Beyond Diversity Management:
A Pluralist Matrix for Increasing Meaningful Workplace Inclusion

by

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A thesis submitted in partial fulfillment of the requirements for the degree of

MASTER OF ARTS
in
PROFESSIONAL COMMUNICATION

We accept the thesis as conforming to the required standard

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Abstract

Despite rapidly burgeoning diversity in the Canadian workforce, and demonstrable gains to be made as a result of increasing inclusion, organizations still struggle to create meaningfully inclusive workplaces. The traditional diversity management model has largely failed to fix this longstanding problem. A variety of research has identified successful strategies for increasing inclusion across disciplines such as social psychology, critical management studies, systems theory, and universal design. However, these overlapping strategies, as well as the commonalities of underlying structure, go unseen due to ideological and disciplinary siloing. Working from a foundation of theoretical pluralism, I present two linked ideas in this paper. First, I propose and justify a shift in language from the counter-productive diversity management towards meaningful inclusion. Second, using multi-disciplinary research I identify successful, broadly-applicable strategies for enhancing meaningful inclusion in the workplace, and describe an inclusion matrix of best practices that creates a practical road map organizations can use to enhance meaningful inclusion.

Keywords: Complexity theory; diversity and meaningful inclusion; non-profit organizations; theoretical pluralism; learning organizations; Canadian studies
Acknowledgements

Royal Roads University’s work in re-imagining graduate-level education gave me the opportunity to find this within myself. Particular thanks to the library staff, without whose efforts this would be a much less useful document. The Students’ Association of Mount Royal University is a workplace that has stretched and changed me, and allowed me to do the same in return. I am grateful.

My father was my first teacher; he taught me passion for learning, and the knowledge that one can teach oneself anything by picking up a book. My mother taught me a lesson of equal importance: that feelings matter as much as facts, and form the foundation for everything we are.

My deep thanks to Virginia McKendry for demonstrating so clearly the grace spot linking academics and heart that I struggled to reach throughout this process; David Black for a life-changing theory class, and for cultivating my ability to write poststructuralist screeds; Gilbert Wilkes IV for hard-won skills in information curation and social media that stood me in good stead; and thesis committee member and colleague Patricia Pardo for ongoing inspiration. Special thanks to my advisor Jennifer Walinga, whose insightful and pragmatic supervision saved my sanity several times.

Liz, who always believed I had this in me; who held up the structure of our lives and her own career while I pursued a dream; who understood the point better than I did many times. None of this would have happened without you. I think I probably owe you dinner.

And my daughter Rica, who balances more intersectionality than I ever had to manage; who dreams of running the world and making it more beautiful; who describes my job as teaching people to be good to each other. I do that work, and this work, for you.
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Beyond Diversity Management:

A Pluralist Matrix for Increasing Meaningful Workplace Inclusion

Despite rapidly burgeoning diversity in the Canadian workforce, and demonstrable gains to be made as a result of increasing inclusion, organizations still struggle to create meaningfully inclusive workplaces (Hiranandani, 2012). This is a longstanding problem that the traditional diversity management model has largely failed to fix (Lorbiecki, 2002; Miller & Rowney, 1999). A variety of research has identified successful strategies for increasing inclusion across a variety of fields such as social psychology, critical management studies, systems management, and universal design. However, these overlapping strategies, as well as the commonalities of underlying structure, can go unseen due to ideological and disciplinary siloing. Working from a foundation of theoretical pluralism, I present two linked ideas in this paper. First, I propose and justify a shift in language away from the counter-productive diversity management, towards meaningful inclusion. Second, using complexity theory, critical theory, organizational systems theory, and universal design principles, I identify successful, broadly-applicable strategies for enhancing meaningful inclusion in the workplace and describe an inclusion matrix of best practices that creates a practical road map organizations can use to enhance meaningful inclusion.

A critical micro-history of the Canadian workplace

North American workplaces have historically been “designed by and primarily for a working population that was white, Christian, able-bodied, male, and supported by a full time unpaid domestic worker—the ‘housewife’” with other/ed workers forced to fit themselves into that framework (Agócs & Burr, 1996, p. 31). This assumption has been embedded into organizational theory and practice
regarding diversity in the North American workplace, creating “sticky floors” and “glass ceilings” for people from a variety of other/ed identity groups (Hiranandani, 2012, p. 4). As this study will be adding to the comparatively small body of Canadian-focused organizational research, and as workplace diversity scholarship has largely been developed in and focused on the United States, clarification of the Canadian context is in order. Historically, Canada has had a much smaller proportion of visible minorities than the United States, a relatively large proportion of Francophone citizens, and a mosaic-based vision of multiculturalism articulated in the 1988 Canadian Multiculturalism Act (Miller & Rowney, 1999). The 1986 Employment Equity Act designated four disadvantaged groups—women, Aboriginal peoples, people with disabilities, and members of visible minorities (Miller & Rowney, 1999)—and focused on removing structural barriers in organizational policies, practices, and cultures (Agócs & Burr, 1996).

With the impetus of employment equity under the umbrella of multiculturalism, provincial governments developed diversity and diversity management initiatives—for example, Alberta’s Multicultural Commission began holding symposia on diversity management in 1989 “to enhance public knowledge of diversity issues” (Miller & Rowney, 1999, p. 309). The concept of diversity in this era was expanded significantly from the four disadvantaged groups to include a much broader definition of marginalized difference, including factors such as sexual and gender identity, and religious background (Agócs & Burr, 1996; Hiranandani, 2012; Lorbiecki, 2001; Miller & Rowney, 1999). This has become one of the challenges surrounding the concept of diversity, particularly as it relates to the workplace: Who does the term refer to? Does it include
everybody including White ¹ people? Everybody except White people? Does it include women but not men? Does it include Muslims and atheists but not Christians? And at what point do diversity management strategies focus on the needs of a specific population versus a broad, catch-all approach? Gutman (1994) neatly summarized the challenge in this way: “what counts as equal rights for women or for ethnic and cultural minorities cannot even be understood adequately until members of these groups ‘articulate … what is relevant to equal or unequal treatment in typical cases’” (p. ix). If this is so—and I emphatically believe it is—then how do organizations proceed with the work of diversity management, having usually neither time nor resources to participate in such in-depth community discussions? And, how do organizations maintain principles of equity and fairness even as Canada’s demographics continue to change?

Since its inception, diversity management (DM) focused organizational efforts to recruit, retain, and facilitate working relationships among individuals from a variety of backgrounds (Turnbull, Greenwood, Tworoger & Golden, 2010). However, DM concentrated on changing individual attitudes and behaviour, and did not generally seek to effect change at the level of organizational cultures, structures, or processes (Agócs & Burr, 1996). DM also subtly shifted organizational attention away from systemic inequities, and towards diversity and diverse people as an issue requiring management (Agócs & Burr, 1996). If diversity is understood as the quality of being different (Agócs & Burr, 1996), then the unspoken question is “different from whom?” DM implicitly assumed the norm to be a White, straight, able-bodied male employee or manager, with diversity referring to problematic “others” whose presence and difference require

¹ Because Whiteness “is a social and historical construction … a theoretical/metaphorical construction” rather than an objective, uncontested descriptor, capitalizing Whiteness denaturalizes it in a way that is consistent with a questioning of the concept of diversity (Bevir, 2010, p. 1422).
special understanding and response (Agócs & Burr, 1996, p. 39), while leaving unaddressed the continuing structural and procedural inequities generally at play in Canadian organizations (Hiranandani, 2012). This assumption forms the purpose of diversity training, for example, which aims to help participants feel more comfortable with “difference” and better able to deal with “different” people (Agócs & Burr, 1996, p. 39; Turnbull, Greenwood, Tworoger & Golden, 2010). By focusing overwhelmingly on individual attitudes and experiences, DM restructured the concept of diversity away from disadvantaged groups to one of difference divorced from any understanding of power (Agócs & Burr, 1996; Lorbiecki, 2001).

From diversity management to meaningful inclusion: Shift the language, shift the onus

Rodriguez stated that “defining diversity in terms of race, ethnicity, and sexual orientation constitutes a deficient model of diversity. Absent from this multicultural model is the diversity, complexity, and tension within these supposedly stable groups” (2010, p. 24). While the concept of diversity is troubling in this inexactness, as well as its implications of divergence from norms, it is still important for its recognition and naming of the many facets of Canada’s heterogeneity. DM, on the other hand, creates significant barriers to authentic acceptance and participation of diverse members of the workforce (Hiranandani, 2012, p. 2). In addition, DM fails to address both the element of systemic power in organizations, and the limitations imposed by a strategy that addresses elements of diversity on a case-by-case basis.

