims (Wright et al., 1995). In another study (Richard, 2000), either racial or cultural diversity alone was unrelated to measures of firms' financial performance. However, firms with a growth strategy were more successful when more diverse. For firms that were downsizing, higher racial diversity was associated with lower productivity. This suggests that diversity's effects may depend on contextual factors in the organization, such as increasing opportunities associated with company growth.

Several studies have found that gender or racial diversity within a company is related to other positive outcomes. For example, Frink et al. (2003) found that firm performance increased as employment of women reached 50%, after which it decreased; thus, maximum diversity was associated with the best performance. In their second study, firms' income profitability (but not their productivity) was positively associated with the percentage of female employees, but only in service and sales organizations. Like the studies above, this suggests that the relationship of diversity to financial results is complex and limited by contextual factors.

An archival research method was used by Herring (2009), a sociologist who analyzed survey data from a national sample of business organizations collected in 1996–1997. He found that racial diversity was associated with higher sales revenue and market share, more customers, and greater relative profit. Gender diversity was associated positively with sales revenue, customer, and relative profits. Furthermore, in four online experiments, researchers found evidence that advertised gender diversity may improve a company's reputation among White men (Wilton et al., 2019).

Complex results were found by researchers who examined racial and gender diversity and business performance in four large firms in a study sponsored by the Diversity Research Network (Kochan et al., 2003). They found few direct effects of diversity on performance, either positive or negative. However, evidence showed that (a) racial diversity could enhance performance if the organization encouraged learning from diversity; (b) gender diversity sometimes had positive effects; (c) negative effects of diversity could be reduced by training and development activities; and (d) gender diversity was associated with fewer problems than racial diversity (however, women were generally more numerous than racial minorities). Researchers concluded that attempts to manage diversity had generally worked to reduce negative outcomes and that under some conditions, well-managed diversity may improve performance.

Finally, Eagly's rigorous review of extensive research on (a) women on corporate boards; and (b) racial and gender diversity in workgroups reported that "research findings are mixed, and repeated meta-analyses have yielded average correlational findings that are null or extremely small" (2016, p. 199). Eagly advised that better understanding is needed of conditions that lead to positive or negative diversity effects and the social justice gains diversity

may produce. Similarly, Hoobler et al., (2018) found equivocal results in a meta-analysis of research on women's representation in corporate leadership. They concluded that firm performance, especially sales performance, may be affected by the presence of women in leadership. Notably, firms with women CEOs were especially successful in gender-egalitarian firm cultures. Comprehensive studies such as these have begun to show conditions under which diversity is most likely to be associated with favorable outcomes and begin to suggest *when and why* DEI is beneficial. DEI initiatives may be more effective in hospitality vs. non-hospitality industries (Singal, 2014); in nonfamily businesses and with nonfinancial measures (Chadwick & Dawson, 2018); and in cross-sectional vs. longitudinal analyses (Oberfield, 2014).

Deborah Litvin (2006) tried to "make space for a better case" for DEI by challenging the assumption that it must be justified in financial terms. She criticized the studies of financial benefit and suggested that the management of DEI should be justified on the basis of learning, personal development, and happiness of those working in organizations. A related ethical or moral argument is that *it's the right thing to do.*

Similarly, on the basis of their extensive study described above, Kochan et al. (2003) recommended revising the business case: "Diversity is a reality … today. To be successful … requires a sustained, systemic approach and long-term commitment. Success is facilitated by (considering) diversity to be an opportunity … to learn from each other … and an occasion that requires a supportive and cooperative organizational culture as well as group leadership and process skills" (p. 18). In other words, representational diversity does not by itself make an organization more profitable. However, diversity is a reality, and its potential negative impacts can be alleviated and sometimes reversed by climate, leadership, and interactional skills. This is a good transition to the rest of our text.

LOOKING FORWARD

In the following chapters, we will cover additional fundamental concepts and information related to DEI (Part I), followed by the consideration of how organizations work in terms of their structure and process (Part II). Next, these ideas are applied in contexts such as legal challenges and diversity based on various dimensions of difference (Part III). Our text concludes by considering possible solutions for managing DEI effectively (Part IV).

NOTE

1. This section draws heavily on Hays-Thomas (2004).

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Chapter 2

Conceptualizing and Measuring Difference

THE preceding chapter showed the importance of increased workforce diversity in the growth of the DEI movement. Demographic diversity, especially sex and race, is probably the diversity that people notice most quickly and most often. However, it is not the only diversity that is important for inclusion, productivity, and organizational success. Before discussing other diversity dimensions, we will consider how diversity is understood in work organizations. Not everyone agrees on the meaning of diversity and what should be done about it.

MODELS: CLARIFYING WHAT WE MEAN

Sometimes to understand a complex situation, a *model* can illustrate clearly and simply the variables believed to interact in that situation. Models are usually proposed by scholars as a statement of what they think is important, based on research or experience. Because models simplify, they are necessarily incomplete. They may or may not be accurate and should be tested as they are applied. A good model will:

1. Identify factors and relationships thought to be important.
2. Communicate these ideas clearly.
3. Assist us in remembering important variables.
4. Estimate or predict what will happen if something changes, and guide actions taken to alter the situation.
5. Suggest things that have been overlooked or not fully understood.

The "Culinary Model" of Organizational Diversity

An early metaphor for diversity was the "jellybean model" described by the late Roosevelt Thomas (1996), who imagined a jar of jellybeans that are all one color. Next, jellybeans of other colors are added. Is this diversity? According to Thomas, some people identify the *new* colors as the diversity in the jar. He said instead that diversity refers to the *whole mixture of different colored beans.* Someone concerned with diversity will consider not only the new and different persons but the entire social system and the differences represented within it. Which jellybeans are "diverse"? The red, yellow, or black ones? No—the mixture itself is diverse.

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Thomas's jellybean metaphor clarifies that diversity pertains to the collective but is inadequate on another point. When we add jellybeans of different colors to the jar, each bean retains its own color and flavor and is not affected by its proximity to other beans. However, in social settings, people who are different *do* influence one another. People learn, react positively or negatively, conform, develop friendships or cliques, and in other ways, develop or reject relationships with others who are different. This simple metaphor shows an important aspect that has been omitted.

Jellybeans can be eaten one at a time, maintaining the separate flavor of each color. But in a *salad*, the lettuce, cucumbers, tomatoes, and other ingredients are tossed and usually eaten together, accented by a dressing that unites them. Ingredients contrast with and complement each other. Most diners would probably find a bowl of lettuce less interesting than a good tossed salad; the various components make the mixture more diverse, colorful, and tasty. Components retain their own shape, color, and texture; still, someone who *really* did not like cucumbers could pick them out of the salad. This diversity metaphor shows that components, though better in combination, retain their own individuality and, in some sense, remain separate. Is this what diversity means?

Consider, in contrast, a bowl of stew or chunky soup. The meat and vegetables have been cooked together, so the various parts are still identifiable in taste and texture. However, unlike a salad, each is affected by the presence of the others in a way that cannot be undone by removing one of them. The delicious gravy is the product of the collective simmering and gives character to the mixture that is *different* from that of the individual ingredients. Even if onions are removed, their pungent flavor would already have affected the taste of the other components and the gravy. This is yet another image of organizational diversity.

Compare this with tomato sauce, in which the ingredients have been combined and cooked together until they blend into one homogenous thick substance differing from any of the components. Tomatoes and onions and garlic can't be found anymore; they have been completely blended or assimilated into the new substance. The familiar *melting pot* expression implies that new ingredients (people) are absorbed into the sauce or culture of the old so that their original attributes are no longer recognizable.

