Edited by
Carlos Tasso Eira de Aquino · Ronald R. Rojas

Diversity and Inclusion in Latin American and Caribbean Workplaces

Experiences, Opportunities, and Challenges

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Dr. Carlos Tasso Eira de Aquino is the Director of Business Development and Community Relations at Bryant & Stratton College, North Chesterfield, Virginia. He is an accomplished senior executive and professor combining a Ph.D. and two postdocs with over 15 years of international experience in leading companies and higher education organizations, with demonstrated success in the building and guidance of diverse teams to successfully solve complex, systemic problems. Along the years, he has developed an extensive scholarly production in business, sports management, education, and STEM.

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Meagan Scott is a fourth-year doctoral student in Clinical Psychology at the Florida School of Professional Psychology at National Louis University. She graduated with a master of arts in Clinical Psychology from FSPP in 2018. Meagan currently works with patients dealing with severe and persistent mental health issues, substance abuse, and incarceration.

Dr. Nilda M. Seda-Cuevas obtained a Juris Doctor (J.D.), a master degree in Business Administration at the Catholic University of Puerto Rico, and a doctorate degree (Ph.D.) in Management with a sub-specialization in Entrepreneurship from Walden University. As a tenured professor, she teaches at the Pontifical Catholic University of Puerto Rico., where she teaches law and business. She has also been active in administrative and extracurricular activities, such as Director of the Small Business Institute, S.I.F.E. coordinator, and the Management, Marketing, Communications, and Computers Department, and leader of the Educational and Business Process Management Standard for the accreditation of our Business School by the Accreditation Council for Business Schools and Programs (ACBSP).

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CHAPTER 1

Introduction

Carlos Tasso Eira de Aquino

The Latin American region is recognized as an attractive location for global competitive expansion. After years of recession in many of these countries, growth is expected to accelerate during the upcoming years as many of these countries move from a commodity market to learning the rules of global competitiveness. More companies today are contemplating countries in Latin America, Central America, and the Caribbean to set up manufacturing facilities, distribution centers or services operations, as a form to expand their global footprint, particularly in the automotive and pharmaceutical industries, and in the tobacco, health, and beauty aids markets.

Latin America is a paradoxical region in that it has unique situations that keep attracting businesses, and yet many of the countries in the region also face serious challenges that can undermine many of these prospects. This movement toward Latin America could remain active, but management practices need to contemplate the distinctiveness of the workplace's collective spirit. Some global corporations doing business in

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Latin America have already observed that although many management and workplace practices originating in North America have met some success, there is also evidence of rejection and disappointment. A challenge for companies seeking competitive advantages in Latin America consists of creating a workplace environment where locals can work together effectively, and this means recognizing and taking into consideration local idiosyncrasies when implementing modern practices.

One modern practice that has proven to enhance operational effectiveness, innovation, and global competitiveness is Diversity and Inclusion in the workplace. Yet the perceptions of Diversity and Inclusion foundational to the strategies prevalent in the United States are shaped by its history, traditions, and culture and are quite different even among the Latin American countries. The simplistic assumption that Hispanics are all defined by a few cultural factors—whether from Central America, South America, Mexico, or the Caribbean—is misguided. Although there are commonalities among the cultures and subcultures within the Latin American region, there are also significant differences. To that point, it should be added that half of South America's population is composed of Brazilians, whose origin is the Portuguese culture and traditions, and very different from the Hispanic Latin America. If perceptions are influenced by local national cultures and subcultures, then it follows that a variety of cultural differences between North America and Latin America also implies a variety of approaches to workplace values, and more specifically, to the understanding of Diversity and Inclusion.

This book follows a previous book published in 2018 by Palgrave MacMillan: *Diversity and Inclusion in the Global Workplace: Aligning Initiatives with Strategic Business Goals* (Aquino & Robertson, 2018). The first book created the foundation for a better understanding of Diversity and Inclusion, through the discussion of concepts and examples that could be applicable to the global workforce and workplace (Aquino & Robertson, 2018). This second book addresses specific topics that are relevant to Latin America and the Caribbean (LAC), areas that have experienced a more traditional society and a faster economic growth in the past decades. By bringing those topics into a book, the authors intend not only to expand the discussion of Diversity and Inclusion to a regional perspective, but also create awareness of regional issues that can impact the successful operations of global/multinational corporations and organizations that have customers and suppliers in this part of the world.

As it is said above, the workplaces in the Latin America and Caribbean regions in many ways present a paradox in that it has unique conditions that keep attracting businesses and yet many of the countries in the region also face serious challenges that can undermine many of these prospects. This book addresses specific topics related to Diversity and Inclusion in the workplace that are relevant to LAC. By bringing those topics into a single textbook, the authors intend not only to address issues of Diversity and Inclusion from a regional perspective, but also foster awareness of regional outcomes that can impact the successful operations of global/multinational corporations and organizations that have customers and suppliers in this part of the world. This is a two-part book, where Part I addresses some of the emerging frameworks on Diversity and Inclusion in LAC workplace and Part II lunges into some of the country-specific actualities. The uniqueness of this effort resides in making available a single collection of workplace experiences, opportunities, and challenges that emerge from the nuances of Diversity and Inclusion dynamics in Latin American and Caribbean countries.

Part I presents a macro-perspective of Diversity and Inclusion in the Latin American and Caribbean workplace and includes Chapters 2 through 7.

Chapter 2 describes a proven framework that has successfully been used in the United States, and it is starting to be used in LAC in fostering and achieving Diversity and Inclusion scholarship. The focus of this chapter is to reinforce the educational component in preparing a diverse and inclusive workforce in Latin America and in the Caribbean. A thorough discussion of Scholarship and its relevance in the educational process is included. Its importance is highlighted and enforced by different accreditation bodies all over the world, as an effort to pursue quality and relevant content in higher education. Besides being a learning provider, educational institutions also need to become and remain learning organizations, and the myriad of faculty, alumni, and students related to them should believe and act toward lifelong learning. Diversity and Inclusion is one of the most challenging topics we live today in a globalized and multi-cultured workplace. Scholarship in Diversity and Inclusion must remain at the forefront of institutions that are expected to remain competitive within the educational sector and be recognized as role models to the society they serve.

