Bernardo M. Ferdman, EDITOR
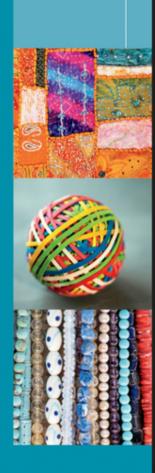
Barbara R. Deane, ASSOCIATE EDITOR

Diversity at Work: The Practice of Inclusion

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Bernardo M. Ferdman, *Editor*

Barbara R. Deane, *Associate Editor*

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Foreword

From our perspective, diversity and inclusion (D&I) represent some of the core values of the fields of I-O psychology and organization development (OD). As a result, as scientist-practitioners we have a dual responsibility both to dimensionalize and research these constructs to continue to build our understanding of them, and to assist others in driving these values deep into the business and people strategies of the organizations in which we work and consult. Given the ubiquity of the war for talent, with its increasing emphasis on shifting demographics and generational differences in the workplace and on concepts such as global thinking, learning agility, and cultural dexterity, it is no wonder that D&I have become the epicenter of the talent management agenda of many prominent and forward-thinking organizations today.

That said, if D&I are indeed at the center of talent management and at the forefront of many corporate sustainability efforts, where then are the explicit linkages to the fields of I-O, OD, and human resource management (HRM)? This was the question we asked ourselves several years ago during one of our annual Professional Practice Series Editorial Board planning meetings at the annual conference of the Society for Industrial and Organizational Psychology (SIOP). After years of having experienced D&I efforts at PepsiCo as being at the core of our HR agenda, we wondered why they were not more fully integrated with the fields of I-O, OD, and HR in general. As we discussed with Bernardo Ferdman (who was one of our board members at the time), there was little in the literature directly linking the different fields of practice, aside from some key early efforts such as the original volume by Susan Jackson and Associates in the early 1990s, even though many of the philosophical underpinnings and workplace practices of D&I overlap and have a shared heritage with I-O and OD efforts. Despite some more recent targeted efforts in the field

to create these connections (for example, see recent focal articles in the *Industrial-Organizational Psychologist: Perspectives on Science and Practice*), there remains no single definitive source that effectively integrates D&I efforts with the fields of I-O, OD, and HRM. That is, until now.

This volume you hold in your hands, *Diversity at Work: The Practice of Inclusion*, represents a needed comprehensive and holistic approach to bridging the gap in the literature between these different but related fields. Bernardo Ferdman and his coeditor, Barbara Deane, have moved the needle forward with this addition to the Professional Practice Series by incorporating perspectives from both academics and practitioners across multiple disciplines to focus not just on the concepts of D&I (recognizing both old and new dimensions), but also on the actual application or practice of inclusion in the workplace. In many ways it represents the next step in the combined evolution of D&I and I-O.

Starting with the introduction of new frameworks for conceptualizing inclusion (that is, going beyond diversity alone, which is a notion that some organizations continue to struggle with), we are then presented with a range of different individual and organizational perspectives or lenses on the practice of inclusion as integrated specifically with key areas of I-O as well as other related disciplines in psychology and business. Some of the topics here focus on inclusion as applied to personal identity, communication, leadership, organizational culture, human resource management, organization development, work group climate, and corporate strategy. The volume then includes a discussion of some important aspects of practice in the world of D&I, such as benchmarking D&I efforts across different organizations, future trends in the field, and insightful case studies from a variety of chief diversity officers and practitioners.

As with any effort of this magnitude, it is important to recognize all the work that has gone into the development and execution of this edition. A heartfelt thank-you to Bernardo and Barbara for delivering an excellent volume in the series. Thanks also to our editorial team (Dave W. Bracken, Michael M. Harris, Allen I. Kraut, Jennifer Martineau, Steven G. Rogelberg, John C. Scott, Carol W. Timmreck, and of course Bernardo M. Ferdman) for their original feedback on Bernardo's proposal. Thanks as well to

our successor, Allen Kraut, and his editorial team (Seymour Adler, Neil R. Anderson, Neal M. Ashkanasy, C. Harry Hui, Elizabeth B. Kolmstetter, Kyle Lundby, William H. Macey, Lise M. Saari, Handan Sinangil, Nancy T. Tippins, and Michael A. West) for keeping the momentum going during their tenure with the series. Finally, thanks to Matt Davis at Jossey-Bass for helping keep the process on track, as always.