For these reasons, I propose a conceptual shift to meaningful inclusion. This term stems from social inclusion theory, which is based on a social construction model of disability and, in a larger view, marginalization in general (Caidi & Allard, 2005). The social construction model defines disability and the subsequent marginalization that occurs as “a product of social
interaction, thought, belief, and language used in a certain culture” rather than an objective, individual lack, and proposes that since disability is rooted in social interactions, so also is the possibility of emancipation from disability (Saito, 2006, p. 463). This gave rise to the concept of universal design, defined as “design of products and environments usable by all people to the greatest extent possible, without the need for adaptation or specialized design” (Saito, 2006, p. 463). Universal design, therefore, suggests an approach of lowering environmental barriers to participation rather than creating specialized strategies for coping with difference; this has also been taken up extensively in the educational community as a learning design principle. This is a powerful perceptual shift that disconnects the undercurrent of onus given to “diverse” people for being so troubling to the status quo, and refocuses attention on organizational structures and systems. Rather than sitting at a “normal” centre, looking out at diverse groups and individuals and struggling to include them on a case-by-case basis, meaningful inclusion refocuses organizations on their own structures, searching for environmental barriers and strategizing how to lower or dismantle them. Diversity continues to be an important concept. Acknowledging the variety of identity groups in the workplace and recognizing both the experiences of inclusion or exclusion that they experience and the value they can bring to an organization as a result of their identity can provide an organization with great opportunity (Hiranandani, 2012; Roberson, 2006). However, in a societal context of high and increasing heterogeneity in the available workforce, organizations needs to focus attention on creating structure that will remove barriers to entry and full participation. This point of view is reflected in the principles of universal design: if an environment is designed with all possible users in mind, full inclusion and participation become inevitable (Saito, 2006).
Meaningful inclusion and complexity theory

“In the new systems thinking, the metaphor of knowledge as a building is being replaced by that of the network. As we perceive reality as a network of relationships, our descriptions, too, form an interconnected network of concepts and models in which there are no foundations” (Mella, 2012, p. 1).

Complexity theory, sometimes called systems theory, ushered in a crucial shift in the understanding of organizations. Meaningful inclusion can be effectively understood through complexity theory’s description of organizations as complex adaptive systems instead of stable, instrumentally controllable quantities (Axelrod & Cohen, 2000; McMillan, 2006). Complexity theory proposes that complex adaptive systems—in this situation, organizations—require newness and difference as generative properties to thrive and survive. This chaotic openness to difference can be described through the concepts of semi-permeable barriers and social capital (Axelrod & Cohen, 2000, p. 68-72). Successful complex adaptive systems maintain semi-permeable barriers, allowing the flow of chaotically diverse elements into and throughout the system (Axelrod & Cohen, 2000). Semi-permeability allows change and growth while flexibly maintaining the necessary structures and patterns of the system (Axelrod & Cohen, 2000; McMillan, 2006). The necessary structures and patterns of the system are maintained, not by any will of leadership, but by the trust-based relationships between agents in the organization. This trust built between individuals and groups is called social capital (Axelrod & Cohen, 2000). The social networks become a self-limiting counterpoint to semi-permeability, creating the fluid state of balance between stability and diffusion known in complexity theory as the edge of chaos (Axelrod & Cohen, 2000; McMillan, 2006). I define a permeable organization as one that
maintains semi-permeable barriers with a high level of internal social capital. Permeability is both enhanced and stabilized by trust, while offering the diffusion necessary for successfully adaptive organizations to thrive and grow (Axelrod & Cohen, 2000, p. 68-72).

Complexity theory’s concept of dynamic and fluid complex adaptive systems is open to an approach that seeks to denaturalize the idea of the static, instrumental reality of organizations. However, complexity theory as it is applied to human systems—particularly organizational theory—has been accused of some blind spots. The first is a research tendency to naturalization of the concept of complex adaptive systems. This naturalization suggests that in order to work with or understand a complex adaptive system, the system’s “natural” processes cannot be interfered with (Goldspink & Kay, 2010). The implicit logical extension here is that human complex adaptive systems are automatically diverse and inclusive and should not be meddled with to increase inclusion; since there is a great deal of research proving that this is not true either of organizations or societies, it is a misleading assumption, to say the least. This leads us to the second major blind spot: complexity theory, based in mathematics and bio-sciences as it is, does not take into account human power structures and human reflexivity (Goldspink & Kay, 2010). This is not to suggest that a complexity theory model falls apart when these factors are introduced—it is merely to note that they do need to be introduced for a complexity theory model of human organizations to be meaningful rather than a pseudo-scientific metaphor that continues to feed into management theory’s historical power-blindness.

Complexity, Inclusion, and Theoretical Pluralism

There are many disciplines that accept or espouse elements of complexity theory in their view of human systems. For the sake of brevity, I focused on the examples of systems theory,
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social psychology, education, and critical organizational theory. As examples of thought that can create influence on diversity and inclusion within organizations, these ideological neighbourhoods tend, by and large, to communicate frustratingly little (Clegg, Courpasson, & Phillips, 2006, p. 237). Yet in order to create more broadly applicable strategies for meaningful inclusion, both theory and practice around diversity and inclusion must somehow speak to all these participants, and engage them on an epistemological level. Thus, a key role of theoretical and methodological pluralism in this project was to create an epistemological framework that could itself be meaningfully inclusive for a variety of theorists and practitioners.

As I discussed earlier, systems theory tends to view organizations as learning and evolving systems created between participating agents without a component of power or marginalization (Mella, 2012; Senge, 2010). This overlaps with a mainstream organizational management perspective that focuses on adopting systems theory for the sake of efficiency, rather than for the sake of organizational wellbeing or a sense of inclusion among employees. Shockley-Zalabak and Morreale restated the principles of complexity theory from this perspective by saying that “when we can’t trust … problems are not solved, opportunities are missed, costs rise, and effectiveness suffers. Conversely, creativity, innovation, and ambiguity offer major organizational opportunities” (Shockley-Zalabak & Morreale, 2011, p. 39). Complexity theory creates a solid link between critical and mainstream organizational studies.

Meanwhile, social psychology research is interested in the concepts of fairness, social cohesion and social trust, and intergroup contact. Theorists have examined at length questions of discrimination between groups; inequities and lack of fairness enacted in groups, organizations, and societies; and the roots of belonging and exclusion in in-groups and out-groups. While the
concepts of social cohesion and social trust are analogous with social capital, these studies tend to employ a constructivist lens, focusing on the realities created by interactions between individuals and groups. Demonstrating the impact of complexity theory in descriptions of group interactions, Phan described social trust as “particularly important in the context of uncertainty where information is inadequate and risks of cooperation are potentially high, such as in rapidly changing societies with high immigration” (2008, p. 25). A constructivist lens is also brought to bear heavily in the study of education, where inclusion, group dynamics, and trust are also considered of paramount importance in enhancing inclusion and participation both in learning and in the creation of knowledge (Kincheloe & Berry, 2004). This lens, while it is not often brought to bear in an organizational setting, has much of value to share regarding the topics of fairness and group dynamics; again, the principles of complexity theory form the theoretical link between disciplines.

Critical theory, because of its ideological insistence on power systems and human emancipation as central foci of research, takes an implicit standpoint with regard to the theory and practice of diversity and inclusion in organizations—namely, that it should be done because it is the right thing to do (Hiranandani, 2012, p. 2; Prasad & Prasad, 2002). The feminist branch of critical management theory has long been engaged in the project of examining and denaturalizing the power-infused relationships between individuals and groups (Clegg, Courpasson, & Phillips, 2005). Standpoint theory originally worked to recognize the voice of women relative to patriarchal culture in all its iterations, and was later broadened to include standpoints of a variety of marginalized groups including those marginalized on the basis of race, ethnicity, and sexual orientation (Bullis & Stout, 2000; Cadue, 2005; Lorbiecki, 2001).
Postcolonial and anti-racism theorists and practitioners have also created a wide body of work exploring the value and validity of voices that are often unheard or undervalued in North American organizational settings (Hiranandani, 2012; Prasad & Prasad, 2002). Recognizing marginalized individuals as a rich source of newness and difference within institutions has been a decades-long project for critical theory, and therefore meshes well with the project of complexity theory (Goldspink & Kay, 2010). Many branches of critical theory provided powerful learning that has seeped unacknowledged into other disciplines. Standpoint theory spoke of multiple valid viewpoints and realities; feminism and anti-racism allies recommended opening power structures to engage employees more authentically; all of these components underpin a great deal of the organizational flexibility, responsiveness, and creativity extolled by systems and learning organization theorists today. Critical theory’s focus on these strategies from an ideological standpoint predates complexity theory by decades, but complexity theory validates these findings through an independent, non-ideological lens, opening fresh opportunities for connection between critical and mainstream organizational study.

Social inclusion theory, while firmly rooted in critical theory, seems to stand somewhat apart from the large body of critical diversity research that is intently focused on recognition and inclusion of various identity groups. While focused mainly on the identity markers of disability and poverty, social inclusion theory reverses the lens from examination of diverse groups and refocuses on deconstructing and dismantling exclusionary structures and environmental elements that hamper access and inclusion for marginalized groups (Caidi & Allard, 2005). One of the most powerful models to come out of social inclusion theory is Universal Design. Universal Design began as an architectural principle that re-imagined disability as a quality housed in the
environment rather than the individual, and imagined environments that were constructed for universal access. Universal Design has since been adapted to the educational field as Universal Design for Learning (UDL).

Much of the core theory regarding meaningful inclusion in the workplace stems from critical theory, across a variety of disciplinary boundaries including feminism, postcolonialism, anti-racism and social justice, queer theory, intersectional theory, and social inclusion. In order to employ a stance that spans these boundaries respectfully, I have employed Fournier and Grey’s three-part definition of critical management studies: an anti-performative stance, or the epistemological de-privileging of efficiency as a measure of value or usefulness; a commitment to some form of denaturalization; and a reflexive approach to methodology (Clegg, Courpasson, & Phillips, 2000, p. 281). Although an anti-performative stance may seem likely to alienate mainstream organizational management practitioners, a focus on alternate measures of value or usefulness speaks to the multiple-bottom-line approach that underpins corporate social responsibility (Reynolds, 2008, p. 384). The wide swathe of literature on systems theory and thinking (Mella, 2012), and learning organizations (Senge, 2006) have surprisingly deep connections with a critical management studies approach.