Chapter 3 discusses cultural influences on Latin American perceptions of inclusion and diversity. In that context, the literature tendencies on global organizational development are showing a shift in emphasis from

diversity as a mandate toward inclusion as a workplace value, and therefore, to approaches that are more in step with interpersonal and relational frameworks. Consequently, this shift has also prompted research beyond the traditional American-European view of inclusion, where now more consideration is being given to the moderating effects of other national cultures. Along with these trends, this chapter argues that perceptions from national cultures within Latin American countries play a significant role in formulating Diversity and Inclusion strategies. In Chapter 3, the author argues that values typical of most Latin American and Caribbean countries as portrayed in Hofstede's cultural dimensions reinforce the notion that native cultures have a moderating effect on inclusion and diversity views and suggest these constructs are perceived differently than interpreted in most North American strategies and training programs. This chapter highlights the relevance and implications of Latin American and Caribbean cultural values upon Diversity and Inclusion perceptions.

Chapter 4 discusses the role of women entrepreneurs in LAC. Despite the obstacles they face, women entrepreneurs in LAC countries are achieving greater gender parity than in other parts of the world. The LAC region has the strongest entrepreneurial culture in the world, with greater gender parity than most other regions in terms of startup and total early entrepreneurial activity. The chapter focuses primarily on the drivers of entrepreneurial success for women in LAC countries, analyzing how culture, catalysts, supports, and governmental and private sector initiatives and partnerships are fostering women's entrepreneurship in this region. It also includes examples of model initiatives and women entrepreneurs in the LAC region.

Chapter 5 covers the topic of workforce diversity in ports, comparing the global reality, and examples from Canada, with the Latin American and Caribbean perspectives. Cargo handling in seaports throughout the globe has traditionally been a male-dominated occupation, particularly when muscle-power was an essential occupational requirement for physical lifting and hauling heavy commodities. In recent decades, however, the need for "brawn" has been replaced with "brain and aptitude" required to operate sophisticated cargo-handling equipment. In today's ports, women are increasingly being recruited into this traditional male environment as "work within ports has become less physical, even in port operations that require more physical jobs, women can perform equally

well as men." This chapter examines the challenges women face in working in traditionally male workplaces and suggests steps for ports, particularly throughout LAC, to attract women port workers. In the scope of this chapter, the term "port workers" encompasses dockworkers, longshoremen, stevedores, checkers, linesmen, and forepersons.

Toxic leadership, as discussed in Chapter 6, is seen as an extreme negative behavior highly damaging to the workplace and employees. Exceptional considerations may influence the rationale for individual tolerance of toxic leaders. The chapter presents two case studies with different perspectives of leadership within a diverse and inclusive workplace, one drawn from a multinational workplace perspective and the other from a military management view with Latin American and Caribbean experiences. Although the narrative inquiry approach into the stories may not be generalized, the insights derived from the exploration may benefit organizational leaders, scholars, and practitioners in ascertaining patterns within organizational members with diverse characteristics and the effects on the workplace culture and objectives. Most importantly, the identification of the rationale for individual tolerance may assist organizations to mitigate the influence of toxic leader behavior in the Latin American and Caribbean workplaces.

Chapter 7 focuses on the harsh reality and challenges faced by transgender and gender diverse workforce in LAC. Transgender, also known as "trans," is an umbrella term that discusses a person whose gender identity varies from the antiquated gender binary system and one's sex assigned at birth (Hyde, Bigler, Joel, Tate, & van Anders, 2019). Gender is on a continuum, and nowhere on that continuum should it be considered pathological. Transgender and gender diverse individuals, also referred to as gender minorities, are often marginalized and invisible, even among their lesbian, gay, and bisexual community members. As a result, they often live in the margins with consistent societal pressure to conform to the heteronormative and cisgender way of life. This conformity leads to shame, invalidation of the trans person's lived experiences, and stigma. Contemporary sexual and gender minority (SGM) research continues to explore the devastating impact of stigma, social exclusion, and systemic oppression on overall mental and physical well-being.

In Part II, consisting of Chapters 8 through 12, the focus turns onto individual countries and issues related to Diversity and Inclusion within the boundaries of those nations.

Chapter 8 is devoted to gender diversity in the Bahamas, and the vocational skills gap that hinder the workforce in that country. The chapter explores the current situation concerning diversity and workforce skills as essential components of the competitiveness of the Bahamian economy at a time of significantly increased global competition and economic insecurity in many markets. Specifically, the chapter provides an overview of the perceived skills gap in the Bahamas and identifies ways that this gap can be closed, including enhancing the use of a diverse workforce and the use of technology such as online learning. A case study on the challenges faced by a community college in the country that is a main player in improving workforce skills is also included in Chapter 8.

Chapter 9 focuses on a comparison of gender diversity in seven countries in the Hispanic South America: Argentina, Bolivia, Colombia, Ecuador, Paraguay, Peru, and Uruguay. Gender Diversity in organizations has been attracting a significant degree of attention from multiple sectors, such as the educational, business, governments, and from civil society in general. One of the reasons for its relevance has been the lack of consensus about its true impact on these sectors. At best, there are conflicting and inconclusive results. Some studies have shown that gender diversity in organizations is related to the organization's growth, innovations, increased performance, and development. Other studies show that if there is an adequate mix of gender diversity, financial performance also tends to improve. Further studies show there is a significant positive relationship between the percentage of women (both on the boards of the organizations and in management positions) and reduced vulnerability to a financial crisis. In contrast, studies conducted by other researchers have shown there is no statistically significant relationship between gender diversity in organizations and factors such as financial, innovation, and increased performance. This chapter presents a comparative study, using secondary data, to show the relationship between gender diversity and organizational development and innovation in the seven countries included in the study.

Chapter 10 presents a discussion on the topic of Striving for Equity in Higher Education in Brazil. An attempt to address the lack of racial diversity in the Brazilian educational system was met with the affirmative action quotas for students entering the university level, public paid institutions. Despite the government-driven initiatives, the gap in filling the spaces reserved for non-White students evidences the reality that for non-White students to successfully compete for those scholarships, quality education and support from government and educators must begin

for students in elementary school. This chapter will examine the current policies and scholarship practices in place to leverage racial equity in education in Brazil. Further, suggestions to what could be done to lessen the gap of diversity and racial equality in educational arenas in public and private sectors will be examined.