Which best represents organizational diversity? Some organizations behave as if it is sufficient to just add new people who are different, like jellybeans. Nobody has to change or even interact much with others. The salad bowl version of diversity seems applicable in other settings because different kinds of people are *represented* but don't really adapt to be part of the larger group; they still retain a high degree of separateness. In other cases, diversity means that people with differing backgrounds join together in a way that maintains some aspects of individuality and separateness while creating a new milieu to which all contribute, like a good stew. Sometimes diversity is expected to eliminate major differences among people so that everyone becomes equally a part of the wider whole, like a tomato sauce. In other cases, *assimilation* is only expected for newcomers or certain kinds of people in the organization who are not from the predominant group. (Note that it's called *TOMATO* sauce, which identifies the "dominant majority" in this combination.) A key variable is the *process* by which people become part of the larger group: Who is expected to change, and to what degree? This simple culinary model highlights a basic puzzle in the field of diversity management.

Scholarly Models of Organizational Diversity

Early models categorized organizations according to their approach to DEI; usually, categories differed in how diversity was conceptualized and the dominant process by which

newcomers changed. Later more complex models proposed a set of interacting processes that produced outcomes relevant to DEI. In contrasting the simple models in this first group, consider (a) the desired end state that is implied; (b) the process and direction by which change occurs; and (c) whether the organizational types seem to be *stages.* In psychology, this word implies *qualitatively different periods* occurring in a *fixed chronological order and rate.* Regressing or *"going back"* once one has attained a particular stage is often a sign of problems in development or health.

Three Organizational Conditions: R. Roosevelt Thomas, Jr.

In his earliest book (1991), Thomas described three strategies for incorporating women and ethnic minorities into the business world. At that time, diversity issues were defined narrowly in terms of gender and race, and theoretical perspectives on diversity were just beginning to develop.

The first strategy, *Affirmative Action (AA)*, assumes that women and ethnic minorities have been excluded from full participation in organizations because of prejudice and that such restrictions are not economically sound, moral, or good public policy. This strategy implies that without intervention, that condition will not change. Therefore, some degree of coercion by laws and social norms is needed to effect change. Executives may work to eliminate blatant prejudice and comply with legal requirements, relying on AA training for White men and a "color-blind" approach (*passive scenario*). Out of concern about corporate social responsibility as well as legal requirements, they may increase outreach and programs aimed at assimilation of underrepresented groups (*pipeline scenario*). If that does not improve retention, they may develop stronger AA and special programs to deal with bias in the organization's policies and procedures (*upward mobility scenario*).

Thomas's second strategy is called *Valuing Differences (VD)* and builds upon an AA environment with activities to increase awareness of and respect for difference. Diversity is seen as an asset, and the goal is increased knowledge, acceptance, and tolerance. The VD approach could include *diversity days* highlighting food or culture of various ethnic groups, or activities emphasizing increased self-understanding and other-acceptance. However, those do not change the fundamental ways in which the organization operates.

The third strategy, *Managing Diversity (MD)*, recognizes that existing organizational systems (e.g., recruiting, hiring, performance appraisal) may prevent full incorporation of and benefit from people who are different from the majority. Still recognizing the need for legal compliance and AA, this strategy asks what must be changed for the organization to work smoothly and productively for everyone regardless of gender, ethnicity, or other bases of diversity. The MD strategy is a form of *organization development.* Because it requires systemic changes in fundamental procedures and policies, this strategy takes more time, commitment, and expertise than the other two strategies.

The AA, VD, and MD strategies reflect different levels of understanding and motivation to work with diversity as a basis for the organization's competitive advantage. Do they seem like stages in development of an organization's diversity responsiveness? Can an organization function at the MD level without passing through AA and VD first? Can an organization regress and, having functioned well at MD, later slip back into VD or AA? Who or what is the focus of change in each strategy? Figure 2.1 shows some questions that illustrate these strategies and might help an HR manager or diversity professional determine which best characterizes his or her organization.

1. Diversity is a non-issue in my organization.
2. In my organization, there's an emphasis on whether people will "fit in."
3. If a woman or non-White man is hired or promoted into a responsible position in my organization, people are likely to say it was because of affirmative action rather than the person's qualifications.
4. Our training on these issues focuses mainly on what's legally required or prohibited.
5. My organization's diversity efforts focus on improving the quality of interpersonal relationships among employees.
6. Our training focuses on appreciating cultural differences, such as music or food.
7. Management in my organization believes that we will get better ideas and more innovation if we hire people who are different from those already on board.
8. People of color are employed at all levels in my organization.

Key: items 1–2 indicate a pre-Affirmative Action organization; 3–4 Affirmative Action; 5–6 Valuing Diversity; and 7–8 Managing Diversity. Where does your organization fall? A diversity mature organization would probably fit items 7 and 8.

FIGURE 2.1 | Diversity diagnosis: organizational diversity strategies

Three Organizational Paradigms: Thomas and Ely

The premise of this model is that how diversity is managed and its implications for the organization depend on the perspectives or *paradigms* of organizational leaders. The *Discrimination-and-Fairness* paradigm emphasizes fairness and legal compliance as reasons to change the organization's employees and structure to become more representative of society. Recruitment and retention of a diverse workforce are used as indicators of success. According to Thomas and Ely (1996), this paradigm reflects leaders' emphasis on equal treatment and due process and a top-down approach to implementing change, as well as a clear and solidly established culture. Although this paradigm may lead to increasing employee diversity and more equitable treatment, its emphasis on assimilation and "culture-blindness" may also prevent the organization from learning and benefiting from its increasing diversity.

In the *Access-and-Legitimacy* paradigm, leaders work to increase diversity, thinking it will improve access and response to diverse customer bases, leading to better customer service and thus more business success. This paradigm is most likely when success depends on ability to respond to increased external diversity in potential employees or customers. This *bottom line* emphasis means that diversity initiatives will make sense to employees and likely have their support. On the other hand, it may lead to emphasizing observable characteristics of certain employees and assigning them to specialized work (e.g., AA officer or sales agent for minority accounts). Thus others do not learn from their expertise, and some may feel the organization is profiting from their difference by confining them to certain types of work or positions.

Some employers evolve to a more nuanced perspective on diversity, allowing them to benefit in expanded ways through the *Learning-and-Effectiveness* paradigm. Like *Discrimination-and-Fairness*, this paradigm promotes equal opportunity and fairness. Like *Access-and-Legitimacy*, it attends to those aspects that differentiate people in useful ways. But it goes beyond these paradigms by "internaliz(ing) differences among employees so that (the organization) learns and grows because of them" (Thomas & Ely, 1996, p. 86). For example, "maternity" leave designed for mothers may be adapted to "parental" leave to benefit more employees. Thus diversity's benefits extend throughout the organization as it becomes truly inclusive. Factors needed for an organization to use the *Learning-and-Effectiveness* paradigm

include organizational leadership and culture, as well as a structure that encourages innovation and sharing of new ideas.

Three Organization Types: Taylor Cox

A more complex perspective was suggested by Cox (1991, 1993/1994). Key to understanding Cox's typology are four types of *acculturation* (Cox & Finley-Nickelson, 1991). Acculturation refers to changes in norms, expectations, and other aspects of the cultures of two or more groups as they combine and adjust. First, in *assimilation*, members of the minority community are expected to adapt to the dominant group's culture, leaving their own behind. This has been an important form of acculturation in the history of the United States. For example, immigrant groups have been expected to enter the American melting pot, give up their native languages, and adopt the culture of communities they entered. Forced assimilation also occurred with Native Americans and with enslaved Africans brought to this country.

In contrast, when *separation* occurs, an incoming group resists adaptation and continues to function without significant change within pockets of the larger system. Some immigrant groups settle in *ethnic enclaves* and maintain their language and customs while interacting only minimally with the broader culture—often until the next generation. In the third acculturation process, which we will call *mutual adaptation*, change occurs in both directions. Each group adapts in some ways to the culture of the other. We might think of a good marriage or friendship as embodying this type of adjustment. Finally, the primary or receiving culture may weaken and be displaced by a confusing, chaotic, and unstable new reality through a process called *deculturation*.