D&I is a critically important topic to organizations in general and a core value of I-O and OD in particular. In our opinion, it has not yet been given the full attention or level of integration it deserves in the I-O arena. This important volume serves to close that gap. Although it has been some years in the making, the topic is as significant and timely as it ever was, and we are very pleased to see it finally completed. We enjoyed working with Bernardo in the early formation of the book concept and outline and watching it continue to develop all the way through the various phases of the effort. In many ways it is ironic that this volume represents our last as Professional Practice Series Editors and Allen Kraut's final volume, as we all feel like we have been actively involved, invested, and engaged in the outcome. And isn't that what being inclusive is all about? Enjoy!

September 2013   ALLAN H. CHURCH
JANINE WACLAWSKI
Original series editors for this volume

Preface

Diversity at Work: The Practice of Inclusion

Bernardo M. Ferdman and Barbara R. Deane

Much has been said and written—especially in recent years—about diversity at work. The idea that people vary on a range of identity and cultural dimensions and that this diversity matters for organizations and society is now widely accepted and discussed, not only in industrial-organizational (I-O) psychology, in human resources, in management, and in related fields, but also in the world at large.

We have learned a great deal about the role of diversity in organizations and about the interactions in the workplace among individuals and groups with different social identities and backgrounds; increasing scholarly and practical effort has been applied to describing the dynamics of these relationships and to documenting ways to manage them productively. In part, this is because intergroup relations often can be problematic; indeed, much diversity scholarship and practice has focused on the problems associated with diversity and on ways to avoid or surmount them. This has been important and generative work. In today's and tomorrow's societies and workplaces, it is imperative to reduce and prevent invidious bias and discrimination, to eliminate negative conflicts, to avoid waste, to increase fairness, and to take better advantage of all possible resources, in ways that ideally result in creativity, innovation, and better outcomes for more people, for their organizations, and for society as a whole.

Yet, working with and managing diversity in ways that are productive, healthy, growthful, and empowering—for both

individuals and organizations—often remains an elusive goal. How can groups and organizations best use and benefit from the diversity that is inevitably present in and around them? What can individuals, leaders, and organizations do to work with diversity not simply as a reality that must be addressed, but rather as an opportunity and a gift? How might diversity truly be put to work on our individual and collective behalf? What can individuals, leaders, and organizations do to make this happen?

In this book, we present a fresh perspective and approach to understand and benefit from diversity. We focus on *inclusion*—and specifically *the practice of inclusion*—as a fundamental approach for benefitting from diversity, in a way that works for everyone, across multiple dimensions of difference. Inclusion involves creating, fostering, and sustaining practices and conditions that encourage and allow each of us to be fully ourselves—with our differences from and similarities to those around us—as we work together. To be inclusive, these practices and conditions should also permit and elicit everyone's full contributions to the collective (Ferdman, 2010; Ferdman & Sagiv, 2012), in a virtuous cycle that is beneficial both for individuals and the larger groups and/or organizations to which they belong (as well for their various social identity groups). The *practice of inclusion* is what individuals, leaders, and organizations do to bring this experience and process to life. Essentially, our claim, as documented and supported throughout this book, is that the practice of inclusion permits applying the collective wisdom regarding diversity—developed through theory, research, application, and experience—and does so in a way that focuses on recognizing and realizing the positive contributions of diversity. Rather than assuming diversity is a problem to be solved, practitioners of inclusion assume that it is a rich resource to be tapped and enjoyed.