Chapter 11 highlights the relevance of initiatives aimed at intensifying Diversity and Inclusion endeavors within the workplace for the disabled as well as for other vulnerable populations in Colombia. In doing so, these efforts intend to achieve reductions in poverty, inequality, violence, and mitigate social exclusion. Formulating effective workplace Diversity and Inclusion strategies also represents a calling for a wide range of professionals to collaborate in generating realistic strategies, therefore attaining the insertion, permanency, and promotion of disabled persons, leading to improved business performance. Accordingly, the Columbian Rehabilitation School recognizes the urgency to establish multiple partnerships and propose strategies with the business sector that allow the effective operationalization of the Diversity and Inclusion policies favorable to Colombia's development and in line with the objectives stated by the International Labour Organization, the UNESCO, and Colombia's National Development Plan-Pledge for Equity.

In Chapter 12, the focus is to compare workplace diversity perceptions between American (USA) and Hispanic populations, using samples of business students located in the continental USA and Hispanic students, using the Reaction to Diversity Inventory (RDI). The study outcomes suggest that Hispanic perceptions of diversity are quite different than may be intuitively perceived or portrayed in the literature. The results of this research can lead to a conclusion, reinforcing what is found in the current literature, that collecting and analyzing perceptions can help determine if an organization's workplace is viable to support diversity initiatives. This chapter illustrates how cultural values of majority-minority populations can potentially impact the design and implementation of diversity initiatives, especially within a global workforce environment.

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PART I

Diversity and Inclusion: The LA&C Region

CHAPTER 2

Diversity and Inclusion Scholarship: A Latin American and Caribbean Perspective

Carlos Tasso Eira de Aquino

Introduction

Higher education institutions around the globe face constant challenges stemming from factors such as societal needs, government regulation, competition and innovation within the educational sector, changes in workforce requirements, and the pressures of a world without borders, shrunk by the forces of globalization. Like companies in any other industry, educational organizations must compete with institutions all over the world. Students in any one part of the globe can opt for not attending classes locally, given the ongoing technological advances in distance learning. Notwithstanding these advances, the survival of institutions primarily depends on developing a competitive advantage by delivering high-quality programs and complying with accreditation regulations. Although these

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programs and regulations may show differences when viewed and compared on a country by country basis, the requirement that faculty possess suitable credentials—including proven scholarship—remains a crucial factor. In the USA, for example, both institutional (regional and national) and programmatic accreditors strongly emphasize the importance of scholarship and even define criteria in their standards to enforce that requirement (ACBSP, 2019; HLC, 2019; WCSUC, 2018).

Another emerging trend in higher education is that every year, more international institutions start what is called a "candidacy process" leading to fully accredited by American and European accreditation standards. As a participant of this process, institutions are expected to abide by the scholarship requirements including endeavors related to diversity. Aside from being an accreditation standard, understanding differences and being more inclusive has potential as an institutional competitive advantage and better prepares their students and faculty to face the challenges of a global marketplace (Holden & Hamblett, 2007).

In the next sections of this chapter, a discussion of the relevance of scholarship and its impact on accreditation is addressed. A short discussion of Boyer's Model—commonly used by universities in the USA and other countries to address scholarship—is also presented. A comprehensive proposal for a pilot scholarship initiative in Latin American and Caribbean business schools aiming to better prepare professionals for Diversity and Inclusion concludes this chapter.

Scholarship and Accreditation

Scholarship has commonly been misunderstood and confused with research, which truthfully is only one of the many forms or subsets of the overall concept of research. Many leaders in the education sector argue that scholarship should only be pursued by students and faculty that are involved with doctoral programs, a belief that is only partially true.

To illustrate, regional accreditation agencies in the USA highlight the importance of scholarship in their standards. More specifically, HLC or the Higher Learning Commission, responsible for the accreditation of higher education institutions located within the middle states of the USA, stipulates in its Policy Book Chapter B: Criteria for Accreditation CRRT.B.10.010 (HLC, 2019), a criterion 3.8.5 that says "The faculty and students contribute to scholarship, creative work, and the discovery

of knowledge to the extent appropriate to their programs and the institution's mission." Another accreditation agency called the Western Association of Schools and Colleges or WASC—an agency associated with the west coast of the USA—states in its Handbook of Accreditation Revised (WSCUC, 2018), a document published by their Senior College and University Commission, has criterion 2.8 that declares "The institution clearly defines expectations for research, scholarship, and creative activity for its students and all categories of faculty. The institution actively values and promotes scholarship, creative activity, and curricular and instructional innovation, and their dissemination appropriate to the institution's purposes and character." This suggests that where appropriate, the institution is expected to include in its policies for faculty promotion and tenure the recognition of scholarship related to teaching, learning, assessment, and co-curricular learning.

Programmatic accreditation bodies in the USA also include specific regulations mandating educational institutions to foster scholarship among faculty members. Consequently, this creates a foundation for preparing and developing professionals capable of dealing with evidence-based approaches, which lead to making a difference in their careers and the way they as professionals mold society and make decisions. To illustrate, the Accreditation Council for Business Schools and Programs—also known as the ACBSP—lists Standard 5, focused on Faculty and Staff, which states the following:

> Criterion 5.3.C. Provide evidence that ALL Faculty members are involved in activities that enhance the depth and scope of their knowledge related to their discipline and instructional effectiveness. The faculty members as a unit must demonstrate balanced participation of scholarly and professional activities. (ACBSP, 2019)

Here, the ACBSP follows the Boyer's Model of scholarship (Boyer, 1990; Boyer, Moser, Ream, & Braxton, 2016) in proclaiming this accreditation standard. In this same criterion 5.3.C., scholarship is defined to include four types of intellectual activity:

- the scholarship of teaching;
- the scholarship of discovery;
- the scholarship of integration; and
- the scholarship of application.

According to this criterion, "these four types of scholarship are to be equally recognized, accepted, and respected, and the overall performance of each faculty member is to be carefully accessed and held to a high standard of excellence" (ACBSP, 2019). The context of these intellectual activities and the Boyer's Model are better explained in the next section of the chapter.

Scholarship and Boyer's Model

In his seminal book, *Scholarship Reconsidered: Priorities of the Professorate*, Ernst L. Boyer (1990) argued that scholarship is not restricted to research, but it can be portrayed in four different forms: discovery, integration, application, and teaching. Faculty members, while performing their duties in academia, are encouraged to exercise all four forms of scholarship as a path to professional growth and institutional advancement. Invariably, different levels of higher education programs will naturally lead to activities that would emphasize one or more of these forms. For example, faculty engaged in doctoral programs would be more involved with research than a professor teaching for institutions that only offers associate degrees. Yet it is essential that faculty and students pursue all four scholarship forms suggested by Boyer as a means of learning, professional growth, and institutional development.