Cox proposed that with respect to internal diversity climate (DC) three types of organizations differ in the pattern by which the minority is incorporated into the majority. First, Cox (1991, 1993/1994) described the *monolithic* organization as internally homogeneous in terms of culture and demographic characteristics. The few people who differ in sex or race are likely to be located together in certain parts or job categories of lower status in the organization. Organizational systems and norms reflect those of the dominant majority (usually White men), and others are expected to *assimilate* to this biased environment. For this reason, conflict is infrequent. In the US today, this form is probably rare, at least among large organizations subject to fair employment legislation or AA requirements. However, it may exist among small businesses or in private or religious institutions.

A second type, which Cox proposed is typical among large US organizations today, is the *plural* organization. Superficially diverse, this type has more members of different races and sexes, but they are likely to work mainly in certain areas or levels of the organization and socialize only on a limited basis across these divides. The organization may be technically compliant with AA and fair employment practices and have programs to recruit, hire, and develop persons from underrepresented groups. However, its HR systems remain biased. Influential managers are predominantly White males, and others are still expected to assimilate and adapt. Cultural differences and resulting resentments among employees, both majority and minority, produce tension and conflict. Though Cox does not say this, it seems likely that in this type of organization, there may also be separation as subgroups maintain their own ways while conforming superficially to the most important and public expectations of the dominant majority.

Third, in a true *multicultural* organization, which Cox believed is seldom fully realized, diversity is valued and appreciated. HR systems show little or no cultural bias; as different types of people spread throughout the organization formally and informally, both they

and the organization change in a process of two-way acculturation or mutual adaptation. Because diversity is valued and managed well, there is minimal conflict. The multicultural organization results from a conscious and deliberate pattern of two-way change as people and systems adapt to support an inclusive environment. This is probably an organizational ideal rather than a frequent accomplishment among work organizations.

Cox's model highlights processes by which different people move within parts of the organization. *Informal integration* refers to social and casual inclusion of different others into the organization, and *structural integration* refers to their placement in a variety of areas (e.g., departments, jobs, and levels) within the larger entity. When informal integration is high, people of different ethnicities, races, and ages would be found eating lunch together, socializing at company events, or participating together in organizational athletic or community service activities. With high structural integration, women or persons of minority demographic backgrounds are spread throughout the jobs, departments, decision-making bodies, and layers of the organization, including those which are most prestigious and highest paying.

Cox's Interactional Model

These ideas are part of a complex model depicting how diversity in an organization impacts the career outcomes of individuals and the overall effectiveness of the organization. This *Interactional Model* (Cox, 1993/1994) has been reproduced in Figure 2.2, slightly modified as described below.

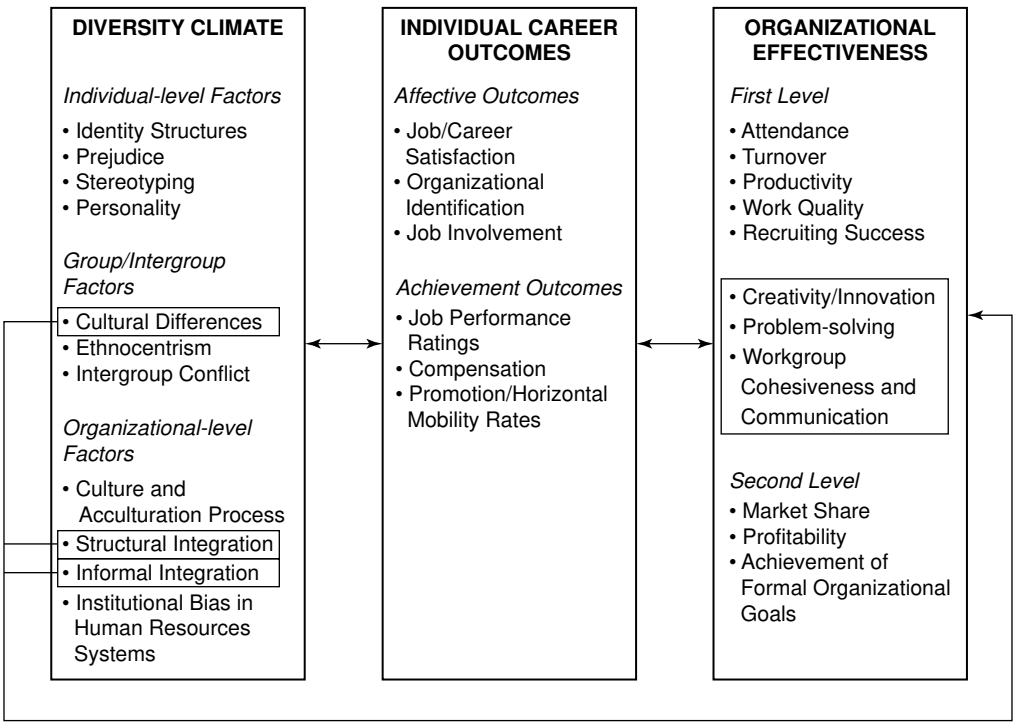

FIGURE 2.2 | An Interactional Model of the Impact of Diversity on Individual Career Outcomes and Organizational Effectiveness (adapted and reproduced by permission from Cox (1993/1994). *Cultural diversity in organizations: Theory, research, and practice.* San Francisco, CA: Berrett-Koehler Publishers)

Cox proposed that DC consists of three factors: behavior and characteristics of individuals *(Individual-Level)*, relations among organizational subgroups (*Group/Intergroup Factors)*, and aspects of the organization as a whole *(Organizational-Level Factors).* DC affects Individual Career Outcomes, which in turn influences Organizational Effectiveness. The effect of DC on organizational effectiveness is *indirect* (shown by short interior arrows) because it works *through* impacts on individuals in the *Equal Opportunity and Motivation to Contribute* process. That is, DC leads to Career Outcomes that consist of feelings *(Affective Outcomes)* and objective success *(Achievement Outcomes)* for individuals, which in turn influence overall organizational effectiveness.

In addition, some aspects of DC and Organizational Effectiveness are shown within small boxes to indicate *direct* impacts. That is, Cultural Differences and Structural and Informal Integration also have direct impacts on Organizational Effectiveness by altering Creativity and Innovation; Quality of Problem-solving; and Workgroup Cohesiveness and Communication. This direct effect operates through the *Value in Diversity* route and is indicated by the long external arrow around the bottom of the model.

But couldn't some effects be bidirectional? This possibility is shown by the double-headed interior arrows (modified from Cox, 1993/1994). For example, if achievement outcomes are low for individuals from underrepresented groups, this could impact Prejudice, Stereotyping, Intergroup Conflict, Structural and Informal Integration, and other DC factors. Further, any diversity-related changes in turnover rates, recruiting success, or profitability might influence things like individuals' Job Satisfaction and Levels of Compensation, which in turn affect aspects of DC.

Together, the Cox models present a typology of organizations and describe processes by which diversity in organizations (or lack thereof) impacts the level of success of individuals *and* of the entire organization. The Interactional Model identifies factors and indicators that could be used to test the effects of increased organizational diversity. Acculturation processes are highlighted as a critical indicator of DC, and the models show that diversity creates many and complex effects at different levels within the organization.

How do they differ from the earlier models? How would the Interactional Model operate in the three organizational types? Could these models be used to diagnose diversity strengths or problems in an organization? Is anything missing or unnecessary?

Scholarly Models of Diversity Management

The models discussed above conceptualize how diversity functions in an organization. Other models of processes in management of DEI are discussed in later chapters. These include models of *diversity competence* for individuals and organizations (Cox & Beale, 1997) and organizational change models (Agars & Kottke, 2004; Cox, 2001). Next, we turn to ideas about different sorts of diversity.