In this study, complexity theory provided the foundation that allows for a layering of critical and constructivist lenses, and grounded theory’s inherently pluralist process of drawing from and knitting together a heterogeneous array of scholarly literature echoed that layering, in order to build a theory of meaningful inclusion that resonates for practitioners from a variety of perspectives (Reynolds, 2008, p. 384). This structure reconfigures the circular ideological debate in diversity management circles regarding what diversity really means, who it includes, what
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constitutes the value of diversity for and within organizations, and how to create structures that deliver fairness and equity for all participants.

As a person of intersectional identity, intersectionality underpins my approach to research, work, and indeed daily life (Crenshaw, 1991). Although the concept is imbued with a critical stance, for me it also describes a daily state of being which involves constant bridging of perspectives, ways of being, and kinds of knowledge; even though this multiplicity may hold inherent contradictions and tensions, I nevertheless house and embody all of them (Crenshaw, 1991; Styre & Eriksson-Zetterquist, 2008). As Midgley notes, “seeing through multiple theoretical lenses grants action research greater flexibility than adherence to a single theoretical perspective. When multiple theories are used as a resource for the comparison of different ways of seeing the phenomenon of concern, critique is enhanced” (2011, p. 2). I believe that the key to unlocking deep understanding of diversity and inclusion lies in this intersectional openness and ability to bridge vast and sometimes contradictory difference. It is therefore not only of paramount importance to me in this research to assume a pluralist stance—it is unavoidable.

Methods

I employed grounded theory methodology to explore full-time staff perceptions of permeability and meaningful inclusion in the SAMRU, a membership-based non-profit organization serving the credit students of Mount Royal University. Grounded theory is a qualitative, inductive, and holistic methodology that seeks to create robust theory using ethnomethodological data-gathering approaches together with coded textual analysis and recursive literature review (Charmaz, 2006; Stern & Porr, 2011). Because grounded theory uses a non-linear matrix process, it fits well as a methodology for a complexity-based study.
Grounded theory research has wide acceptance in the healthcare field, although it is almost non-existent in the study of organizations. Nevertheless, as a qualitative methodology initially developed in the late 1960s, I believe the principles of GT have had significant impact on the development of qualitative research, particularly in terms of its combination of ethnomethodological observation processes (characterized by thick description and immersive researcher connection with the site of research), broad multi-disciplinary literature review, and non-linear, inductive, matrix-based analytical process. These key elements can describe many kinds of qualitative methodology, and research that resembles GT is sometimes called mixed-methods.

**Mitigating power, designing for inclusion**

Although I am adopting a theoretically and methodologically pluralist approach within this project, I have derived some central principles from the critical perspective. This is action research that aims to create the potential for emancipatory change; namely a best-practices path toward increasing meaningful inclusion in Canadian workplaces. I have assumed a workplace environment charged with some levels of power imbalance that reflects similar power imbalances within the surrounding society. I paid attention to elements of organizations that the literature suggests are the most common hiding places of entrenched power (ie. hierarchical structure, hiring processes, organizational culture), but I have considered these historical dicta open to testing and deconstruction.

In addition, I acknowledge that I currently hold a position of significant power, which biases my understanding of how power and inclusion currently operate within the organization. I have been a staff person within the SAMRU for nine years, and was an active student member
and volunteer for four years, approximately a decade earlier. I have held three different positions (Coordinator, Manager, Director) within the Student Services department since becoming staff. I was promoted to Director of Student Services from the position of Manager of Volunteer Centres in January 2013—directly before the beginning of data collection, but well into the project development process. My job gives me unfettered access to staff, and data collection included three participants from within my area of responsibility. I am also responsible for anti-oppression training for volunteers and optionally for staff, which means that diversity and inclusion is recognizable as an area of personal and professional concern for me. Grounded theory tends not to consider researcher positionality to be a conflict; as an organizational participant, my input is also valuable within the context of this study, and my professional knowledge about diversity and anti-oppression work helped me to create insightful theory. However, my position of power clearly necessitated stringent mitigation processes. With the cooperation of the Executive Director, I used feminist-derived research principles to include as broad a range of perspectives as possible, as well as to mitigate my influence, including:

Minimizing my power over participants as researcher:

a. The initial call for participants was sent out through the acting SAMRU Researcher, with no indication of who the primary researcher would be, and therefore no coercion to participate (staff are accustomed to receive both calls for participants as well as results of research from the Researcher, with no organizational expectation around participation or response);

b. With the cooperation of the SAMRU Executive Director, participants were allowed to participate in interviews during work hours at their convenience;
c. I acknowledged myself as primary researcher before interviews began, and named my power as researcher and within the SAMRU;
d. I provided written reassurance of confidentiality, and written commitment not to reveal any information shared within the research process; and
e. I used research assistants to conduct all initial interviews.

Maximizing participants’ control over input processes:

a. Participants were provided the interview guide at least a week before interviews occurred;
b. During interviews, participants were encouraged to talk freely and go “off script” to talk about what mattered to them, regardless of whether it related to questions asked; and
c. Transcripts were shared afterwards, with participants encouraged to make any additions or changes they felt would more accurately represent their opinions and experiences.

Contested terms

I have attempted to note in detail where participant experience echoes or differs from the literature in terms of the connection between power and access/inclusion. I strove to use consistent language throughout the data collection process, utilizing the words ‘meaningful inclusion’, and ‘permeability’ throughout. This means that the data is at once a test of the meaningful inclusion processes within the SAMRU, and also a test of the ability of the new language to accurately represent the concepts being referenced. I also used the word access as a supplemental term in both its noun and verb forms. As both noun and verb, access denotes the ability to enter a place, to get information, to gain the opportunity to meet certain people, and the opportunity or right to experience or make use of something. The term access therefore has many
of the concepts connected to meaningful inclusion embedded in its meaning, and was extremely useful for illuminating the discussion of meaningful inclusion. Other contested terms within this study include the previously operationalized permeability and meaningful inclusion, as well as complexity and staff. Complexity is used variously in organizational literature, sometimes with a chaos theory-based definition, but quite often with more colloquial connotations of intricacy, complication, or density. In this study, the term is grounded in complexity theory. Staff includes all hierarchical levels from entry level and part-time to full-time and senior level. This is consistent with the policies of the SAMRU, which do not create linguistic separations between “staff” and “management”.

**Description of participant sample**

Nine full-time staff were interviewed for this study, including myself. This represents just above one quarter of the full-time staff group. The call for participants was sent to part-time staff, but none responded. Five of the participants are directors; three were promoted from mid-level manager positions during the month preceding data collection, including myself. The remaining four participants are coordinator or entry level full-time staff. Five participants identified as women, and four as men; two men identified as gender-fluid to some degree, and none identified as transgender or otherwise gender-diverse. Three participants identified as gay or lesbian. Three participants identified as visible minorities, and one identified as being of Aboriginal descent. None identified as having a disability. None identified as working in a non-primary language.
Data collection and analysis

I first created a call for participants, a research consent form, and an interview guide which consisted of 10 open-ended suggested questions and probes. The invitation to participate in this research project was circulated to staff by the official SAMRU Researcher who is outside my department and at arms-length from me, minimizing my ability to cross the line between my roles as senior staff and researcher in terms of influencing participation. The invitation to participate was circulated to all thirty-three full-time staff with the request that they share it as well with their part-time staff. The call for participation did not indicate whether the research was being conducted by an internal or external party, and did not name me as the primary researcher. Interested participants contacted the SAMRU Researcher, who then forwarded their statement of interest to me. I contacted the eight potential participants to share the research consent form and a copy of the interview guide, as well as to let them know that I would not be conducting the interviews myself. Since different people may require different levels of preparation in order to participate fully in any input process, interviews were scheduled over the course of the month of March. I constructed a Doodle poll which allowed participants to choose the day and time of their interview.

Once all interviews were booked and consent forms signed and returned to me, I identified and booked four research assistants: Jennifer Caswell, Matthew Kinzel, Shelly Makrugin, and Elizabeth Schweizer. Ms. Caswell and Ms. Makrugin each conducted three interviews, and Mr. Kinzel conducted two interviews. Staff were allowed to participate during work hours. Each initial interview lasted between a half hour and an hour. All interviews were recorded directly onto my personal laptop computer using recording software Audacity, and
subsequently transcribed by me into Word documents. I had Ms. Schweizer (my wife) interview me using the interview guide and record my responses to my laptop computer in order to ensure that my input took a similar form to that of the other participants. Once transcribed, I e-mailed a copy of each transcript to the appropriate participant, requesting that they review the transcript to ensure that it was accurate both in terms of what they remembered saying in the interview, and in terms of what they wished to say. Participants retained full ability to modify these transcripts in any way they wished, and all participants were encouraged to send follow-up notes or phone calls to share additional ideas they may have had in relation to the research topic. In the case of three of the participants, I contacted each of them directly with specific follow-up questions, fleshing out details of their initial transcripts. In all three cases, I e-mailed copies of questions that I felt had not been fully addressed, and offered the opportunity to address them if so desired, either through follow-up interview or with written responses. Two responded by e-mail, and one requested a follow-up interview. I assigned all participants non-gender-specific pseudonyms to maintain their anonymity, and I have been careful to ensure that all stories shared from these transcripts do not identify them by exposing details of their jobs or places within the organization.