> Scholarship surely means the discovery of knowledge, as in research, but that is only the beginning of the process. Scholarship, to be complete, also means the integration of knowledge. It means the application of knowledge. And it means the presentation of knowledge, as in great teaching. (Boyer, 1992)

Boyer has defined the ***Scholarship of Discovery*** as the one involved with the freedom of inquiry and scholarly investigation. This type of scholarship portrays the main focus of this chapter.

> We take the position that research is at the very heart of academic life, and we celebrate what we call the scholarship of discovery…(And) as long as scholars are free to pursue the truth, wherever it may lead, there will surely continue to be a flow of new scientific knowledge. (Boyer, 1992)

The primary purpose of the scholarship of discovery is to build new knowledge through disciplined, investigative efforts, primarily by employing the scientific method. Here, this type of scholarship goes beyond what is expected solely of doctoral students. The scholarship of discovery as defined here is important to any degree and educational institution, since it contributes to the intellectual climate of the university, characterizes the creative process that helps scholarship to advance, leads to results that can potentially improve the university's academic standing, and increases the respect of their efforts.

Certainly, doctoral-level studies provide the archetypal environment in which the scholarship of discovery is best exercised. The development of dissertations by students and the mentorship performed by qualified faculty, the expected high-quality content, and the rigid rules of formatting exemplifies this type of scholarship. Both faculty and students are engaged not only in the process of innovating within their disciplines, but their review of the literature, results, and suggestions for future research can be shared in different venues, such as peer-reviewed conferences and journals, in presentations, and publishing scholarly articles. Moreover, faculty in higher education organizations have research interests and, in many instances, are funded by the government and other private organizations, to investigate, develop new knowledge, and create theoretical and practical infrastructures that end up as useful applications society in general or at least provide a foundation for future lines of inquiry. In the fields of medicine and technology, much has been gained as a consequence of the scholarship of discovery.

The second type of scholarship defined by Boyer (1990) is the ***Scholarship of Integration***. This form of scholarship is characterized by interpreting the use of knowledge across multiple disciplines. In an information society, it is challenging to separate different fields of knowledge and deal with the boundaries of the human problems of today, since they frequently do not neatly fall within nicely defined disciplines. The scholarship of integration provides a wider lens to the scholarship of discovery or a platform where disciplinary outcomes converge into practical applications, such as the case of institutions that have a practitioner-oriented focus. The value of this form of scholarship resides in making connections across disciplines that magnify these theoretical and outcome developments and, therefore, facilitate the emergence of practical ideas and solutions to everyday challenges.

> We need creative people who go beyond the isolated facts; who make connections across the disciplines; and who help shape a more coherent view of knowledge and a more integrated, more authentic view of life…And in our fragmented academic world, this task of integration becomes urgent every single day. (Boyer, 1992)

The third form of scholarship suggested by Boyer is a ***Scholarship of Application***, also known more commonly as applied research. Here, scholarship focuses on the responsible application of existing and new knowledge to solve specific problems. This type of scholarship epitomizes the bridge between a field of knowledge and corresponding professional pursuits, predominantly the use of scholarly knowledge to aid society and professions in addressing challenges and solving problems. Consulting activities and governance roles in professional organizations are specific examples where faculty members are able to establish credibility and reputation as experts in their fields of knowledge. The scholarship of application also has the potential to provide faculty members with a better practical understanding of what their knowledge can do to help solve problems affecting different sectors of society.

> We need to relate theory and research to the realities of life…I am convinced that university scholars urgently need to respond to the crises of this century… How can we justify a university that is surrounded by pressing human needs and essentially ignores them? It's a failure not only intellectually, but ethically as well. (Boyer, 1992)

Finally, the ***Scholarship of Teaching*** represents the most frequent and traditional form of activity in the academic environment, that of teaching and learning. Its relevance as scholarship, however, cannot be minimized, simply because it is the most prevalent form. It is through the dissemination of current knowledge that individuals realize the need for more investigation and inquiry (discovery), more multidisciplinary approaches (integration), and more practical usage of the theory (application). There is a constant need for studying and improving models that facilitate teaching and learning, so the other forms of scholarship can be nurtured in an environment that benefits both faculty and students.

> Scholarship means not only the ability to discover, integrate, and apply knowledge; it also means to inspire future scholars in the classroom—a process we call the scholarship of teaching. (Boyer, 1992)

Scholarship in Universities—Overview

Scholarship, as indicated above, plays a central role in the educational process for any university aspiring to continually increase its standing. Yet universities are also one of the main breeding grounds of professionals entering into the workforce. To be fully prepared for these tasks while at the same time address the demands of accreditation agencies, institutions are encouraged to involve their faculty and students in scholarship undertakings. In higher levels of education, such as the case of masters and doctoral programs, faculty credentials are expected to include activities such as conference presentations and articles published in peer-reviewed journals. Beyond just preparing and defending a dissertation, doctoral students are also encouraged to perform high-quality research and develop scholarly works (Connor & Shaw, 2008).

An increasing number of educational institutions in many parts of the world have among their student and faculty pools that want to take advantage of online education, in addition to the traditional face-to-face approach. Technology today provides educational institutions with opportunities to enhance the learning process by taking advantage of distance education practices. With this technology, faculty can seek professional development by taking online courses or attending conferences and professional events regardless of their geographical location. The same technology allows universities to develop hybrid approaches to scholarship, offering the services of full-featured scholarship centers that both locally and remotely gather participants with same scholarly interest, while providing them with the resources, guidance, and opportunities to develop their scholarship. One of these technologies enhanced centers, which at the same time responds to workforce needs, institutional development, agency accreditation, and societal demands is a center for Diversity and Inclusion in the workplace.

For the past years, the author has been engaged in forming and operating two Diversity and Inclusion Centers involving more than three hundred researchers and scholars: The Center for Workplace Diversity Research and the Center of Excellence in Diversity and Inclusion. These think tanks dedicated to Diversity and Inclusion in the workplace congregated researchers and practitioners engaged in developing programs and solutions in the various categories, classifications, and social interest groups related to Diversity and Inclusion. In those initiatives, there was also a substantial focus on service to companies and organizations

that embraced or were willing to launch Diversity and Inclusion strategies and development programs among their stakeholders. This connection between academia and the business sector has been the trigger of a broadening interest in seeking opportunities to pursue their scholarship and prospects of their future employability (Carnevale, Smith, & Strohl, 2013; De Meuse & Hostager, 2001; Finch, Hamilton, Baldwin, & Zehner, 2013; Holden & Hamblett, 2007; Wickramasinghe & Perera, 2010).