DIVERSITY CONSTRUCTS: THE NATURE OF DIVERSITY

Surface- vs. Deep-Level Diversity

Early models implicitly conceived of diversity as based on demographic characteristics such as racio-ethnicity or sex. However, some scholars considered diversity more broadly. Social psychologists Jackson et al. (1995) distinguished between easily detectable differences and

underlying attributes with implications for the group's task, internal relationships, or both. Their organizing framework showed how *content* (the differences themselves, e.g., age, skill) and *structure* (how differences are distributed) could change individual and social processes, thus altering behaviors and outcomes. Management researchers Milliken and Martins (1996) differentiated between diversity in observable characteristics and diversity in attributes that appear only with extended interaction (e.g., functional background, personality) and modeled how diversity could affect the outcomes for individuals, groups, and organizations.

This distinction between apparent and underlying differences was popularized by Harrison et al. (1998) in their study of *surface-* and *deep-level* diversity and social cohesion of small work groups. Surface-level diversity referred to visible differences among people (e.g., age, disability status), and deep-level diversity concerned differences that became apparent as individuals interacted, such as personality, cognitive skills, attitudes, or values. In their research in hospital and deli-bakery settings, work group cohesion was *negatively* related to surface diversity (age, sex, and racio-ethnicity) for short-term groups. However, when groups worked together longer, the effect of surface diversity declined, and deep-level diversity became more important in understanding work group cohesion. Think about a group situation in which you did not know the people very well. What were your initial impressions of others? On what were they based? Did your views of others and your relationships change over time?

Separation, Variety, and Disparity

As more research on diversity's effects was published, results were inconsistent. Sometimes diversity led to better group performance, sometimes not. Inconsistent research results occur when hypotheses are simply wrong, when important variables have been omitted or treated in different ways, or when further conceptualization is needed. Harrison and Klein (2007) suggested it was time to step back and reconceptualize what diversity meant.

First, Harrison and Klein clarified that "diversity" applies to a group or collection, not to an individual. If someone says, "30% of our students are diverse," it suggests the speaker is not well informed about DEI. (Usually, the person means that 30% are people of color.) "Diverse" does not mean "minority." Consider that most students at a historically Black college or university (HBCU) may be Black, and thus some HBCU student bodies may not be very diverse.

Harrison and Klein described three types of diversity called *separation, variety*, and *disparity. Separation* occurs when people differ *quantitatively* along one dimension, such as liking for football. Separation usually characterizes attitudes, opinions, or values with which people may agree or disagree to different degrees. Harrison and Klein predicted high separation, especially about group goals or values, would result in interpersonal conflict, lack of trust, and lower task performance. *Variety* occurs when there are *qualitative* differences among group members, usually in knowledge, skill, or information. For example, one member writes very well, another has much technical knowledge, and a third is skilled in managing people. High variety was predicted to lead to more creativity, innovation, flexibility, and higher quality decisions, but more conflict about the task. Third, *disparity* occurs when some individuals have much more of a resource valued within the group, such as money, power, status, or authority. Wide disparity was expected to produce competition, resentment, and withdrawal by some members. Harrison and Klein showed that inappropriate conceptualization of diversity could lead to misleading measurement and inconsistent research results.

The lesson for the diversity manager is that diversity has complex effects. Diversity in attitudes and values implies emotional conflict in the group's interaction, but skill or information diversity has quite different and potentially positive effects. Inequality of valued assets may lead to powerful or deferential behaviors. In the Harrison and Klein framework, demographic diversity is considered a proxy for one or more of these types of diversity, meaning that people *assume* that demographic difference implies other differences. That is, we often assume that surface demographic differences indicate different attitudes and values, skills and information, or power and other valued assets. In other words, we stereotype.

INVESTIGATING VARIOUS TYPES OF DIVERSITY

This section reviews several sources of information about types of diversity of interest to diversity professionals and some methods used to study them. Research discussed in this text uses these sources and methods to investigate how best to manage DEI in a work organization. Because demographic variables are central in the diversity movement, we begin with methods and sources of data about racio-ethnicity, sex, age, disability status, and religion, all topics of later chapters. Diversity professionals should be knowledgeable about several different demographic measures:

- The overall population of the United States and relevant geographic areas.
- Projections or estimates of how the population is expected to change in the future.
- The labor force, which includes only working age adults. Because of differences in age cohorts of different groups, the labor force is not simply a smaller version of the population.
- Labor force participation (LFP) rate, which varies for different sexes, ethnicities, and ages.
- Projections of LFP based partly on current trends for different demographic groups.

Demographic Information about the US Population

The US Census Bureau (USCB) is the source of a wealth of information about residents of the United States. This bureau is part of the US Department of Commerce and collects data in the Decennial Census, the American Community Survey, the Economic Census, and other surveys. The USCB also conducts the Current Population Survey (CPS) for the Bureau of Labor Statistics (BLS) in the Department of Labor (DoL), and the BLS itself manages the monthly Current Employment Statistics survey. Aggregate data from these sources provide snapshots of the demographic, business, or economic makeup of a local area, region, or state, as well as the country as a whole. In addition, some nonprofit organizations or businesses conduct surveys of various demographic characteristics such as religious affiliation or disability status.

Diversity professionals will find this information useful in many situations. For example, data on labor force characteristics can be used to compare one's organization with the local area and with other businesses, estimate the availability of various kinds of workers, plan business locations and recruitment near centers of available labor or customers, and estimate future training needs. Affirmative Action Plans (AAPs) use information about the availability of different categories of employees based on demographic, educational, and other data. Table 2.1 summarizes these surveys and the kinds of information they provide. The USCB

TABLE 2.1 | Useful Federal Government Data Sources about People and Work

	Decennial Census	*American Community Survey (ACS)*	*Economic Census*	*Current Population Survey (CPS)*	*Current Employment Statistics (CES)*
When?	Each ten years	Yearly	Each five years in years ending in two and seven	Monthly	Monthly
About whom?	Entire country	Sample of households	Large, medium, and multi-site businesses and sample of small businesses	Sample of households	Sample of nonfarm businesses and government agencies
What?	Short form: demographic information Long form: more details	Demographic questions; many items about how people live	Information about businesses	Employment and unemployment; earnings; labor force characteristics	Employment, work hours, earnings
Publishing Agency?	US Census Bureau (USCB, 2021c)	US Census Bureau (USCB, 2021e)	US Census Bureau (USCB, 2021d)	Census Bureau, for the Bureau of Labor Statistics (USCB, 2021b)	US Bureau of Labor Statistics (USBLS, n.d.-a)
Why?	Reapportionment of US Congress, state legislatures; allocation of federal funds; siting of public facilities, and more	More frequent updates, more detailed information than Census	Forecasting and operation of business and economy	Frequent snapshots of current labor force	Frequent snapshots of economy

and BLS websites give overall tabulations and other tables broken down by age, sex, and other variables, as well as periodic reports on relevant topics.

The surveys mentioned here are collected and analyzed nationally and also compiled for regions or local areas. State and local agencies use these data sources and may also collect their own data. These sources provide extensive and very useful information, but data collection follows a standard format and may not conform to the specific needs of individual diversity managers. In addition, time is required to conduct analyses before new reports become available, and due to the schedule for conducting the various surveys, specific types of information may not seem current at the time they are needed. When sociologists and other social scientists conduct extensive analyses of Census information, their articles may not be published until several years after data were collected. Unfortunately, the 2020 Census experienced much disruption as a result of the 2020 pandemic and political factors. Although the regular response period ended October 15, 2020, today the latest available data come not from this Census but predominantly from regular data collection and estimates between decennial censuses. Readers may wish to explore the Census website for updated statistics.