This view is in evidence today to some degree—as seen, for example, in the typical pairing of the terms *diversity* and *inclusion*, as in Chief Diversity and Inclusion Officer, or Office of Diversity and Inclusion. But it is a perspective that evolved over time, as the field developed, and it is in many ways still in its infancy. In 1992, SIOP published *Diversity in the Workplace: Human Resources Initiatives*, by Susan Jackson and Associates, as the second volume of its then newly launched Professional Practice Series, in which this

current volume now takes its place. Jackson's book exemplified the goal of the series, which is to provide practitioners in organizations—particularly I-O psychologists, HR professionals, managers, executives, and others who address human behavior at work—with resources, insights, information, and guidance on how to address key organizational issues by applying the best of what organizational psychology has to offer. *Diversity in the Workplace* combined the voices of scholars and practitioners to document effective ways to conceptualize and address the challenges of diversity. Along with other work emerging at the time (for example, Cox, 1993; Cross, Katz, Miller, & Seashore, 1994; Ferdman, 1992, 1994; Fernandez, 1991; Jamieson & O'Mara, 1991; Loden & Rosener, 1991; Morrison, 1992; Thiederman, 1990; Thomas, 1990; Thompson & DiTomaso, 1998; Triandis, Kurowski, & Gelfand, 1994) produced by both academics and practitioners, Jackson's book provided some theory and structure, grounded in psychology and related fields, for the emerging field of diversity in organizations. From an initial focus on addressing historical inequities, targeting oppression, and bringing the promise of civil rights to the workplace—with a primary emphasis on gender, race, ethnicity, and sometimes cultural and national origin, and combined with the goal of preparing for demographic shifts in the workforce and increasing globalization—the field developed to incorporate attention to reaping the potential business benefits of diversity of various types, both visible and invisible, including sexual orientation, ability status, age, social class, religion, life experience, and a myriad of other dimensions.

More than twenty years after Jackson's (1992) book, knowledge about both the role and dynamics of diversity in organizations and the practice of diversity management has dramatically developed and expanded. Many of the challenges posed by Jackson and her collaborators remain, but they are no longer seen as unusual or new—they have become part of the "normal" work of organizations. For example, recruitment, retention, and assessment that account for diversity are now focal topics in I-O psychology and human resource management, thanks in part to the efforts of pioneers such as Jackson and the contributors to her volume. At the same time, attention to diversity has become a global phenomenon, and the dimensions of diversity that matter

have expanded and become more complex and nuanced. With globalization, new forms of exchange and collaboration have proliferated across cultural boundaries of all sorts. I-O psychologists and diversity practitioners are often asked to help global organizations navigate, in both broad and systematic ways, through the tensions associated with difference. Beyond addressing these tensions, professionals find themselves supporting organizations in a time of shrinking resources and great competition and must seek proactive ways to ensure that all people's contributions can be used effectively and wisely for the benefit of the organization and its many stakeholders.

Given these trends, and in line with work grounded in what has become known as positive organizational scholarship and with new insights on multiple identities and their intersections across a range of dimensions of diversity, the concept and practice of inclusion provide a frame to permit addressing the dynamics of diversity in more complex, expansive, and productive ways. Through an inclusion lens, we can continue to incorporate our prior insights regarding diversity and also highlight the practices needed so that individuals, groups, and organizations can truly benefit from that diversity. Through an inclusion lens, we can attend to the complexity of individual experience and identity, without losing sight of intergroup relations, intercultural dynamics, and systemic processes and structures.

Today, then, the cutting edge of diversity practice for organizations addresses the challenge of inclusion—the degree to which organizations and their members are able to fully connect with, engage, and utilize people across all types of differences. Diversity can provide advantages only when it is combined with fundamental changes in individual behaviors and attitudes, group norms and approaches, and organizational policies, procedures, and practices that result in people feeling appreciated, valued, safe, respected, listened to, and engaged—both as individuals and as members of multiple social identity groups. This is the work of inclusion, which is both theoretically and practically different from diversity. Inclusion is a key driver and basis for reaping diversity's potential benefits.