An Existing Paradigm—A Think Tank in Diversity and Inclusion

The Center of Excellence in Diversity and Inclusion, currently active in the USA, was created in July 2016 by this author who has also been serving as its leader and administrator. The idea was to develop a collaborative environment to foster academic and professional activities related to D&I.

The center has consistently embraced the four types of Boyer's Scholarship (Boyer et al., 2016). Affiliation with the center was welcome not only for scholars from educational institutions, but also to individuals, companies, and organizations who had expressed interest in making Diversity and Inclusion a priority within their respective organizations.

The original Center of Excellence in Diversity and Inclusion was conceived to include not only the traditional categories that result from compliance such as gender, race, and ethnicity, but to embrace a more comprehensive view of Diversity in the Workplace (see Fig. 2.1).

The mission of the center has been to serve and support all aspects of Diversity and Inclusion across the workplace, academia, and society sectors (Charles, 2009; Parry & Urwin, 2011; Stark, Kirk, & Bruhn, 2012; Taylor & Stein, 2014; Willis, 2010). It has been providing resources, education, assessments, research, solutions, and training to businesses and organizations to originate and sustain Diversity and Inclusion (D&I) initiatives, appropriately aligned with the demands from internal and external stakeholders. Along its years of operations, the Center of Excellence in Diversity and Inclusion has fostered scholarship and the advancement of knowledge and understanding of Diversity and Inclusion through exploration, publications, presentations, discourse, and applications.

A crucial academic outcome was achieved in 2018, when researchers of the center published a book on Diversity and Inclusion (Aquino &

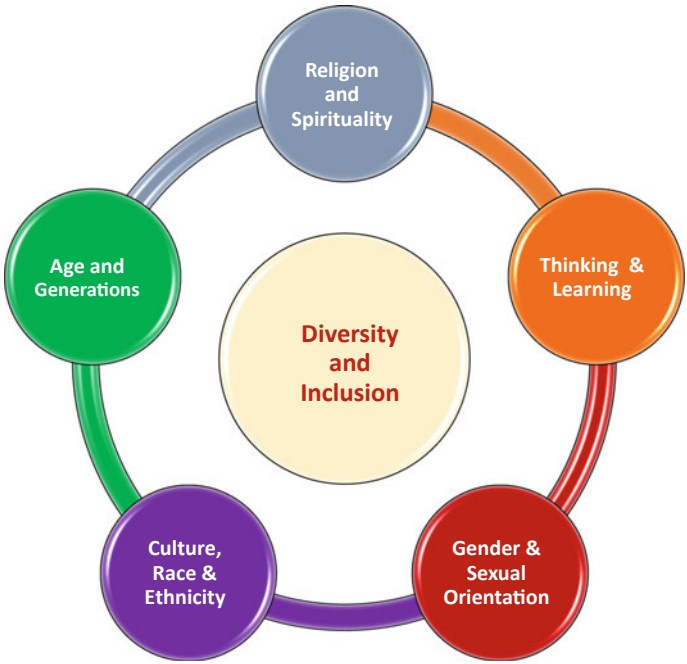

Fig. 2.1 How the center has embraced Diversity and Inclusion (*Source* D&I's dimensions [Aquino, 2017])

Robertson, 2018) titled ***Diversity and Inclusion in the Global Workplace: Aligning Initiatives with Strategic Business Goals.*** The book was divided into two major areas: Diversity and Inclusion in the Workplace—in which different dimensions of diversity were discussed—and Applying D&I in the Workplace, encompassing multiple applications for companies and organizations.

Scholarship in Universities: A Proposal for Latin America and the Caribbean

In 2018, this author and associated researchers expanded the scope of Diversity and Inclusion scholarship to recognize the relevance of specific regional markets to the topic. The geographic area chosen for this pilot was the one encompassing Latin American and Caribbean countries. In

this new research phase, different experiences related to Latin America, the Caribbean and their people are being consolidated into this new book.

The mind-set used in the creation of an American-based think tank devoted to exploring the different dimensions of D&I served as the basis for proposed pilot centers for the Latin American and Caribbean regions. With the acquired experience, the resulting evolving models and programs will capture and acknowledge the differences in culture, ethnicity, business demands, and educational objectives. Overall, the implementation of centers in Latin America and the Caribbean will recognize that wherever differences are discussed and whenever new solutions need to be proposed, Diversity and Inclusion must be embraced across multiple dimensions.

The new centers will keep Boyer's Model (Boyer et al., 2016) as the beacon for their activities, never restricting scholarship in D&I to one type. Research is important and training is crucial, but integration and application have to be at the core of the center's actions. Since its conception, the centers will consistently support and enable companies, organizations, and the community to strategically work on Workforce Skills and Diversity and Inclusion (D&I) initiatives, focusing on both increasing internal stakeholders' performance and external stakeholders' satisfaction and loyalty and connecting the scholarly knowledge from academia to the demands of the market (Fig. 2.2).

The centers will also foster collaboration with companies to perform Diversity and Inclusion diagnostics and create professional development programs that filled gaps between desired workplace goals and their current circumstances. Inspired by the demands from the organizations previously served, this author developed a framework to address D&I in companies and organizations (Aquino & Robertson, 2018), based on 3 phases: diagnostics, gap analysis, and action plan (Fig. 2.3).