USCB data are the basis for population estimates of racio-ethnic groups discussed in this chapter. Census categories also suggest the general cultural understanding of these

distinctions in the United States at ten-year intervals. For the first time in 2000, the Census allowed respondents to indicate multiracial status by choosing more than one alternative. Respondents could check whether they were *Spanish/Hispanic/Latino.* If so, they could choose from *Mexican/Mexican American/Chicano, Puerto Rican, Cuban*, or *Other Spanish/Hispanic/Latino* and could print in the name of a group not listed. The next question asked about "one or more races" with alternatives of *White*; *Black/African American/Negro*; *American Indian/Alaska Native;* or 11 categories of Asian origin (e.g., Asian Indian, Chinese, Filipino, Native Hawaiʻian). American Indians and Alaska Natives were asked to print their tribes, and there were spaces for names of other categories of *Asian/Pacific Islander* or other races (Jones & Smith, 2001).

Ten years later, the 2010 Census form specifically noted that Hispanic origins did not imply "race" but otherwise used the same questions to assess Latino heritage. The race item provided the same choices as the 2000 Census form but provided several examples of *Other Asian* (e.g., Hmong, Laotian, Thai, Pakistani, Cambodian) and *Other Pacific Islander* (e.g., Fijian, Tongan). As in 2000, the Census form allowed one or more race boxes to be checked (USCB, n.d.-c). In the 2010 Census, for those reporting one race, the largest population group was White (72%). Blacks constituted 13%, with smaller percentages choosing Asian (5%), American Indian/Alaska Native (0.9%), and Native Hawaiʻian/Other Pacific Islander (0.2%). Hispanics (of any race) were about 16%, and 3% chose more than one race (USCB, 2011).

After extensive study, the Census Bureau recommended two changes to adapt to changing respondent self-perceptions. First was rewriting census questions about race and Hispanic origin so that those who considered "Hispanic" to be their racial group could indicate this. Also recommended was a new racial category for "Middle Eastern or North African" separate from both White and Black. However, neither change was made, and the 2020 forms used the same categories as the 2010 Census (Alba, 2018; Wang, 2018).

Two things are noteworthy over time: (a) the increasing variety of responses expected from people asked to identify their own racio-ethnicity and (b) the USCB's distinction between Hispanic/Latino ethnicity and the several "race" categories. In designing the questionnaire, the CB queried the public about various terms. Some objected to the word "Negro," but many of African descent preferred that option. Black respondents were given no way to indicate whether they were (a) an American descendant of the enslaved; (b) from a Caribbean Island or other place; or (c) born in Africa or descended from Africans not enslaved in the United States. Those of Hispanic and Asian heritage had many options. What could be the rationale for listing many alternatives for those of Latino or Asian heritage but not for Black individuals?

The 2020 Census revealed that the US population has grown and become more diverse in racio-ethnicity since the 2010 Census (Jones et al., 2021). Specifically, those identifying as Multiracial (two or more races) have *increased from 2.9% to 10.2% of the population in 2020.* (This could be due to population changes or to increased willingness to mark this category.) Although the White (alone) population remains most numerous, this group has decreased from 72.4% of the population to 61.6%. The Hispanic/Latino population grew from 16.3% to 18.7%, and the Asian population from 4.8% to 6%. Although the Black/African American population grew in size, its percentage changed little, from 12.6% to 12.4% between the censuses. American Indian and Alaska Native (0.9% to 1.1%) and Native Hawaiʻian (0.2% and 0.2%) populations also remained stable percentagewise. Those reporting some other race grew from 6.2% to 8.4%.

Recent Census Bureau data have found that the US population is almost evenly divided between males (49.2%) and females (50.8%), unchanged since the 2000 Census. The population

grew in size about 9–10% between 2000 and 2010 and another 10.1% (among adults over 18) by 2020. The population also became older, with median age rising from 35.3 years in 2000 to 37.2 in 2010 and 38.2 in 2018, before deaths from the COVID pandemic (Howden & Meyer, 2011; Ogunwole et al., 2021; Rogers, 2019; USCB n.d.-b).

The nonprofit and nonpartisan Public Policy Research Institute (PPRI) has published the results of a national survey of religious affiliation. In 2020, the largest single group (70%) was Christian, with almost 5% identifying as affiliated but non-Christian. Almost one-quarter of respondents (23%) are not religiously affiliated. Among Christians, various Protestant denominations accounted for 46.5% of respondents, and 22% identified as Catholic. Other religions (Jewish, Buddhist, Muslim, and Hindu) were 4–5% of respondents (PPRI, 2021).

The American Community Survey provides information about disability status. Of the total noninstitutionalized population in 2019, 12.7% reported having a disability. Among working age adults aged 18–64, this figure was 10.3% (USCB, n.d.-a, Table DP02). The most common disabilities are cognitive and ambulatory difficulties (USCB, 2021a).

Population Projections

Based on the 2010 Census, the US population was expected to grow more slowly and become older and more racio-ethnically diverse during the next 50 years (USCB, 2012b). The percentage of the population that is White alone (including Whites of Hispanic heritage) was expected to drop from 78% in 2012 to 69% in 2060, but percentages of all other groups were expected to increase over that time. These projections are close to the trends shown in preliminary analyses of the 2020 Census. Many things could alter these estimates, including changes in fertility, life span, immigration policy, or death rates from various causes (such as the 2020 pandemic).

Other projections indicate that around 2045, the country will probably become majority-minority for the first time (with mixed-race individuals and Whites who identify as Hispanic categorized as "minority" even if they appear to be White; Alba, 2018). Around that year, non-Hispanic Whites will remain the largest single category, but all other groups combined will be more than half the population. By 2045, the total minority population (including Hispanics who are White) is estimated to be 50.3%, more than half of the total population. For the youngest members of the labor force (18–29), all minorities combined are expected to outnumber Whites in 2027 (Frey, 2018).

The US Labor Force

The USCB/BLS define the labor force as consisting of the civilian population 16 years of age or older who are not institutionalized (in a medical or care facility or in prison) and are working or looking for work. Although both employed and unemployed persons are included, the labor force does not include students, retirees, active duty military, or others not looking for work due to illness, disability, choice, or because they are *marginally attached*. This term applies to persons who are available for work, want to work, and have looked for work within the preceding year but not in the four weeks preceding the CPS data collection. Some of the marginally attached are *discouraged workers* who have been looking unsuccessfully for employment but, finding none, have given up. Because of age and LFP differences for men and women in various racio-ethnic categories, the labor force has a different demographic distribution than the population as a whole.

Data on US labor force composition show:

- 47% women and 53% men in 2020 (USBLS, n.d.-c).
- In 2020, 77% White, 13% Black, 6% Asian, 1% American Indian/Alaska Native, and a smaller percentage Native Hawaiʻian/Other Pacific Islander workers; about 2% two or more races; about 18% Hispanic or Latino ethnicity (USBLS, 2021c). Percentages do not add to 100% because those identifying as Latino may be of any race.
- Among Hispanic persons in 2020, most of Mexican descent (60%), with Central American heritage 11%, Puerto Rican 9%, South American 8%, Cuban 4%, Dominican 4%, Other 5%. Hispanic workers were mostly White (89%), with 5% Black and 1% Asian (USBLS, 2021c).
- 12.6% aged 16–24, 63.8% aged 25–54 (slightly more under 35), and 23.6% in age group 55 and older (about three-quarters under 65) in 2020 (USBLS, n.d.-b).
- Approximately 4% of the 2020 labor force persons with disabilities (USBLS, 2021a, Table A).

Labor Force Participation, Unemployment, and Educational Levels

Within each racio-ethnic group, the rate of LFP is the percentage of the labor force in that group that is working or looking for work. Differences across racio-ethnic groups occur for many reasons: geographic concentrations and access to employment, education levels, employment in different occupations and industries, socioeconomic and other factors. The highest levels of LFP in 2020 were for Native Hawaiʻian/Other Pacific Islanders (66.7%) with slightly lower rates for Hispanics (65.6%), People of Two or More Races (64.4%), Asians (62.7%), and Whites (61.8%). LFP for Blacks (60.5%) and American Indians/Alaska Natives (59.3%) was slightly lower (USBLS, 2021c).