All of these procedures were designed to enhance participants’ power and agency over the process as well as their shared information and knowledge, to ensure and underline my arms-length approach to the material, and to minimize my potential influence over their responses. At no point did I engage directly with any participants about the initial interview process, although all follow-up was conducted by me directly. Once I had received finalized and accurate transcripts, I prepared all transcripts as line-separated documents, and imported this raw data into
an Excel spreadsheet. All subsequent coding and analysis was done within Excel or creating handwritten mind-maps and matrices.

Coding of data was performed using techniques described by Charmaz (2006, p. 42-71) and Miles and Huberman (1994, chapter 9), with particular attention to the development of matrices. Initial coding involved sorting all line-separated text, searching for common patterns and themes. I initially developed 28 separate categories that represented traits or indicators of meaningful inclusion: gradually, through repeated sorting and clarification of category names, the initial 28 were pared down to nine broad categories that were identified as elements of the workplace environment that impacted meaningful inclusion. Two of the nine eventually emerged as SAMRU-specific subcategories of other categories. The categories were organized in order of importance based on the number of mentions they received in the text of both the participants’ transcripts.

Once I completed this initial identification of the primary participant-identified elements affecting meaningful inclusion, I organized the categories according to various identity factors including seniority/relationship to hierarchy, length of time as staff, ethnicity and/or cultural identity, sexual orientation, gender identity, and age, to illuminate if and how identity and positionality affected experiences of inclusion and access.

Meanwhile, ongoing literature review provided an outline of historically-noted structures that have been successful in enhancing diversity and inclusion in a variety of disciplines, and from various paradigmatic perspectives. This literature search included use of the official documents of the SAMRU, such as policy and procedure documents, the strategic plan, and the bylaws. I used memoing and rewriting of various elements of the report to record my thoughts,
observations, curiosities, and hunches during the collection, coding, and analysis processes. The coding process occurred recursively and simultaneously with researcher memoing, an evolving literature review, and report writing.

The literature review helped to clarify the multi-disciplinary applicability of the initial findings, as well as the nature and utility of theoretical and methodological pluralism.

**Results: The Inclusion Matrix**

Inclusion Matrix, Fig. 1
The Inclusion Matrix (Figure 1) is a structure of interwoven principles and categories that provide conceptually linked strategies for dismantling organizational barriers to newness. Without singling out specific aspects of difference, without targeting diverse people as problems to be solved, an inclusion approach can provide insights into creating employee opportunities, sense of belonging, and citizenship in the workplace. Additionally, this model removes the need for those in positions of centrality within organizations to dictate the terms of inclusion. As I experienced with the participants in the SAMRU study, what constitutes meaningful inclusion varies from individual to individual; within the Inclusion Matrix model, this is no longer the problem that it was with a diversity management model. As is true for people with a diversity of experiences, values, desires, and goals, one strategy for increasing inclusion cannot possibly anticipate the needs for inclusion of all workplace participants. This is a critical illumination of why diversity management strategies fail repeatedly: strategies aimed at the individual can never go far enough to encompass the needs of an entire workforce (Lorbiecki, 2001).

The first questions asked of participants was “what does meaningful inclusion in the workplace mean to you?” and “what has meaningful inclusion meant for you personally at SAMRU?” This question tested the language of inclusion. I was looking for consistency of broad concepts, and the ability for that consistency to nevertheless include nuance of personal experience and identity for each participant.

Participants’ responses displayed these traits, and also demonstrated an important principle: what constitutes meaningful inclusion is different from person to person. However, there are three common principles of inclusion that derive from these statements.
Three principles of inclusion

One is the aspect of personal opportunity: the ability to access promotions, to be involved in decisions that impact one, to grow and develop, and to be seen and understood within the work environment.

“Meaningful inclusion means, I guess, feeling that everyone belongs, that there’s no barriers to movement, promotions, that sort of thing.” Branwen

“[It means] having opportunities to impact the work that is done and the decisions being made. Not being rejected based on background, work experience, age or departmental divisions. It means that from starting in a small corner of the organization I have been able to branch out and involve myself in many other facets of the SA. My career has changed many times but my employer has remained the same.” Cailin

“It means that people who work here have an opportunity to participate in decision-making … not always directly making the decisions, but having input and being part of the conversation, participating in decisions that are made that impact them.” Kaamil

A second common aspect of inclusion is the aspect of social belonging: the ability to be fully oneself, and to feel accepted and safe both formally and informally in the work environment.

“I guess it means … to feel comfortable to be who I am to the fullest extent I want to share, or not share, with people in my workplace, and not feel judged or like there might be potential consequences to divulging information about myself. That I’m able to be comfortable sharing [all aspects of my life] with my colleagues at any sort of level in the organization.” Cameron
I get the sense that everybody’s door is open, and I find it quite open … everybody’s very welcoming, approachable, and warm; it’s not judgmental, I don’t feel judged.” Oryn

“For me, meaningful inclusion in the workplace means that I don’t have any social pressures to hide who I am. That there is a statement of inclusion that clearly defines inclusion, and that my workplace is a safe and celebratory environment for diversity.” Kai

The third is the aspect of organizational citizenship: a state of empowered connection and engagement, the ability to contribute to the workplace, to make decisions that impact the organization, and to bring one’s abilities fully to bear in the service of work that one values and of the growth and improvement of one’s workplace.

“It means also being able to make decisions, and feel empowered to do that, so if I see something that needs to be changed that I can … find a way of making that happen, or talk with others to see if it’s something that needs to happen.” Tadewi

“I think there’s a deeper kind of level to inclusion that is about not just having my presence accepted, but having the ideas and the perspective that come with that presence taken into the organization.” Tayo

Seeing some of your, not necessarily all of your, but some of your ideas implemented, realized. Being able to see yourself in the space that you’re occupying. [It means] room for me, job opportunities, ideas, opportunities to help the organization grow, develop, be better.” Navya

[It means] opportunity to participate in something that connects deeply with my own personal values.” Kaamil
These three overarching principles of inclusion, and the seven more specific categories within them, form the Inclusion Matrix. I have also drawn connections between the Inclusion Matrix model and the systems theory or learning organizations model throughout this section.

**Seven Categories of Inclusion**

A meaningfully inclusive organization can be created through identifying and dismantling barriers to inclusion across the seven elements of inclusion within the overarching principles of personal opportunity, social belonging, and organizational citizenship.

**Personal Opportunity**
- a. Structural principles
- b. Hierarchy

**Social Belonging**
- c. Intent and Culture
- d. Formal inclusion
- e. Social/informal inclusion

**Organizational Citizenship**
- f. Perceived ability to impact the organization
- g. Openness to change

Another way of viewing inclusiveness across the seven categories is to examine it through the lens of the five characteristics or principles of a learning organization (Senge, 2006, p. 6-10). Leadership views the organization as a dynamic, complex system rather than a static structure that requires gatekeeping. Staff are encouraged and empowered to pursue personal mastery not only over their own work, but towards understanding and improving the system.
Leadership develops clear mental models, and shares these appropriately with staff to enhance creativity and teamwork. Leadership not only freely shares the vision for the organization, it shares the ability to build the vision. And finally, the organization is focused on a model of team learning, or “thinking together”. Importantly, although “thinking together” across difference may present challenges, adopting an attitude of working through discomfort develops staff skills and aptitudes at meaningful social and informal inclusion, guided by formal structures and the modeling behaviour and mentorship of organizational leaders.

Learning organizations are not synonymous with meaningfully inclusive organizations, but learning organizations have taken a critical step in the direction of being meaningfully inclusive: they embrace a complexity or systems model of thinking about the organization, and employ strategies to infuse that perspective throughout the organization.

The Inclusion Matrix at the SAMRU

Staff members within the SAMRU feel a high level of identification with the organization and its culture, mission, and values. They experience high perceived levels of individual choice and autonomy, as well as high perceived ability to participate in and impact the organization. Although participants were not always able to name why or how the environment was inclusive, or even if its inclusiveness was deliberate or accidental, it was clear that they perceived a high level of inclusiveness. The demographics of the SAMRU full-time staff also demonstrated a high level of inclusion and permeability, with significant diversity at all levels of the organization.

To create a sense of the importance placed by participants on the various categories, I have provided the number of times each category was mentioned by a participant. Each category
was mentioned multiple times by most participants, and in three places there were sub-categories specific to the SAMRU workplace.