Nevertheless, theory and practice have not kept pace with the needs of organizations to attend to diversity and its implications,

particularly in regard to inclusion, in spite of the growing use of the term. I-O psychologists, human resource professionals, managers and executives, and related practitioners need clearer guidance regarding best practices for inclusion. This book provides practitioners with an understanding of and a way to navigate the new challenges posed by the need for inclusion amidst diversity, a challenge that has yet to be taken up in a systematic way by the bulk of I-O psychologists, or with any consensual definition or approach by the bulk of practitioners. The book's key premise is that inclusion is a core element for leveraging the advantages of diversity at the individual, interpersonal, group, organizational, and societal levels. To elaborate on this premise, we provide a state-of-the-art perspective on inclusion and its practice: what it is and how it is manifested in individual and collective behavior and in organizational practices (Chapter 1), how it can be created and fostered (Chapters 2 through 13), how it can be applied in a variety of settings (Chapters 14 through 19), and what this means for the future of the field (Chapters 20 through 23).

This volume is unique for practitioners because it provides an applied focus while emphasizing the lens and grounding provided by research and theory in industrial and organizational psychology and related fields. It contains a reliable compendium of information and experiences on the practice of inclusion from topic experts, including internal and external change agents and academics. By including and combining the perspectives of both scholars and practitioners, the book not only provides a bridge between I-O psychology and related fields to the practice of inclusion in organizations but also exposes both sets of professionals to each other's thinking and work. In putting this volume together, we sought to exemplify the value and practice of inclusion, in particular by incorporating a range and variety of voices, approaches, and styles. The thirty-four authors of the book's twenty-three chapters represent not only I/O psychology but also other areas of psychology as well as various other fields, including management, leadership, intercultural communication, social work, and public policy. The authors live, work, or have extensive experience in over ten countries and span a range of identities on various dimensions.

Our illumination of inclusion is consistent with the growing emphasis on positive organizational scholarship and practice.

A focus on eliminating invidious forms of discrimination, while important, is insufficient. There is growing recognition by scholars and practitioners that great benefits can be derived for organizations and their members by focusing on excellence, strengths, and vitality. Attending to and practicing inclusion permits organizations and their members to proactively replace discrimination with a much more positive and productive approach that can serve to release potential and result in more optimal outcomes for all.

Audience

This book is intended for a broad range of readers. Seasoned practitioners seeking a textured and well-founded compendium of cutting-edge approaches grounded in theory, research, and experience, as well as novices seeking to understand what diversity and inclusion at work are all about, together with everyone in between, will find a great deal of relevant and useful knowledge in these pages. For example, professionals (whether internal or external to an organization) who must plan, design, and/or implement an inclusion initiative or who want to learn more about such initiatives will find this book indispensable. Additionally, this book will be useful to managers and executives as they work to define and carry out strategic initiatives related to diversity and inclusion.

Thus industrial-organizational and consulting psychologists, HR professionals, organization development (OD) practitioners, management consultants, training professionals, and diversity and inclusion leaders, practitioners, and consultants will all benefit from the range of material presented in the book's chapters. Organizational leaders and practitioners, whether specializing in diversity and inclusion or not, will be able to find a great deal of useful information and applicable suggestions. Finally, instructors and graduate students in I-O and consulting psychology, HR, OD, organizational behavior, management, business administration, public administration, and social work are also an intended audience for the book, which can be used as a text for courses focused on diversity or as a supplementary text for courses on organizational behavior, organization development, human resource management, and related courses.

Overview of the Book

This volume addresses the key issues in framing, designing, and implementing inclusion initiatives in organizations and in developing individual and collective competencies for inclusion, with the goal of fully benefiting from diversity. The chapters are grouped into five major parts, covering foundational frameworks, individual and interpersonal perspectives and practices, organizational and societal perspectives and practices, applications, and integrative reflections and commentaries.