Unemployment rates in 2020 also varied across the racio-ethnic groups. The DoL defines as *unemployed* those who were not employed during the week of data collection and have looked for work during the preceding month or were waiting to be recalled to a job from which they were laid off. Unemployment rates were highest for those identifying as Black (11.4%), American Indian/Alaska Native (11.7%), Two or More Races (11.6%), and Hispanic (10.4%) and slightly lower for Native Hawaiʻians/Other Pacific Islanders (8.9%), Asians (8.7%), and Whites (7.3%) (USBLS, 2021c). These rates were higher than in previous years due to effects of the COVID-19 pandemic, which took a higher toll on most ethnic minority individuals. However, relative placement of the groups was unchanged. Besides socioeconomic characteristics of various racio-ethnic groups, unemployment rates reflect the availability of different kinds of jobs in which these groups usually work. For example, the largest employment category for White and Asian workers (43% and 58%, respectively) was managerial and professional work, whereas Black and Hispanic workers were more evenly divided between sales and office, managerial, and service (including public sector) jobs. Black and Hispanic persons were also more likely than others to hold jobs in production and transportation.

Sex interacts with racio-ethnicity in employment patterns. For example, LFP and unemployment rates vary by sex within racio-ethnic groups (USBLS, 2021c). In 2020, for men aged 20 or older:

- LFP highest for Hispanics (79.1%), lower for Asians (74%), and Whites (70.3%).
- Lowest LFP shown by Black men (65.6%).

LFP was different among adult women:

- Highest LFP (60.7%) for Black women.
- Slightly lower LFP for Hispanic (58.8%), Asian (57.7%), and White (56.8%) women.

However, adult unemployment rates were:

- Highest for Black men (11.6%) and women (10.4%), and for Hispanic men (9.2%) and women (10.9%).
- Intermediate for Asian women (9.5%).
- Lowest for White men (6.7%) and women (7.3%) and Asian men (7.7%).

LFP for the sexes also varies with age. Overall, in 2020 for those over 16 years of age, the LFP for men was considerably higher (67.7%) than for women (56.2%). This percentage peaked around ages 25–54 for men (87.9%) and for women (75.1%; USBLS, 2021b, Table 3.3). Unemployment also varies by age. The highest unemployment rates during 2020 were for Black (24.1%) and Hispanic teenagers (21%). Rates were lower for White (16.6%) and lowest for Asian teenagers (14.9%; USBLS, 2021c).

LFP is considerably lower for those with a disability. For those with disabilities aged 16–64 in 2020, about 33.6% were employed or looking for work. The unemployment rate for those with disabilities was 13.4% in 2020, as compared to the rate of 7.9% for those without a disability, and was similar for women and men (USBLS, 2021a, Table A).

With respect to education, more than 90% of Black, White, and Asian workers over the age of 25 had completed at least high school in 2020. Only 79% of Hispanic workers had done so. Asian workers were most likely to have completed college; 67% had a bachelor's degree or higher. In contrast, 43% of White, 34% of Black, and 24% of Hispanic employees had attained a bachelor's degree or higher (USBLS, 2021c).

Labor Force Projections

Demographers and labor economists make projections of the future size and characteristics of the labor force as well as the population. Estimates are based on relative sizes and growth rates of demographic groups, LFP rates for various groups, sizes of age cohorts in these groups, and changes in jobs and the economy. Using CPS data and Census projections, the BLS estimates that by 2030, overall LFP will decline by 1.4%, with trends upward for age groups over 55 and downward for the prime-age population groups (partly due to college attendance). The 55–59 age group shows 2030 projected LFP of 74.9%, with younger workers' LFP projected at 81.4%. Projections are that between now and 2030, the LFP rate for women and men will become more similar, especially after prime child-bearing years. By 2030, men's LFP, which has been dropping, is expected to be 86.6%, and women's, which has been rising, to be 76.1% (Dubina et al., 2021).

Other Sources of Information

In addition to federal, state, and local governmental agencies, a wide variety of trade and professional organizations publish reports of interest to diversity professionals. Many nonprofits (e.g., Institute for Women's Policy Research, Pew Research Center) provide reports free of charge or for a nominal fee. Other organizations (e.g., Catalyst, Diversity Inc., or the Society

for Human Resource Management [SHRM]) may provide some materials to the general public but reserve other documents to member individuals or organizations. Diversity professionals will probably find it useful to join networks and organizations that provide information about populations of interest and about other organizations' management of DEI.

Data about Individual Organizations

The types of data discussed above are useful for understanding national and regional demographic patterns in the labor force. However, to manage DEI in their own organizations, diversity and HR professionals also need data on a smaller scale. In addition, often they are involved in preparing summaries of the employer's workforce overall or for parts of the organization. Diversity or HR professionals may have responsibility for preparing *EEO-1 reports* and AAPs, both of which use information on employee demographics. These documents can also be used as guides in developing programs for managing DEI.

An employer's EEO-1 report is an annual survey of the racio-ethnicity and sex of occupants of different job categories. It must be submitted by federal contractors with 50 or more employees and a federal contract of at least $50,000; and by companies with 100 or more employees who are covered by Title VII of the Civil Rights Act of 1964, whether or not they are federal contractors (US Equal Employment Opportunity Commission [US EEOC], n.d.). Information provided to the EEOC is used to evaluate compliance with Executive Order 11246 and Title VII (see Chapter 7) but, in most cases, is not publicly available. Instructions and sample forms are available electronically, and filing is completed online. The EEOC uses data from these reports to analyze patterns of employment by women and members of ethnic minority groups and for civil rights enforcement. The Office of Federal Contract Compliance (OFCCP) also selects organizations for compliance reviews based on information on EEO-1 forms.

The AAP is a plan describing an employer's AA program. ("AAP" sometimes also refers to the program itself.) The plan should be completed or updated annually by covered employers (generally those with a minimum of 50 employees and $50,000 federal contracts; over $50,000 under the Rehabilitation Act and over $150,000 under the Vietnam Era Veterans' Readjustment Assistance Act) or those who are subject to a court order as a result of discrimination litigation (HR Affiliates, n.d.; SHRM, 2018). The organization is not required to submit the AAP but should keep it on file to be produced in case of a compliance review or filing of a complaint of discrimination. The AAP includes data on the demographics of employees in various job categories and in the relevant workforce. By comparing current employees with the availability of qualified persons in specified categories, the employer identifies areas of underutilization and develops goals, timetables, and a narrative description of how any problems will be addressed through expanded outreach, targeted recruitment, training, or other activities.

Many organizations conduct internal surveys of their workforce to assess employee engagement, job satisfaction, ideas for improvement, or other responses that may be useful in managing the organization well. An employee survey that specifically focuses on experiences of inclusion, discrimination, or other topics related to diversity management is called a *culture audit* (see Chapter 14) and is often the first step in designing a program for managing DEI. Surveys can also be part of the needs assessment and evaluation of diversity training activities. Good survey design and administration requires knowledge and technical skill; diversity managers without a background in this area should rely on other qualified staff or work with a consulting firm or independent consultant. Important issues in conducting surveys relevant to DEI include sampling, confidentiality, appropriate question wording, and the format and disclosure of results.

Studying Organizational Diversity

This textbook frequently refers to research by social scientists or management researchers who have investigated questions of interest to diversity professionals. Empirical research is of two main types: experimental or correlational designs. Either may be conducted in the "lab" (an artificial environment) or the "field" (the real-world setting). After many studies have been completed on the same topic, *narrative* or *meta-analytic* reviews are conducted to draw overall conclusions that are considered more reliable than the results of any single study. No study is perfect, but the internal and external validity of a research design are helpful guidelines for evaluating its quality. A complete discussion of research design is beyond the scope of this text, but some definitions of key terms are presented in Box 2.1 as a refresher. For more detailed information, readers should consult a good textbook in social psychology, industrial-organizational psychology, or another social science field.