Personal Opportunity

a. Structural principles: 507 mentions

b. Hierarchy: 189 mentions

Social Belonging

c. Intent and Culture: 446 mentions

   Organizational attitude to membership as an indicator of inclusion: 178 mentions

d. Formal inclusion: 387 mentions

   Personal impact of difference on inclusion: 199 mentions

e. Social/informal inclusion: 157 mentions

Organizational Citizenship

f. Perceived ability to impact the organization: 410 mentions

   Variety/dispersion of identities throughout the organization: 134 mentions

g. Openness to change: 291 mentions

These seven categories are distributed in relation to the three main principles, and display significant overlap and interaction. Structural principles (a) may be connected to the principle of social belonging as well as the principle of personal opportunity. Perceived ability to impact the organization (f) may be linked to personal opportunity as well as organizational citizenship. Intent and culture (c) may be linked to all three principles. These categories must be understood not in a sense of linear and discrete connection, but as an environmental matrix, interlinked at many points within the structure.
To illustrate the link between social belonging and organizational citizenship, for example: an employee who does not feel safe being “out” at work is less likely to feel a high sense of attachment and alignment with the organization. Without the high alignment that comes from social belonging, staff will be less invested in improving the organization for its own sake. Social belonging and organizational citizenship are also strongly linked to personal opportunity. Acts of organizational citizenship may lead to opportunities for advancement, for example, so employees that lack access to venues of formal inclusion like mentorship and input structures may be less likely to make the kind of outstanding contributions that lead to advancement. Lack of personal opportunity is unlikely to inspire staff to acts of organizational citizenship.

I further subdivided each category into positive/negative, inclusive/exclusive, or successful/unsuccessful in order to clarify how participants gauged SAMRU’s performance in each of these categories. For example, the category of Intent and Culture is subdivided into “authentic organizational intent/consistent organizational culture” (392 mentions) and “inauthentic organizational intent/ inconsistent organizational culture” (54 mentions). These results and their implications will be further analyzed in the recommendations for SAMRU. Below, I describe in detail the seven categories of inclusion, provide examples from SAMRU participants, and suggest examples of strategies to enhance inclusion within each category.

**Personal Opportunity**

**A. Structural principles**

Organizational structural principles are the articulated principles developed within an organization with regard to recruitment and hiring guidelines or policies; human resource management; pay structures and raises; job classification systems; formal input/feedback loops;
and organizational planning, and particularly strategic planning. This category speaks to whether such principles exist, and the extent to which they are clearly articulated and understood by all.

“Having the mission and vision is really nice, it’s nice to see that. I’ve worked in places where they’re not really concerned so much about that, they’re not being so upfront about saying this is what we’re striving for.” Branwen

“I think that many people buy in to the way that we often make decisions, like the strategic planning process and the planning retreat process, so that although they may not have control over every decision, they have control over enough decisions, and they understand the boundaries well enough to be able to know what is their role and what is other people’s roles, so that they can see themselves in their work, and they can see their own contribution.” Navya

Summary of strategies to strengthen organizational structural principles:

1. Clearly stated organizational direction regarding inclusion in foundational documents (strategic plan, mission, vision, values)
2. Salary benchmarking that minimizes identity-based differentiation
3. Job classification system that minimizes identity-based differentiation
4. Hiring policies and procedures (use of committees, adherence to clearly-defined hiring objectives and language, appropriate training of hiring committees)

Organizational structures that were mentioned repeatedly by a variety of participants included the mission, vision, and strategic plan; salary benchmarking; and a job classification systems that standardized the understanding of the kinds of work that are done across the organization, as well as de-gendered traditionally ‘men’s and women’s work’. Both of these
latter elements are considered crucial for opening organizations to marginalized groups (Bullis & Stout, 2000; Cadue, 2005). Interestingly, the combination of benchmarking and job classification ensures that groups that traditionally earn less in the workplace for the same work approach closer to pay parity; additionally, because men’s salaries are slightly depressed in scale, the system ensures that men who work in the SAMRU are generally aligned with this implicit value of equity and fairness, by virtue of the fact that they continue to choose to work there. Some participants thought that the SAMRU’s non-profit status is a sort of values code that diverse individuals might gravitate towards as a workplace.

“We are a non-profit organization that focuses on human services that happen to be labelled student services. And many human service orgs have sort of a people orientation ... I think for these reasons, the core of our business is open to many different kinds of people.” Nayva

Another kind of structure that was mentioned repeatedly by most participants was meeting and planning structure. A great deal of thought goes into how the SAMRU engages in planning and decision-making, with staff input given high priority.

“We did a big strategic planning exercise last in 2010, and that doesn’t seem that long ago, but we’ve got a lot of new people since then that who have yet to participate in that process. All of the full time staff at the time that were here did participate in that process, and were able to, you know, experience the articulation of organizational values and giving their input to what should be, but people that have been hired since then haven’t been through that. I think part of that is through the hiring process, we have a number of,
I guess, safeguards in place to ensure that the way we operate is fair to people. And hopefully that translates.” Kaamil

“Open Space Technology is based on the principle that everyone can bring ideas to the planning retreat for instance, about anything in the organization. ... if I’ve had an idea, I can put that on the table and say, I want to talk about this, and anybody else who’s interested in talking about that can show up at the meeting. And all of the ideas are ... not in any way ranked or accepted or dismissed on the basis of your expertise on paper to be talking about those things. That ... has really seeped in as a way of operating for the whole organization, so that even though it was introduced for planning retreats, I think the organization does that in smaller ways throughout the year.” Tayo

Some of the structural principles provide value through supporting and encouraging life priorities outside the workplace. Flexible time management options such as flex time, family illness time, days off for adoption processes, as well as generous sick days, vacation time, and short- and long-term disability coverage, all encourage employees who value work-life balance.

“Most of the people who work here also try to buy in ... to that balance between giving good value to the SA while also protecting their own private time, personal time, work-life balance thing.” Navya

There is some controversy around the concept of hiring for organizational fit as described or implied by a few participants, as fit is often used as an exclusionary tactic during hiring processes. In all cases here, however, the concept is underpinned by clear organizational structural principles and intentional culture based on inclusion and permeability:
“Checking … [for organizational fit] … allows us to see whether or not they generally consider that people matter, that mentorship is important, that they need to cut people some slack, and recognition that there are a variety of ways of doing things, and so on. All the mindsets you’d expect from someone who’s open to diversity.” Navya

Participants gave 474 positive and 33 negative mentions of structural principles at the SAMRU.

B. Hierarchy

Hierarchy is embedded in the organizational management concept of leadership, and is one of the most historically controversial organizational elements when considering increasing meaningful inclusion. Feminist organizational theory originally denounced hierarchy as antithetical to inclusion and equity, and championed collectives as the equitable choice of organizational structure. However, many pro-feminist, anti-racist aligned organizations, and organizations that utilized elements of feminist theory in organizational structures even without that alignment, engaged in modified hierarchy-collective hybrids. “Combinations and divergent forms of the original bureaucratic ideals exist that incorporate both bureaucratic stances by having the staff structures, but also contain elements of collectives by encouraging employee empowerment and participation as well” (Cadue, 2005, p. 43).

Examples of these hybrid structures include participatory bureaucracies, feminist bureaucracies, and collective democracies (Cadue, 2005, p. 43). SAMRU is an example of a participatory bureaucracy, where rules are fairly formalized, and rewards distributed based on position, but staff have various avenues open to them “to participate in the critical decisions” (Cadue, 2005, p. 43). Participatory bureaucracies and other hierarchy-collective hybrids are quite common; many qualities of these hybrids are also found in learning organizations (Senge,
In this way, while hierarchy can create barriers to inclusion, it can also create structural pathways necessary to inclusion.

“I think that the inclusion of different types of people is high and is happening, but I think that maybe the organizational structure is kind of hierarchical which is kind of ... in opposition to this idea that we are not just accepting but embracing of these things, and part of me thinks that those two things don’t always go together, and making more grassroots decision-making would be beneficial without having to go through the hierarchy all the time every time.” Tadewi

“A lot of my role is helping people to see parts of the picture that they can’t necessarily see, and I think that plays a role in how they feel connected. So whether or not they feel something’s been done unto them or if they’re able to provide their input through regular communication that could happen at the time.” Kaamil

“ Somebody like our ED is going to have a very big picture perspective, but they’re not necessarily going to be aware of all the details. So if they’re going to make a decision just based on what’s best in the big picture, they may be missing a piece of information from someone that’s working at an implementation level that’s still important even though it’s not [visible in] the big picture, or that might change their perspective, and I think that managers help to communicate that.” Kaamil

“We have a great diversity of people that work here. We have probably more women than your normal organization does, in high up positions as well, which is awesome, but might also contribute to the time it takes to make decisions ... because we often feel the need to
talk them out, ensure everyone’s happy (I just threw that out there, I don’t know if that’s true or not).” Tadewi

Summary of strategies to enhance positive aspects of hierarchy:

1. Multiple clearly articulated feedback and input structures for staff across the organization
2. Clearly articulated areas of autonomy and decision-making for staff across the organization
3. Nurture a supportive, lead-from-behind leadership culture that allows staff input and autonomy to be clearly recognized

Participants’ opinions on the value of hierarchy in the SAMRU were very mixed, with 91 positive and 98 negative mentions.

Social Belonging

C. Formal Inclusion

Formal inclusion refers to specific organizational language or processes that create inclusion. For example, specific mention within the SAMRU’s strategic plan of diversity as an organizational value creates formally-stated inclusion.

“Meaningful inclusion means, I guess, feeling that everyone belongs.” Branwen

“SAMRU has worked hard to tear down and prevent siloing within the organization. This I believe has gone a long way to creating workplace inclusion as the organization can be viewed as one rather than a group of groups.” Cailin

“There’s a social committee for instance, one of the things it organizes is Snack-and-Chats … every two weeks or every month a rotating group of [staff] prepare food and
everyone gets together to sit and chat, building relationships, and I think that’s a really important way of breaking down barriers and building ties.” Cameron

“I do think, because there’s an overarching value around inclusion, that there’s sort of a way of operating that tries to allow for inclusion, and to pick up pieces where they may have been missed, to make sure that that piece isn’t dropped.” Kaamil

Formal inclusion can also include elements such as location of workspaces and mentoring relationships with supervisors. This was demonstrated by participants’ sense of identification with the organization and its goals.