Part One, "Frameworks for Understanding Inclusion," introduces the concept of inclusion and effective ways to communicate about it in organizations. In Chapter 1, Bernardo Ferdman tackles defining inclusion and explains how it connects to diversity, yet differs from it; he also develops a multilevel systemic framework for inclusion that links the psychological experience of inclusion to interpersonal, group, organizational, and societal practices, norms, and values. In Chapter 2, Robert Hayles provides another essential framework: how to communicate about diversity and inclusion so that a broad audience sees their benefits, using a developmental model that encourages a strategic and tailored approach to communicating about inclusion.

Part Two, "Individual and Interpersonal Perspectives and Practices," addresses the work that individuals, including leaders, must do to foster inclusion for themselves and others. In Chapter 3, Bernardo Ferdman and Laura Morgan Roberts explore how individuals can include themselves, especially their multiple identities, and how they can bring more of their whole selves to work. In Chapter 4, Ilene Wasserman moves into the interpersonal realm and argues that effective and inclusive communication involves a relational responsibility to create shared meaning. She explores new competencies and processes to minimize destructive conflict and to leverage diversity so that it is mutually beneficial. In Chapter 5, Janet Bennett continues in the interpersonal realm with the concept of intercultural competence. Pointing to cognitive, affective, and behavioral skills and characteristics, Bennett contends that this competence not only supports effective interaction in a variety of cultural contexts but also can be developed to enhance inclusion. Her chapter exposes readers to the field of

intercultural communication, a body of knowledge and practice quite relevant to diversity and inclusion. In the final chapter of Part Two, Chapter 6, Plácida Gallegos calls for a new type of leadership—inclusive leadership—which she describes as a relational approach that fosters authentic relationships and models courage and humility. This chapter serves as a bridge to Part Three, because inclusive leadership is a key component for translating inclusion across levels of analysis.

The seven chapters of Part Three, "Organizational and Societal Perspectives and Practices," explore a range of approaches that organizations can use to practice inclusion systematically and systemically. In Chapter 7, Mary-Frances Winters introduces a model (the *inclusion equation*) that depicts four interrelated variables for creating and sustaining inclusive organizational cultures. In Chapter 8, Lynn Offermann and Tessa Basford address inclusive HR management and show how successful organizations advance inclusion in a variety of ways, in the process changing how they manage and develop their people. In Chapter 9, a team of authors from PepsiCo—Allan Church, Christopher Rotolo, Amanda Shull, and Michael Tuller—delve into inclusive organization development by focusing on four OD processes: organizational and employee surveys, 360-degree feedback, performance management, and talent management. Each process is explored with extensive examples of how it was addressed at PepsiCo. In Chapter 10, Lize Booysen describes how to develop leaders to foster inclusive behavior and practice, and she explains how leadership development can be done more inclusively. In Chapter 11, Lisa Nishii, from an academic background, and Robert Rich, from a practitioner background, share their conceptualization of inclusive climates and provide details on how to design change efforts to foster such inclusive work climates. In Chapter 12, Karsten Jonsen and Mustafa Özbilgin describe various models for global diversity management based on evidence from a number of field studies of practitioners. The final chapter in Part Three, Chapter 13, by Michàlle Mor Barak and Preeya Daya, examines how, using what the authors call *corporate inclusion strategies,* organizations can and should go well beyond corporate social responsibility to extend inclusion to their surrounding communities and societies.