EVERYDAY CONCEPTIONS OF DIFFERENCE

To manage an ethnically diverse workforce successfully, one should have some knowledge of historical and cultural contexts of interaction involving members of different groups represented among employees and applicants. Later chapters provide contextual information about several important dimensions of diversity, but understanding of history is perhaps most important when considering present-day ideas about racio-ethnicity or religion. Therefore, this chapter concludes by illustrating how the history of intergroup relations is relevant for the management of DEI in today's work organizations. For more extensive historical background about major racio-ethnic groups in today's US workforce, see Takaki (1993), Tatum (1997), or Hays-Thomas (2015).

Social science offers general recommendations about managing inter-ethnic relations. However, in a particular employment setting, work relationships occur among specific racio-ethnic groups with particular *legacy* issues. These are biases, expectations, understandings, and behavior patterns resulting from the history of a relationship. *Macro-legacy* issues arise from the history of a relationship between racio-ethnic (or religious or political) groups, e.g., Israelis and Palestinians in the Middle East. In contrast, individuals also experience *micro-legacy* issues, which concern each person's unique history of intergroup relationships. Has the person experienced close and positive relationships, friendship, and trust with those of other racio-ethnicities? Exclusion and discrimination? Victimization by others' violent or criminal behavior? Perhaps no intercultural experiences at all? Many of us come to a diverse work environment without experiencing discussion of these issues comfortably across divides that separate people of different groups. For many current employees, the workplace is the most likely setting for social interactions with those of different backgrounds, and it may seem taboo to discuss inter-ethnic topics at work. Following growing public discourse about social justice issues, professional organizations (e.g., SHRM, the Society for Industrial and Organizational Psychology [SIOP]) have increased attention to these topics, and some have begun to recommend "safe" conversations about racial issues at work without concern for negative consequences such as discipline (e.g., Nagele-Piazza, 2020). Why is this topic relevant for those working in DEI?

First, co-workers with a strong racio-ethnic or other cultural identity see work interactions through the lens of historical and cultural issues relevant to their group. We can interact more effectively if we understand how others experience the world. Macro-legacy issues for American

BOX 2.1 KEY TERMS IN SOCIAL SCIENCE RESEARCH

- Empirical research: work that actually measures variables (as opposed to theoretical research developing conceptual frameworks to summarize and guide understanding).
- Experiment: research that alters or manipulates one or more variables, holds other variables constant, then measures the results. Because experiments attempt to rule out alternative explanations in this way, they are usually the most suitable method for drawing conclusions about *causes* of certain outcomes.
- Correlational research: study that measures two or more variables to find out the extent to which they are related. These designs are often used when it is difficult or impossible (e.g., for practical or ethical reasons) to manipulate proposed causal variables. Reliable correlations can be very useful in predicting what will happen later even if reasons for this relationship are unclear. Although most correlational designs cannot establish inferences about causality because of uncontrolled variables, some very sophisticated designs and analyses may be able to approximate the level of causal inference of an experiment.
- Internal validity: degree of confidence that study results actually show what the researcher concluded. Internal validity is high when competing explanations are ruled out by the selection of participants or by control (through design or statistical analysis) of other variables that might explain results. Generally, very simple studies have low internal validity, but those with high internal validity may seem artificial and unrealistic.
- External validity: degree to which results of a study can be generalized to other populations, environments, or ranges of the variables studied. Usually, studies with high external validity seem realistic, but this may come at the cost of uncontrolled variables. When external validity is low, the results are probably not generalizable. The external validity of a result can be established through a program of several well-controlled studies with different populations, environments, or different levels of variables. This is costly and time-consuming.
- Lab and field settings: *Laboratory* refers to an artificial environment in which aspects of the situation can be controlled. It may be an actual lab or a classroom or other setting to which participants come for research purposes. Generally, they are aware of participation in research and their informed consent is obtained. *Field* refers to the real-world environment in which the behavior in question naturally occurs. Studies in actual organizations are usually field research. Most commonly, experiments occur in lab settings, and field research is correlational. However, correlational studies are also conducted in lab settings, and experiments may be done in the field.
- Narrative review: compilation of several studies on the same general topic, in which the reviewer draws conclusions based on how well the studies seem to have been conducted and how strong their results seem to be. Conclusions about research are based on the reviewer's professional knowledge and expertise.
- Meta-analytic review: compilation of many studies on the same general topic, in which the reviewer categorizes studies on dimensions that seem important (e.g., design of study, characteristics of participants, lab or field setting, sex of researcher). Statistical analysis (not reviewer expertise alone) is used to determine overall results and whether the strength of conclusions varies with any of these classifications.
- Survey: When this term refers to a type of research, it generally means that a specified sample of people has been asked questions either by interviewers or by written or computer-presented questionnaires.

Black people include enslavement, Jim Crow laws, and segregation. Latino Americans may be concerned about the use of Spanish in the workplace, issues related to immigration, or the stereotype of "undocumented aliens." Asian Americans, even those who are US-born, may be treated and feel like *forever foreigners* because of their facial characteristics and may confront the *Model Minority* stereotype (see Chapter 10). White employees may be sensitive to long-standing prejudices about Southerners or Northerners rooted in Civil War history. For other examples of macro-legacy issues related to racio-ethnicity, see the shaded box.

WHY IT HELPS TO KNOW SOME HISTORY

What are some macro-legacy issues to consider in contemporary American workplaces? For American Black people, macro-legacy issues include the experience of enslavement (and destruction of culture and tribal/family ties); repressive Jim Crow laws, sharecropping, peonage, convict leasing, and biases in the criminal justice system; widespread segregation, residential red-lining, and denial of opportunity in employment, education, and federal programs; AA and systemic and interpersonal discrimination that affect present-day levels of education, income, and opportunity. Indigenous populations of Native Americans and Alaska Natives have been victims of genocide through war and illness; loss of land and subsistence way of life; repeated treaty violations; and destruction of culture through removal to reservations, forced removal of children, and bans on the use of native languages. For those of Asian American descent, legacy issues include the history of war and invasion involving Japan and China, Japan and Korea, Vietnam and China; varying legal restrictions over time on immigration to the United States; and the *Model Minority* myth. In addition, widespread religious, cultural, language, educational, physical appearance, and socioeconomic differences exist among Asian American groups. These include persons whose heritage includes the Far East (e.g., China, Japan, Korea), Southeast Asia (e.g., Vietnam, Cambodia, Thailand), the Pacific Islands (e.g., Samoa, Guam), South Asia (e.g., India, Pakistan, Nepal), West Asia (e.g., Iran, Afghanistan, Turkey), and the Middle East (e.g., Iraq, Jordan, Palestine).

Latinos or Hispanics are also very diverse and are formally considered an ethnic, not a racial group. Latinos include Mexican Americans (Chicanos), Puerto Ricans, Cubans, and persons from anywhere in Central or South America. Important legacy issues for these heritage groups include language, segregation and discrimination, forced relocations, erratic and inconsistent US immigration policies and enforcement, the assumption of so-called illegal alien status, and lingering effects of political disputes and military conflicts. Puerto Ricans are US citizens, Cuban immigrants have had privileged immigration status (as a result of Cuban Communism), and many Chicanos are descended from families that have lived in US territory longer than the families of most US White people. Each of these groups has its own issues, but the burdens of exclusion, poverty, and discrimination are a common theme.