“I think [meaningful inclusion] is part of our identity, really, especially because our clients, the people we work for are students; knowing that students are all different kinds of people, we very much try and be inclusive and aware of diversity.” Branwen

“I have found in general that most work is held to the standard of legal parameters for workplace inclusion; however I think we still have work to do in creating a more inclusive frame of mind with regard to our everyday actions.” Kai

“When I [think] about inclusion, I think we do it really, really well … I think the SA is seen as a very safe environment, not just for staff, but for volunteers and the students, all our members.” Branwen

“I think that the organization cares about being fair.” Kaamil

Although these participants may have varying opinions of how readily inclusive the organization is in its daily processes, in these examples participants align themselves closely with the organization, using “we” language to describe challenges and goals, and speaking of the feelings and goals of the organization. One of the five disciplines Senge described as key to
learning organizations is building shared vision, the ability of leaders to “unearth shared ‘pictures of the future’ that foster genuine commitment and enrollment rather than compliance” (Senge, 2006, p. 9).

Participants gave examples of formal processes creating simultaneous frustration and value or hindering access, although still demonstrating high alignment with the organization:

“We have a lot of policy, which is frustrating, but important, I think. To determine roles and responsibilities, even the separation of the students versus staff, the roles and responsibilities; and clarity there helps.” Kaamil

“We have some formal processes to get certain work done, but even those processes, I find them an obstacle sometimes. I find it sometimes becomes almost necessary to approach people directly for whatever I may need, because those formal ways that we have, that formal permeability, it just doesn’t seem effective.” Oryn

“There are a couple of people were hired for whom English is a second language … I’m not sure how easy they find it to fully participate in organizational life. We do a lot of meeting, and planning, and communicating by e-mail. I’m not sure that they feel entirely included and feel a high sense of access to everyone in the organization.” Tayo

Another example of formal inclusion processes in the SAMRU that are nevertheless not mandated in any policy is the widespread use of Colour Insights™ profiles and training. Staff are encouraged to learn and understand their work styles and the work styles of colleagues, as well as to understand potential conflict and communication issues through the lens of different working styles. This alternate method of understanding and coping with difference has an extremely high level of buy-in across the organization, reflecting another of Senge’s five
disciplines, *mental models*—“deeply ingrained assumptions, generalizations, or even pictures or images that influence how we understand the world and how we take action” (Senge, 2006, p. 8). Werhane also discusses mental models, and how they directly impact our ability to imagine alternate possibilities within our system (2008).

When formal inclusion processes are in place, staff perceptions of belonging are high, and create an environment that encourages wholehearted participation.

“I find that most often when this environment exists, my work gets done faster and is of better quality.” Kai

“I feel really supported and free to help the students, and maybe if I didn’t have that support network, that base, I’d maybe be more reserved in my approach.” Branwen

Summary of strategies that enhanced formal inclusion:

1. Follow through on specific intentions mentioned in foundational documents
2. Enhance interdepartmental information flow in order to reduce departmental silos
3. Create formal staff recognition activities

Participants made 306 positive mentions of formal inclusion, and 81 negative mentions.

**D. Social/Informal Inclusion**

This element speaks to the less tangible but crucial social bonds built between individuals and groups in the organization. Examples given of this are conversations between team members, a general sense of belonging and being seen as an individual, an ability to be fully and safely oneself at all times. Together with formal inclusion, social/informal inclusion forms the social capital of the organization that is so crucial in complex adaptive systems, balancing the consistent influx of newness and difference (Axelrod & Cohen, 2000).
“A lot of the informal, a lot of the permeability and access comes from people’s personalities, a lot of people are approachable and giving, that’s my experience. I think it’s the biggest strength when it comes to inclusion.” Oryn

“There might be a level socially on which other people avoid speaking to [staff with English as a second language] because they find communication difficult, so I think there may be a number of levels on which there are [staff] who do not feel a high sense of access, and it relates directly to the identity group that they’re from.” Tayo

Tayo’s example of staff that may be experiencing exclusion due to language barriers is being partially addressed by management with formal inclusion processes; Tayo notes elsewhere that s/he believes senior management to have suggested or provided language learning opportunities for the staff in question. There has also been consideration given in the most recent restructure to provide these staff with supervision that also provides adequate language support and bridging to the rest of the organization. This relates to the concept of standpoint discussed by Bullis and Stout. The ability of staff to have their identity-based standpoint made visible and valuable within the organization is crucial to social inclusion (Bullis & Stout, 2000). Participants pointed out the significant difference that subtle cues can make in the social environment:

“I definitely feel like I have to be aware of my blind spots, making sure that I work on those, making sure to include [everybody]. I’d define blind spots as areas I’m uncomfortable in … there are areas I maybe get uncomfortable with, and just recognizing that it’s okay to be uncomfortable, and to try to work with that, making sure I’m aware of that, and including people anyway.” Branwen
“Perhaps because generally speaking the workplace and my colleagues seem to be open to diversity of all sorts, we make that assumption that everyone is, and then at times I find out that perhaps some people aren’t as open. If you go into someone’s office and they’ve circled the word ‘diversity’ and put WTF or OMG next to it, then you wonder what they really think.” Cameron

“You can do better work with people you know and trust.” Tayo

Above, Branwen describes a significant element of decolonizing behaviour; recognizing one’s biases and prejudices, and being willing to experience the discomfort of that recognition while working to dismantle the impulse to exclusion (Prasad & Prasad, 2002). This is an element that is often lacking in diversity management environments, where a great deal of the work that is done focuses on mitigating or assuaging comfort of staff members unaccustomed to working with diverse groups and individuals (Agócs & Burr, 1996, p. 39). There are widely varying levels of experience and comfort in any workplace regarding engaging across difference. A key element of social/informal inclusion is to recognize this discomfort, name it, and be willing to work through the discomfort as an exercise in personal mastery (Senge, 2006, p. 7).

Summary of strategies that enhanced social/informal inclusion:

1. Encourage staff to recognize and accept occasional discomfort stemming from difference, and to work through it

2. Encourage a culture of mutual mentorship

3. Leaders watch for common areas of social exclusion, and be prepared to create specific bridging opportunities

Participants made 125 positive and 32 negative mentions of social/informal inclusion.
E. **Intent and Culture**

Intent and culture is a somewhat intangible concept that connects both to formal inclusion and structural principles, involving whether or not an organization ‘walks its talk’. So, for instance, although clearly articulated principles may exist around fair pay, are the organization and its leaders seen to embrace the spirit of these structures? Are principles applied consistently and fairly in every instance? Is it a generally accepted fact that the organization behaves in a consistently authentic manner, according to its own principles? Is this authenticity reflected in the behaviour of staff?

“*Tone at the top goes far in communicating to all staff that opinions and people are valued.*” Cailin

“It’s demonstrated, I think, in leadership. That some of the senior managers are expected to demonstrate that they’re open and accessible and adhering to ethics. It’s not dictating that this is how we should be, but showing it.” Cameron

“When I first applied for this job, I wanted to make sure that my values would match with the organization, so when I was being interviewed I made sure to ask a lot of value questions … the answers I got back moved me to want to work here. Inclusion was mentioned a lot.” Branwen

“I believe that the organization values inclusion. I think that there’s a recognition of the benefit of including people and having them feel connected to the organization.” Kaamil

“Inclusiveness at the SAMRU is more than just access, it’s required for success. Personally, this level of inclusiveness makes me uncomfortable as I would prefer to interact much less, however … others don’t interpret it as simply someone who prefers to
just do their job and go home; they see it as someone acting counter to the culture and feel as though that person must be unhappy with the organization. I participate in and perpetuate the unwritten personnel ‘inclusiveness mandate’ because I see its overall positive effects and recognize that it is rewarded.” Cailin

“We’re expected to know … what’s expected, and told that we should be modeling good, ethical, open behaviour. But we’re not necessarily told to be open to diversity, or to ensure that we’re looking at specific things when it comes to diversity. I don’t think that’s a good or a bad thing. Maybe it’s just one of those things that’s unsaid.” Cameron

I addressed the concept of hierarchy earlier; a key aspect of hierarchy is leadership.

Several participants described SAMRU leadership as a group that delivers mentoring, role modeling, support, clarification, and connection between various parts of the organization.

Consistently designed leadership behaviour also creates evenness in organizational behaviour.

One of the five disciplines Senge described as key to a learning organization is building shared vision; this is an element that requires leaders who can “translate individual vision into shared vision”, a shared vision that fosters “genuine commitment and enrollment rather than compliance” (Senge, 2006. p. 9). This is also true of a meaningfully inclusive organization.

Summary of strategies for enhancing inclusive intent and culture:

1. Nurture communication and conflict management skills in leadership
2. Leadership provides consistent mentorship and role modeling

Participants made 392 positive and 54 negative mentions of intentional culture.
Organizational citizenship

F. Perceived ability to impact the organization

Do individuals see their efforts making a difference within the organization? Can staff members identify lasting impacts that they have had on structures, intent, or culture? Organizational openness to change is directly linked to staff’s perceived ability to impact the organization. The more space made by leadership for innovation and input by staff, for Senge’s “thinking together” description of shared influence, the more powerful and influential staff see themselves to be, and the harder they work to contribute to the organization as a whole.