A physical location for a center is relevant, but more importantly, there needs to be a virtual option to reach out to those who are unable to attend the center's location. Also, to maximize resources and minimize costs, the pilot center can start with a virtual footprint, beginning with a Web site as a repository of information and expertise in Diversity and Inclusion. Within this Web site—and with the proper technology support—experiences can be easily added, shared, and debated. The use of a Web site has already proved as a successful technique and is a consideration for institutions, agencies, and organizations among different countries that may

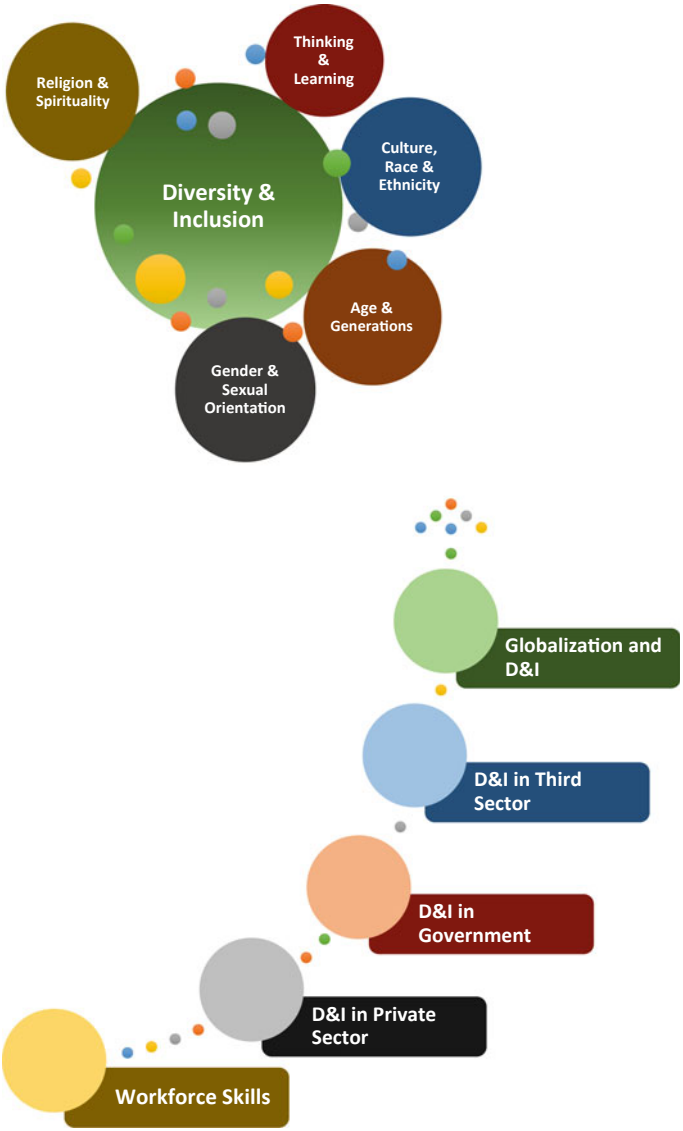

Fig. 2.2 Connecting academia with the market (*Source* D&I management [Aquino, 2018])

Fig. 2.3 D&I framework (*Source* D&I management framework [Aquino, Larson, & Robertson, 2018])

have a shortage of resources to develop an elaborate Diversity and Inclusion project. Here are some suggested elements for those organizations willing to establish a center by means of a Web site:

- Profiles of all individuals (students, faculty, partners) engaged in the scholarship effort,
- Description of all areas of interest and research agenda,
- Scholarship communities and opportunities for funding,
- Repository of scholarly production by members, seminal published works, and training/support materials to enhance the qualification of members and the quality of outcomes,
- Opportunities for sharing scholarship, such as an agenda of call for papers in conferences and journals,
- Communication of outcomes and achievements to academic and professional communities,
- Links to partners and other Web sites that can add value to community members.

Scholarship communities are created to assist in streamlining research and scholarly efforts among affiliates and, at the same time, create clusters of excellence related to layers of depth within the topics being investigated. Under the leadership of one of more members, the scholarship communities should focus on results that can bring benefits to the internal academic community as well to external stakeholders. Those external

stakeholders include organizations and companies that need the outcomes of scholarship to increase performance and become more competitive. The use of blogs and discussion forums inside scholarship communities can help the dissemination of ideas and progress being made in each of the areas of interest, as well as create opportunities for the discovery of new solutions and approaches.

Some of these suggestions have already been initiated in Colombia, where higher education institutions have partnered with the author to start creating a virtual center focused on researching Diversity and Inclusion. Strategically, this center contemplates the possibility of extending its services throughout the Latin American countries. A second initiative is potentially starting in the Bahamas, with its focus on serving the Caribbean region. More initiatives can be started with future partnerships, not only in this region of the world, but also in any country or region of the globe where there are great people that recognize the importance of disseminating knowledge and awareness of Diversity and Inclusion, and are ready to act.

Conclusion

Properly understood scholarship remains a significant component as a performance enhancement for many educational institutions. Its relevance is highlighted and required by many recognized accreditation agencies throughout the worldwide educational sector. Diversity and Inclusion is one of the main areas of concern in the current globalized environment, but action should not be restricted to people and initiatives within the walls of the academic world.

This chapter described a successful path adopted in the USA and that can be adapted and implemented to foster and achieve Diversity and Inclusion scholarship in Latin America and the Caribbean region. Partnerships with the public, private, and third sectors are extremely important in this journey to broadening the understanding and increasing individual and company satisfaction and achievement, via the development and implementation of Diversity and Inclusion practices and solutions among different cultures around the world.

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CHAPTER 3

Cultural Influences of Latin American and Caribbean Perceptions on Inclusion and Diversity

Ronald R. Rojas

Introduction

The Latin America and Caribbean regions remain an appealing market for global competitive expansion (Aguilera, Ciravegna, Cuervo-Cazurra, & Gonzalez-Perez, 2017; Bamrud, 2011). They possess a set of unique conditions that still make it one of the most attractive contexts worldwide for doing business, notwithstanding some severe challenges that underscore these opportunities. Multinationals (Sissell, 2012), services (Rubalcaba, Aboal, & Garda, 2016), and telecommunications (Mayor, Davo, & Martinez, 2015) are among the those that have been successful in establishing a global footprint within these regions despite the argument that Latin America and the Caribbean will never be a developed region because of sociocultural reasons (Bamrud, 2011). Others doing business in Latin America have already met some of these sociocultural challenges, mainly

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related to workplace practices. For example, some of the newer management practices prevalent in North American have achieved some success in Latin America and the Caribbean, but they also show inadequacies (Celaya & Swift, 2006). Among these newer management practices recognized for enhancing operational efficiency, innovation, and global competitiveness are the leveraging of Diversity and Inclusion in the workplace (Cho, Kim, & Mor Barak, 2017). Understandably, a majority of Diversity and Inclusion modeling comes from a North America and European worldview (Rojo & Beauregard, 2017) and is therefore representative of their own cultures. Accounting for cultural nuances in the Latin American workplace is essential (Raineri, 2018), and in doing so, the region has a better chance of fulfilling the expectations of becoming a significant contributor in the evolving global market (Gomes, Robertson, & Dale, 2012).