For most Whites of European American heritage, legacy issues may seem less obvious, but in some areas with little outmigration, there may still be strong ethnic identifications, rural/urban differences, or prejudices based on regional origin (e.g., North vs. South). Some Whites have strong views about holding or rejecting a sense of collective responsibility for the legacy of slavery or of the destruction of Native American culture. Some ethnic legacy issues are related to religion, such as Jewish heritage. White people have been the most numerous and dominant group in the United States for so long that rising numbers of ethnic minority groups may present special challenges as more areas become "majority-minority." For example, Whites were fewer in number than all minority groups combined in more than 100 counties in the United States as of 2018 (Krogstad, 2019). The District of Columbia and four states were majority-minority, including Hawai'i, California, New Mexico, and Texas (USCB, 2012a), and the Census Bureau projects that the United States will become majority-minority in 2045 (Frey, 2018). For majority White persons, this presents a new reality.

Second, contemporary and historical conflicts between groups can affect relations among individuals. It is very easy to give offense without realizing it. For example, those whose families experienced "the Troubles" in Northern Ireland may be sensitive to issues of religion or Irish/British affiliation and discussion of the "Brexit" controversy (Beattie, 2013; Hammer, 2009); those of Taiwanese heritage may not appreciate being called "Chinese" (Tandon, 2021) or persons from Austria may take offense at being thought of as "German" because they sound "German" to North Americans. Appalachian natives and other Southerners may not think jokes about that US region are funny.

Third, rightly or wrongly, some ethnicities are seen as associated with particular religions. For example, persons from the Middle East may be Muslim but may also be Catholic, Jewish, or of other faiths. Those with limited knowledge may confuse nationality, ethnicity, and religious faith. Finally, it is wise to remember that some supposedly "typical American" things may only characterize one part of US culture. Not everyone recognizes Sunday as the day of worship, and people of color often face challenges unimaginable to their White co-workers. Readers of this text may have experienced fairly homogeneous environments in terms of school, residence, church, or social interactions. Social and work environments of the future will probably include a wider range of racio-ethnicities and other variations, and knowing something about the histories and cultures of other groups will be useful.

Racial Distinctions

The concept of "Whiteness" (see also Chapters 5 and 10) is a fairly recent invention, going back to the time of the establishment of the African slave trade in the 1700s (Omi & Winant, 2007; Painter, 2010). In Western history, many racio-ethnic groups have experienced enslavement and indentured servitude (a time-limited contractual arrangement in which the servant received passage, room, and board in exchange for several years' work). In fact, 300,000–400,000 White people, about one-half to two-thirds of the immigrants from Europe to the British colonies in the 1600s, were indentured servants (Painter, 2010).

The earliest Black Africans in North America came as indentured servants in the early 1600s (Painter, 2010; Public Broadcasting System, n.d.), but by mid-century, the demand for cheaper labor and the seemingly endless supply of those kidnapped from Africa led colonial landowners to enact slave laws pertaining to Africans. The idea of "Whiteness" apparently began in the late 1600s and 1700s as a way to explain and justify the enslavement of Black people, who became the basis for the colonial plantation economy and were categorized apart from European indentured servants. Then and in the 1800s, indigenous Indian populations were racialized to justify the appropriation of their land in the New World (University of Minnesota Sociology Department, 2019). To maintain order and prevent revolt in colonial society, landowners distinguished poor free persons of European descent from those forcibly brought enslaved to America (Buck, 2007). The original notion of Whiteness was associated with the promise of land at the end of the indenture period. However, over time the moneyed classes used status based on Whiteness as a "psychological wage" instead of higher wages or parcels of land. This hierarchal distinction from Black enslaved persons gave lower-class White people increased social status and privilege compared to those who were Black. By the late 1700s, these boundaries were firmly in place, embedded in an institutional system that enforced social and economic separation of "Whites" from everyone else and continues in some ways today.

CENSUS CATEGORIES AS A SNAPSHOT OF "RACE"

US Census categories over the years show the social distinctions that identified those who have been considered *not-White.* Each ten years, from 1790 to 1860, the Census distinguished between White and Black males and females, usually between Black persons who were free and those enslaved. From 1850 to 1880, categories included Mulatto (mixed Black and White), and in 1890 there were also categories for Quadroon (one-quarter Black) and Octoroon (one-eighth Black). Beginning in 1870, American Indians and Chinese were distinguished, and Japanese were added in 1890. The three enumerations in 1900, 1910, and 1920 simply asked for *color or race.* Beginning in 1930, complexity increased with the additions of Mexican, Filipino, Hindu, and Korean (as well as Indian tribes). A category for Hawai'ians was added in 1970. Ten years later, several other categories were listed (Vietnamese, Asian Indian, Guamanian, Samoan, Eskimo, and Aleut). *Spanish or Hispanic descent* was also included for the first time with listings of Mexican, Puerto Rican, Cuban, and Other. In 1990 there were ten options for those of Asian or Pacific Islander descent and several options for Spanish or Hispanic (Racebox, n.d.).

In 1819, Congress required shipmasters to provide lists of those immigrating. Millions immigrated each decade after that until immigration peaked between 1901 and 1910. About this time, the pattern of immigration shifted from predominantly Northern and Western Europe (e.g., Scandinavia, British Isles) to Southern and Eastern European countries (e.g., Italy, Poland). Restrictions on immigration increased, and each decade from 1911 to 1940 added 4–5 million immigrants. Since the 1960s, most immigrants have come from Latin America (about half) and Asia (about one-quarter) (Budiman et al., 2020; History.com Editors, 2021).

At times of increased US immigration, those who were poor, rural, or neither Protestant nor English speaking were perceived as non-White. This included immigrants from Eastern and Southern Europe (e.g., Poles, Greeks) and especially Jews (Brodkin, 2007; Painter, 2010). Impoverished and rural Irish immigrants escaping the potato famine in the 1840s were considered a different race and cartooned as animals (Knobel, 1986). Racialization was a justification for exploitative treatment of Native American tribes, drastic limits on immigration from Asia and much of Europe between 1924 and 1927, and deportation of *US citizens* of Mexican descent during the Great Depression (Digital History, 2012).

Whites, especially male landowners, based the new United States on their own social and cultural values. Many commonly accepted institutions and policies in this country were designed and operated to the benefit of the initial landed elite and others who, by "race," have come to be seen as part of the privileged White group. Many policies, described by Katznelson (2005) as "Affirmative Action for Whites," operated to their benefit and were critical in development of the middle class. These included laws and administrative decisions that deliberately and systematically excluded Black workers from benefits of union legislation, regulation of working hours, minimum wage, Social Security, support for veterans and the poor, and post-World War II programs such as educational benefits of the GI Bill and VA home loans. These exclusionary policies amplified the consequences of legal segregation. Key to understanding contemporary race relations is the recognition that Whites' socioeconomic status has risen significantly due to public policies *designed to their benefit* over other racial groups, especially those who were Black. As time passes, these policies, political decisions,

and institutions are forgotten or become accepted as normal without acknowledgment of the degree to which they have benefited Whites over others.

Although seldom openly discussed, these events are remembered by many of today's workers or their parents and form the context for their understanding of treatment at work. Today people of color are generally underrepresented in high-level positions and desirable occupations and overrepresented in departments and positions with low pay and authority, in part because of historical policies of exclusion. This may go largely unrecognized by the majority employees. Work settings are often culturally "White," and many people of color are skilled at bicultural *shifting* or alternation of behavior and attitudes from work to social or family environments (Jones & Shorter-Gooden, 2003).

Someone of minority status (e.g., racio-ethnicity, gender, religion) who inquires or complains about potentially discriminatory situations risks being seen as overreactive or trouble-making. However, ignoring the situation allows it to continue unexamined, unexplained, and uncorrected. An easier course in such cases is to withdraw partially or completely by leaving the organization. Managers and employees who recognize these special stresses affecting those of minority status will be better prepared to mitigate their effects.

This chapter has reviewed intuitive and scholarly conceptualizations of diversity and their implications, as well as major types of surface- and deep-level diversity and methods of measuring them. Because of the emphasis on racio-ethnic diversity in today's workforce, historical background and legacy issues of several groups were also briefly reviewed. Next, we turn to psychological processes affecting relationships in contemporary US organizations.

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