“The work that I do at the SA has a great deal to do with inclusion and I try my very best to create an environment of inclusion around me.” Kai

“What I perceive … is that we really strive to make community and create a sense of belonging.” Branwen

“Decision-making regarding strategic priorities is presented as requiring organizational buy-in … which gives staff at all levels the elevated sense of responsibility and the feeling that they really do have influence.” Cailin

Participants spoke of their efforts being important to the organization in its efforts to achieve its goals:

“I have to be really aware of meaningful inclusion, making sure that [everyone is] treated fairly; and because it’s a really big focal point for the SAMRU, that carries on through my work.” Branwen

“I have to work to include others in decision making, and to actively seek out feedback in order to fit into the organizational culture. I’m careful with decision making to ensure
that the interpretation of my choices aligns with the values of the organization—this
includes the topic of inclusiveness.” Cailin

“A lot of my role is helping people to see parts of the picture that they can’t necessarily
see, and I think that plays a role in how they feel connected. So whether or not they feel
something’s been done unto them or if they’re able to provide their input through regular
communication that could happen at the time.” Kaamil

Participants reported on this element in terms of feelings of autonomy, satisfaction
regarding the importance of their work, relevance of their values to the work and the
organization. A critical element of inclusion for participants was the ability to give back, to have
to opportunity to create change and improvement, not only for the sake of personal opportunity,
but from an urge towards social responsibility. As Cailin notes, staff are likely to work hard to
ensure that those contributions align to organizational values (Senge, 2010, p. 9).

Summary of strategies to enhance perceived ability to impact the organization:

1. Multiple clearly articulated feedback and input structures for staff across the organization

2. Clearly articulated areas of autonomy and decision-making for staff across the
   organization

3. Organizational strategic goals and values are arrived at with significant staff input

Participants made 320 positive and 90 negative mentions regarding perceived ability to impact
the organization.

G. Openness to change

Like "freedom" and "love", "participation" is difficult to define precisely … flexible
organizations require that people participate beyond their jobs. Everyone needs to
understand and contribute creatively to the overall purpose of the organization. That kind of participation ... is much harder to achieve. The effort is worthwhile. It will result in a company where [staff] unite to overcome barriers, resolve problems and carry the firm through to a higher level of achievement (Hecksher, 1997, p. 2).

This category can best be described as the general organizational tendency to say “yes” or “no” to newness. This also describes how often an organization will rearrange itself to accommodate newness, versus expecting new incoming elements to rearrange to accommodate existing organizational norms.

Openness to change can be one of the most challenging aspects of a complexity theory approach to inclusion, because it requires a sharing of influence, a willingness to allow the organization to be changed by a process Senge called team learning, or “thinking together” (2006, p. 10). Senge said, “to the Greeks dia-logos meant a free-flowing of meaning through a group allowing the group to discover insights not attainable individually” (2006, p. 10). This is the heart of permeability, this understanding that the leadership status quo cannot by itself gain the insights necessary to shift culture. Ironically, the most important act of leadership is to allow this organizational thinking together, and to allow the resultant insights in.

“The interesting thing is ... from 2004 to now, 2013 ... all of the benefits and protections for staff that are in place now were in place then. And yet the culture has changed significantly ... why did the organization allow itself to move from that position to the position we find ourselves in now?”
“At times when I first started it felt a little bit, you know, sort of ‘old boys’—that didn’t happen all the time, but there were certainly instances of it—and we’ve moved way beyond that.”

“When I first started … the culture was fragmented with departments silo-ed. Now … the culture very much demands inclusiveness.”

In fact, Tayo is partially incorrect in saying that everything in place in 2013 was in place in 2004; key structural principles already discussed—such as the job classification and salary benchmarking—were developed and entrenched with the advent of the current Executive Director. This alludes to a key reason for the shift in cultural openness that Navya describes, however—the shift in leadership that occurred in late 2000. Senge and Mella both discuss systems theory; the understanding that any complex system is more than the sum of its parts (Senge, 2006; Mella, 2012). It is overly simplistic to lay the shift in culture at the feet of a single agent; however, the role played by leadership in turning the ship of organizational culture is critically important.

Carlin also brings a powerful insight about the role siloing plays in fracturing the organization’s ability to “think together”. A system that does not recognize itself as a system, but is instead acting as multiple pseudo-independent systems, cannot achieve its “more than the sum of its parts” potential (Mella, 2012).

Summary of strategies to enhance openness to change:

1. Leadership are rewarded for bringing staff ideas forward with proper credit;

2. Enhanced record-keeping of shared input and decision-making processes, to create an organizational memory of openness to change
Participants made 238 positive and 53 negative mentions of openness to change in the SAMRU.

Limitations and Recommendations for Further Study

The most limiting element of the study is the size of the sample. Although a sample of nine within a full-time staff of 33 represents a significant part of the full-time staff perspective at the SAMRU, it is nevertheless a small sample. Further research might increase the sample size across a variety of organizations in order to test the conclusions drawn here.

This study did not include the input of student volunteers, who play a unique and significant role within the organization; the student executive and governors, who form the board of directors of the SAMRU; and the students at large who form the general membership of the SAMRU. As the organization exists for the sole purpose of supporting and serving students, the organizational relationship to its membership is qualitatively different than its relationship to staff, and I felt it important to delimit my focus in order to adequately explore the idea of meaningful inclusion in the workplace. However there is a complex and intricate interplay of power and vulnerability for students with regard to the SAMRU. While it would muddy the water of this particular study, this complexity could form a provocative basis for future study.

The study also did not include part-time staff. As mentioned earlier in the paper, there is a significant difference in how the SAMRU treats part-time and full-time staff, which may certainly have affected part-time staff’s desire to participate in a study of this kind. There could perhaps be additional learning to be gleaned regarding the different perceptions of part-time versus full-time staff about the SAMRU as a workplace, and the assessment of the inclusiveness of SAMRU as a workplace might be very different if part-time staff input was included.

However, since the study was also grounded in a wide array of cross-disciplinary research about
successful principles for creating meaningful inclusion, I do not believe that the absence of part-
time staff input would have shifted the applicability or usefulness of the Inclusion Matrix as a
tool for understanding and creating inclusive environments.

As an exploration of an organization in a settler society concerned with diversity and
inclusion, it would have been valuable to include indigenist perspectives on inclusive workplaces
within the literature review. Unfortunately, I was unable to locate research of this nature situated
in the North American context. Further focus on how an indigenist perspective might mesh or
conflict with the inclusion matrix could be valuable.

This case study focused on a non-profit students’ association; there might be some
question about how applicable information learned here is when applied to other organizational
structures. Again, the grounding of the study within a broad cross-disciplinary array of research
connects this particular setting to the larger Canadian workplace context.

In addition, although the SAMRU is an autonomous organization, it is inextricably linked
to Mount Royal University. While this study does not in any way explore or implicate
meaningful inclusion within the university-as-workplace in its analysis, this would also be
provocative grounds for future study.

There are potential links between meaningful inclusion and creativity that might create
interesting avenues for further study. Does a high sense of belonging link in any way to
heightened creative output?

As the vast majority of North American workplace research focuses on a United States
context, there is also an urgent need for further study of inclusion and permeability in the
Canadian workplace, particularly within the under-studied non-profit environment, but also in
the larger workplace context.

**Recommendations for SAMRU**

One of the curiosities I had coming into this research concerned how, with very little
documentation of a value around workplace inclusion, the SAMRU had managed to create such
a reputation as a diverse and inclusive workplace. In concluding this study, I believe that the
reason lies in the organization’s focus on, and stated value in being, a learning organization. As
demonstrated throughout the study, the characteristics and strategies of a learning organization
can carry it a significant distance towards becoming a meaningfully inclusive organization. On
the whole participants felt seen, valued, and included in the SAMRU, and consistently identified
it as an inclusive workplace in six of seven categories. In the category of hierarchy, opinions
were split evenly between positive and negative experiences.

There are some areas where either research or participant input identified gaps for the
SAMRU as a meaningfully inclusive workplace. I will detail these gaps below, aligned with the
applicable Inclusion Matrix categories.

**Intent and Culture**

“There’s a division that occurs between the student voice and the staff, and the staff are
sometimes floating out there and not fitting in. The organization has tried to mitigate that
in some ways, but it’s still something that’s experienced. I think it’s challenging.” Kaamil

One of the most common shared beliefs among participants regarding meaningful
inclusion at SAMRU was that inclusion offered to the membership constituted proof of
organizational intent to be inclusive in general, even though the workplace does not have the
same inclusive structures and processes. There is also a link to the perceived ability to impact the organization, as staff appeared to feel that the ability to enhance inclusion for the membership in turn created an enhanced feeling of inclusion for staff. This was most demonstrably true for front line staff in regular contact with the membership; the perceived link was not as evident for staff with less front line contact. Participants also had surprisingly little awareness of the structural elements supporting workplace inclusion. Senior management were likely to draw this connection, while front line staff either did not know about these strategies, or did not connect them to the topic of inclusion.

Recommendation: Consider developing a specific statement of how inclusion is supported within the workplace. Particularly since front line staff considered organizational intent to be a significant marker of a meaningfully inclusive workplace, such a document would further state this organizational intent.