It is well established in the literature that workplace practices and perceptions of Diversity and Inclusion are shaped by national cultures and subcultures (Peretz, Levi, & Fried, 2015): "If individuals bring different views about diversity to the same workplace, we should not be surprised to find significant variations in their perceptions of the firm's diversity climate" (Hostager & De Muse, 2002, p. 190). Despite the significance of perceptions as a topic within cross-culture studies (Kastanakis & Voyer, 2014), finding related research is daunting (Otaye-Ebede, 2018). For the most part, perceptions are formed by national cultures, and perceptions affect workplace behaviors.

> It is within our (various) cultures that we have practiced and learned how to behave, and what to believe and feel, in accord with prescriptions and proscriptions that were transmitted to us across time from significant others. Cultural influences continue to mold the specifics of development, beginning before birth, influencing subtle and also clear and obvious ways of doing things. (Lott, 2010, p. 13)

More importantly, perceptions have a direct effect on inclusion and diversity behaviors in the workplace (Stoermer, Bader, & Froese, 2016), especially when considering the cognitive-emotional biases related to both social stereotyping and prejudice as "blind spots" within the organization (Raineri, 2018).

Then it is understandable that within the variety of cultural differences even among the Latin American and Caribbean countries, there would

also be multiple perceptions of workplace values, and more specifically, perceptual viewpoints on Diversity and Inclusion (Griffin, Guedhami, Kwok, Li, & Shao, 2017). Any assumption that Hispanics are all defined by a few cultural factors—whether from Central America, South America, Mexico, or the Caribbean—is misguided (Lee, Martin, & Hall, 2017). Although there are shared values among the cultures and subcultures within the Latin American region, there are also significant differences stemming from history, traditions, and social dynamics (Kline, Wade, & Wiarda, 2018). The relevance of perceptual differences in designing and implementing Diversity and Inclusion strategies in the Latin American and Caribbean workplace is the primary objective of this chapter. This chapter builds upon previous research on comparing and relating cultural values affecting race, ethnicity, generational, gender, sexual orientation, religion, disability, social status, and other categories. This chapter also expands the scope of previous research to address all Latin American and Caribbean countries and suggest avenues to explore the influence of cultural perceptions in the workplace further.

Paradigm Shifts from Diversity to Inclusion

A first step in building this chapter's approach to understanding the Latin American perception of inclusion is to provide evidence of inclusion as a distinct construct, different than diversity. Once this distinction is presented, the next step is to address some of the main factors that moderate inclusion, namely, organizational climate and culture, followed by a discussion on the relationship between national cultures and inclusion in organizations. Once these preliminaries are established, then the conversation can turn to the attributes of Latin American cultures and their impact on organizational inclusion and diversity.

In reviewing the literature, there seems to be a shift toward a lessening interest in the traditional forms of diversity management as an obligation to focus on researching the benefits of inclusion as a tenet of organizational advancement (Roberson, 2006). Traditionally, diversity is recognized as "the varied perspectives and approaches to work that members of different groups bring" (Thomas & Ely, 1996, p. 80) and is associated with behavioral or identity differences among groups (Larkey, 1996).

Inclusion reflects the extent to which individuals can access organizational resources and become active participants in organizational decision-making processes (Mor-Barak & Cherin, 1998). Although still interrelated, it is now possible to identify these two constructs as distinct fields of inquiry. On the one hand, the traditional interpretation of diversity is viewed within a "compliance-legitimacy" paradigm, where equal opportunity, fair treatment, and anti-discrimination are topics that characterize the published research. On the other hand, an "enrichment-performance" paradigm is emerging, where research on leveraging employee differences into enhancing organizational performance as a competitive advantage is becoming more evident in the literature. Despite this distinction between constructs, Diversity and Inclusion are so interrelated that one leads to the other: "In the context of the workplace, diversity equals representation. The durableness of diversity is a function of inclusion. Without inclusion, however, the crucial connections that attract diverse talent, encourage their participation, foster innovation, and lead to business growth won't happen" (Sherbin & Rashid, 2017, p. 2).

More specifically, the "compliance-legitimacy" paradigm represents the original diversity viewpoints, which came to the forefront of corporate policies and practices during the 1970s primarily in response to the federal enforcement of equal opportunity employment and affirmative action programs (Kelly & Dobbin, 1998). In many ways, the implementation of these diversity programs represented a hardship for organizations (Rosen & Lovelace, 1991) and it was not until the 1990s that it became a highly debated and researched as an organizational theory topic (Seymen, 2006). Under this paradigm, diversity is seen as an obligation (Demuijnck, 2009), as a crusade to confront discrimination (Hemphill & Haines, 1998), a responsibility to recognize biases (Watts, 1987), and as an added component to the management function (Grant & Kleiner, 1997). Essentially, the "compliance-legitimacy" paradigm forced organizations to evaluate inequities in light of social demands (De Valk, 1993) and compelled them to accommodate this new demand into organizational dynamics.

Undoubtedly, anti-discrimination legislation first compelled changes to internal practices and promoted programs that were primarily measured using hiring and placements data, surveys, and focus group outcomes (Majors & Sinclair, 1994). Over time, businesses began discovering more valuable applications of diversity and started promoting it—even voluntarily—as a measurement of business performance (Jayne &

Dipboye, 2004; Richard, McMillan, Chadwick, & Dwyer, 2003). In some cases, diversity was measured as a perception of performance by employees (Choi & Rainey, 2010) or sometimes by way of a manager's own perceptions (Garib, 2013). In other cases, measurements of diversity effects in organizational performance included using outcomes related to employee tenure (Steffens, Shemla, Wegge, & Diestel, 2014), through the merits of workforce skills (Turnbull, Greenwood, Tworoger, & Golden, 2010), by using correlates between diversity and financial performance (Hassan, Marimuthu, & Kaur Johl, 2015) or by measuring completion of specific diversity goals and objectives (Stutz & Massengale, 1997). Despite these efforts, there were still apparent inconsistencies among empirical findings between diversity initiatives and organizational performance (Ali, Kulik, & Metz, 2011).