Part Four, "Key Application Issues and Domains," incorporates six chapters; each addresses the practice of inclusion in a particular context or provides a key application tool or perspective. In Chapter 14, Julie O'Mara describes a very useful framework and tool she co-developed, the Global Diversity and Inclusion Benchmarks, which organizations can use to determine the level of inclusive best practices they are using. In Chapter 15, Effenus Henderson, chief diversity officer at Weyerhaeuser, explains the details of his company's multiyear strategy to build a more diverse and inclusive culture, as well as its inclusive leadership training program. In Chapter 16, Kumea Shorter-Gooden, now chief diversity officer at the University of Maryland, addresses the goals and key components necessary to create diverse and inclusive higher educational settings, and shares examples from her experience in her previous role as the chief diversity officer of Alliant International University. In Chapter 17, Carolyn Lukensmeyer, Margaret Yao, and Theo Brown describe how America*Speaks,* a leading organization in the deliberative democracy movement, practices inclusion in all aspects of its efforts to engage diverse citizens in dialogue and decision-making about complex issues that affect them at local, state, and national levels. Alan Richter, in Chapter 18, examines how a global organization, UNAIDS, has worked to build a culture of inclusion in its workplace and in the societies where they operate. Finally, in Chapter 19, Charmine Härtel, Dennis Appo, and Bill Hart, authors representing diverse experiences, share a case study of how Rio Tinto pioneered a new organizational approach to include aboriginal contractors, both socially and economically, in the Pilbara region of Australia.

In Part Five, "Moving Forward," the book concludes with four chapters that provide overall reflections on the practice of inclusion, each from a different perspective. In Chapters 20, 21, and 22, key thought leaders—Michael Wheeler, a well-regarded corporate diversity officer and practitioner; Angelo DeNisi, a prominent I-O psychologist; and Stella Nkomo, a noted diversity scholar—reflect on the value of the book, the field as a whole, and the challenges they see for practitioners going forward. Finally, in Chapter 23, we share our comments about the book's themes and our experience in editing it, implications for the practice of inclusion, and thoughts about the future of the field.

Acknowledgments

A book such as this reflects the efforts and contributions of many people. Indeed, a key tenet of inclusion is that we cannot accomplish great work alone, and this book is no exception. In particular, we would like to thank the contributors to the volume, who not only shared their ideas and expertise but were also willing to go above and beyond to be responsive to our many editorial demands. We very much appreciate the contributions of Jennifer Habig, who initially was to be a partner in this project and was instrumental in helping to formulate the initial book proposal and outline, before she had to take a different path for her career and education. Sergio Valenzuela-Ibarra, Liz Barat, Maggie Sass, and Sarah Maxwell provided Bernardo with helpful and productive research assistance for the project at various stages. Allan Church and Janine Waclawski, our Professional Practice Series editors, provided ongoing encouragement and insights and have been kind and responsive, for which we are grateful; we also appreciate the input on the original proposal provided by the rest of Allan and Janine's editorial board. We owe much appreciation to the subsequent series editor, Allen Kraut, who took a special interest in this volume and inspired (as well as cajoled, prodded, and encouraged) us to keep it moving and get it done. The rest of Allen's editorial board—Seymour Adler, Neil R. Anderson, Neal M. Ashkanasy, C. Harry Hui, Elizabeth B. Kolmstetter, Kyle Lundby, William H. Macey, Lise M. Saari, Handan Sinangil, Nancy T. Tippins, and Michael A. West—provided useful input on an updated proposal and outline for the book. Matt Davis, the acquisitions editor at Wiley, was both patient and insistent at the right times; Ryan Noll, his editorial assistant, made sure that we got all the final pieces right; and Kristi Hein, our copy editor, carefully and brilliantly made sure to catch and help us address errors, ambiguities, and inconsistencies both large and small. The members of the Diversity Collegium, some represented among the chapter authors and others not, have been consistently supportive, cheering us forward and providing input, ideas, and connections whenever requested. Our greatest debt and gratitude is reserved for our life partners and for our children (and Barbara's grandchildren),

who provided both support and distraction, and primarily meaning; they encouraged us to stick with it when we thought we couldn't and pulled us away when we couldn't stop, and they made sure that each of our lives is full of all that makes inclusion worthwhile in the first place.

March 2013   BERNARDO M. FERDMAN
                                                  San Diego, California
                                                  BARBARA R. DEANE
                                                  Seattle, Washington

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