Formal Inclusion

Although mentorship was widely understood to be a valued attitude and service provided by leadership to the rest of staff, it is a largely unwritten and untrained service. One of the elements that may stem from this lack of specific mentorship skills was the observed social/informal marginalization of staff with English as a second language. It may be that more specific mentorship across the organization regarding working through discomfort may help to mitigate this perceived weakness.

Recommendation: All staff engaged in leadership activities may benefit from more explicit training in how to create a mentoring relationship, and a more explicit valuing of that element of leadership within job descriptions and evaluations.
Structural Principles

The concept of organizational fit is potentially troublesome, unless underpinned by a specifically inclusive model. Fit has often been used as a means to exclude diversity from organizations. It was articulated by a participant with a specifically inclusive intent, but this is not recorded anywhere, and may be open to abuse over the long term. Recommendation: If fit is used as a criterion in the hiring process, it is important to articulate the boundaries and intent of the concept more clearly and specifically.

Conclusion

Despite the rapidly increasing heterogeneity of Canadian society, Canadian organizations struggle to reset diversity management-based assumptions about how to increase diversity and inclusion in the workplace. As theorists and practitioners, we can begin to address this failure with a linguistic and perceptual shift from diversity management to meaningful inclusion. Next, organizations can employ a matrix of meaningfully inclusive principles and strategies that form a practical roadmap to the creation of meaningfully inclusive workplaces. Finally, organizations that employ models such as learning organizations and systems theory are particularly well-prepared to take the final steps towards becoming truly meaningfully inclusive workplaces.
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SAMRU as Research Site

The SAMRU is a Canadian non-profit association. The non-profit model differs from traditional for-profit organizations with its human service focus rather than a focus on profits, it is nevertheless a core sector of Canadian society, with “hundreds of thousands of dedicated organizations providing tangible services that are essential to our quality of life – in health care, education, the economy, social services, employment, the environment, the arts, culture, recreation, and virtually every area of daily living” (Goldenberg, 2004, p. 2). Bradford describes the potential weight and import of non-profit organizations on Canada’s future thusly:

Two decades of economic restructuring, the globalization of competition, and rapid technological change have combined to create a world of great uncertainty and complexity… Simply put, innovation—applying the best ideas in a timely fashion to emergent problems—is an urgent priority in the private, public and voluntary sectors. …

Today, the importance of innovation extends well beyond the economy and the workplace. Many of society’s greatest challenges—from achieving ecological balance to creating meaningful employment for all citizens—equally demand new thinking, organizational creativity, and institutional adaptation (Bradford, 2003, p. 1).

Clearly then, non-profits have a significant leadership role to play in developing workable systems and strategies for increasing meaningful inclusion in the workplace.

Goldenberg also describes the non-profit sector as a significant source of social innovation, and in fact a significant driver of major elements of commonly-accepted Canadian national identity, an identity based partly in the social safety network, and the provision of services such as
universal health care and education (2004, p. 2). These social and interpersonal aspects of innovation are increasingly being recognized and understood to be critical to the innovation process. People play a key role in the innovation process as the “creators and carriers” of knowledge. And “community-based organizations—with the tremendous human resources that they can mobilize, both through volunteers and paid professional staff—can play an important role in fostering this ‘social learning’ and providing a context and venue for innovation” (Goldenberg, 204, p. 2).

The SAMRU has an anecdotal reputation within its membership and staff for being inclusive and welcoming of diversity. As a membership association of students, it has existed for over 100 years. SAMRU has been housed in its current location, a student-owned building called Wyckham House on the grounds of Mount Royal University, since 1987. As a students’ association, it is led by a governance-focused student council of 17, with a full-time executive committee of four students, who attend one class a semester while shouldering full-time representational duties (attending university committees, sitting on decision-making boards, lobbying government). All credit students of Mount Royal University pay mandatory fees and become members of the SAMRU. All work done by the SAMRU is therefore focused on providing support and services to the membership.

Within the SAMRU workplace, human resources are divided into three groups: full-time staff, part-time staff, and volunteers. The volunteers are also members of the organization, and as such are a focus of staff efforts and service provision, and they in turn provide outreach and services to their peers on campus. Part-time staff are also almost always students and members of the organization. Full-time staff may also occasionally be students, but as a paid role with the
organization increases, access to membership rights and privileges decrease. Staff are expected to align with organizational values and perspectives, particularly where those might conflict with personal attitudes as a member.

To create a picture of the human resources operating at the SAMRU, there are currently 33 full-time staff (32 salaried, one waged), 125 part-time staff (all waged), and approximately 300 student volunteers, serving a membership of approximately 12,000 credit students. The number of part-time staff varies throughout the year, with most employed during the fall and winter semester months (September through April). Full-time staff are generally salaried, and all have full access to benefits including a health and dental, disability and life insurance plan, as well as RRSP contributions. Part-time staff are waged, and do not have access to the health plan or RRSP contributions. Part-time roles are often casual, or internship-level (called Administrators), while full-time positions are administrative or professional. Part-time roles are also heavily weighted towards front-line service provision (wait staff, bartenders, kitchen staff, and door staff within the campus bar/restaurant; interns, loaders and technical staff, including sound technicians-in-training). Full-time staff are divided between front-line service provision roles at Coordinator level (approximately 16 full-time staff provide constant or regular front-line service), and either support staff at Coordinator or Manager level (approximately 12 full-time staff in behind-the-scenes or supervisory roles) or leadership roles at Director level (six staff in these positions), with support and leadership staff occasionally providing front-line service.

Part-time staff roles tend to demonstrate high turnover. Internships, which are part-time but embedded together with the work of full-time staff, tend to demonstrate retention through the academic career of the students holding the positions. Students who have held intern roles often
apply for entry-level professional full-time positions once they are finished with their academic careers at MRU, and these entry-level professional positions are often filled with previous members and volunteers. There is, therefore, a perception of high permeability between the membership and staff groups.

There is a high level of retention in full-time positions. All six directors worked their way up the organization’s hierarchy, three originally from volunteer/student council roles, and three from entry-level professional positions. Four of the six were students and members of the SAMRU before becoming staff. Of the 33 full-time staff, four have been with the organization less than a year; the remaining 29 have been with the organization at least two years. Six have been with the organization 10 years or more. Eighteen of the 33 full-time staff have held multiple positions or jobs within the organization, and 16 have worked in more than one team or department, demonstrating a high level of permeability within the organization. There is a perception that the organization values staff with experience of the organization, and will hire internally when possible.

Student executive committee positions are elected annually, and student council governors’ roles are elected bi-annually. This means a consistent and high mandated turnover in organizational leadership. Given the high levels of full-time staff retention, a great deal of anecdotal organizational memory rests with the staff, creating tensions between those holding information and those holding decision-making power. For a mid-sized non-profit, the SAMRU has a great deal of rigid organizational structure and policy, in part to cope with this high leadership turnover. High levels of structure are designed to create clarity for workload management and information flow, and high amounts of written policy and procedure represent
preserved organizational memory regarding structure and process. The organization is also consistently managing tensions regarding the appropriate amount of structure, balancing power/information concerns one the one hand with retaining as much flexibility and responsiveness to membership input as possible on the other. Organizational structures and processes covered in policy include organizational structure and services, staff recruitment and hiring guidelines, job classification and pay scales, staff benefits such as flex, holiday, and sick time and other paid leave, discipline and appeal guidelines. In 2012 senior management drafted a proposal for the restructure of part-time vs. full-time/salaried vs. waged classification systems and related benefits accrual. This proposal is currently with the organization’s lawyers for review.

Twelve years ago, the SAMRU experienced significant financial difficulties as well as serious conflict with Mount Royal University, due to poorly managed finances. The current Executive Director had recently been promoted to the position; a great deal of the current structure—particularly concerning financial and reporting structures—was developed in the wake of that crisis. The organization has been through two major restructures in the last nine years; neither involved ‘downsizing’ or loss of staff; both were conducted to reorganize work groups to improve internal communication flow and effectiveness of services. In 2008, the SAMRU engaged in a significant building and service expansion, doubling the footprint of Wyckham House, and eventually increasing services and staff numbers. The most recent restructure was implemented in January 2013, immediately prior to data collection. The uncertainty, stress, and occasionally excitement that accompany organizational change may have impacted the responses of participants in this study; of the nine participants, three were
promoted, one transitioned laterally, one changed departments but stayed in the same job, and three were unaffected.

The SAMRU occupies Wyckham House on four floors. Wyckham House is divided roughly in half, with slightly more than half the spaces in the building providing services and unfettered access for members, and slightly less than half providing offices and meeting space for staff. Staff are dispersed throughout the building according primarily to job function, and proximity to core work; where possible, offices are embedded in direct service spaces. All full-time staff have dedicated, permanent workspaces with computers, phones, desks, and storage space; almost no part-time staff do, although intern positions are usually assigned temporary dedicated spaces. The executive committee members have their offices grouped down a single hallway that is generally not accessible by the staff; otherwise, staff workspaces are not organized with regard to hierarchy. In some cases, staff are grouped together: Programming staff share a communal workspace, graphic design staff share a communal workspace, as do the staff of the Copywrite Centre. Most staff work in multiple spaces, and are generally functionally mobile throughout the day, moving often through the staff and member spaces of the building, and beyond into the general campus.