Nonetheless, interest in diversity did not remain static along the "compliance-legitimacy" paradigm. Factors such as immigration (Lamphere, Stepick, & Grenier, 1994), globalization (Martin, 2014), disability rights (Ball, Monaco, Schmeling, Schartz, & Blanck, 2005), spirituality in the workplace (Hicks, 2002), religious values at work (Ball & Haque, 2003), sexual orientation (Lubensky, Holland, Wiethoff, & Crosby, 2004), and shifts in public opinion regarding the relevance of workplace diversity (Stockdale & Crosby, 2004) broadened the views on diversity as set the stage for the emergence of inclusion.

There are two noticeable turning points in the literature that support the outgrowth of inclusion from diversity and the formation of separate—albeit related— constructs. When searching the scholarly databases with keywords addressing the "value" of diversity, it is not until about 2001 that the research literature increases substantially, even though it was during the 1990s that diversity became an interest in organizational theory. A second transition point occurred during the same timeframe, where the topic of "performance" further propelled a distinction between Diversity and Inclusion. The same factor that drove scholarly attention to diversity studies—the interest in using "performance" as a measurement of diversity effectiveness— generated momentum into further defining the inclusion construct. Consequently, an "enrichment-performance" paradigm emerged where research on leveraging employee differences into enhancing organizational performance as a competitive advantage became more evident in the literature. Whereas diversity's first drive was primarily aimed

at managing demographics, inclusion emerged as a concept emphasizing employee contributions to organizational development and innovation (Mor-Barak & Cherin, 1998).

What remains uncertain from the literature is evidence of this paradigm shift also taking place in other nations, and more specifically, within the Latin American regions. Whether this shift is a natural progression of just the North American-European view of Diversity and Inclusion, or if the models resulting from this view apply in a broader global sense and readily transferable to other cultures remains unclear. The momentum of inclusion as a value-added and performance enhancer of effectiveness should not overshadow a comprehensive analysis of the adaptability or potential resistance that may be encountered when using these constructs in other countries.

In order to provide a framework for better understanding the possibilities and limitations of applying these concepts to Latin America and the Caribbean, a discussion on how climate and culture moderate organizational values is necessary. Organizations exist within national cultures and understanding the permeability of national values into the climate-culture system of organizations provides insights into recognizing the similarities and differences of Diversity and Inclusion perceptions between the North American and Latin America regional cultures.

The Climate-Culture System

Along with the turning points of "value" and "performance" discussed above, scholars and practitioners also began to focus more on the impact of inclusion on organizational climate and culture, two other concepts already well developed in the management and leadership disciplines. With the climate-culture connection, it became promising to weave the views of Diversity and Inclusion into other research threads. Among the possibilities, the evolving research on how values affect performance within the climate-culture system of an organization offers a path to evaluate the significance of Diversity and Inclusion values as they are portrayed in Latin American cultures.

The fact that climate and culture are critical dimensions of organizational life is widely accepted in the literature (Glisson, 2000). Organizational climate is viewed as the employee's shared perception of with workplace environment (Zacher & Yang, 2016) and is considered a source of employee involvement and empowerment (Ninan, Jose, & John, 2017).

More to the point of this chapter, a climate that is inclusive promotes a shared disposition toward organizational values (Nishii & Rich, 2014), fosters a perception of fairness and trust (Downey, Werff, Thomas, & Plaut, 2015) resulting in performance measurables such as retention and job satisfaction (Brimhall, Lizano, & Barak, 2014), innovation, and process effectiveness (Glisson, 2015). On the other hand, culture refers to an organizational trait that addresses "…the basic assumptions about the world and values that guide life in organizations" (Schneider, Ehrhart, & Macey, 2013, p. 361). Culture provides a shared understanding of the identity of an organization (Ravasi & Schultz, 2006) and is also considered a significant factor in optimizing performance (Boyce, Nieminen, Gillespie, Ryan, & Denison, 2015). In simpler terms, if climate can be associated with the prevalent "mood" within the workplace, then culture refers to the "character" of the organization. Although in different ways, both constructs are associated with organizational performance.

Whether culture affects climate or climate affects culture, it is evident that both result in organizational outcomes through the behaviors, perceptions, and attitudes of employees. What is relevant to this chapter is that both climate and culture are linked to a dynamic web of interpersonal relationships, and these relationships have an impact on the levels of employee commitments (Denison, 1996). Therefore, it is understandable that reducing relational biases and fostering a workplace conducive to fuller use of employee capabilities enhances performance and makes the organization more competitive (Zacher & Yang, 2016). Carefully designed climate-culture systems that thrive on inclusion as a value are more likely to achieve higher possibilities of relational performance to the benefit of the organization.

On an operational-relational spectrum of preferences or styles, the literature already shows Latin American countries with strong interpersonal orientations (Sanchez-Burks, Nisbett, & Ybarra, 2000). If North Americans are considered more "task-than-relationally oriented," then Latin Americans tend to be more "relationally-than-task oriented" (Guerrero & Posthuma, 2014; Ruiz, 2005). Here, a sensitivity toward relational performance activities as a contribution to overall organizational effectiveness is the most common approach to comprehend the effects of the Latin American cultural landscape. Just as organizations have operational performance indicators, they also have relational performance indicators (Moran, 2005). Operational performance refers to the execution of tasks defined by the organization's structure to achieve its tangible goals

(Neely, 2002)—and although they vary for different types of organizations—they are primarily quantitative (Rodriguez, Saiz, & Bas, 2009). In manufacturing, measurements of yield, units per hour, and defects per million would be examples of performance metrics. For healthcare, some operational performance measures include patient wait time, staff to patient ratio, average treatment charge, or medication error rate. In retail, the number of customers, average purchase value, items per purchase, and gross margin are examples of operational performance. Traditionally, financial metrics include the balance sheet, income statement, cash flow statement, and measurements of inventory movements. The common attributes expected from operational performance metrics include easy interpretation, quantitative in nature, address critical business processes, sensitivity to process adjustments, and are relatively easy to collect.

In a similar fashion, relational performance measures also have an impact on organizational effectiveness and are best measured by qualitative means (Ramani & Kumar, 2008; Sun, Aryee, & Law, 2007). Although some relational performance measurements, such as satisfaction surveys, employee turnover rates, complaints, participation in events, absenteeism, are quantifiable, they are just manifestations or consequences of deeper relational dynamics. More difficult interpersonal measurements such as work-family balance, trust, innovation, resilience, adaptability, conflicts in values, tension levels among workers—and of course, Diversity and Inclusion—are relevant to the organization's performance and are harder to assess adequately. The value of relational performance relates to the concept of "guanxi," a Chinese society construct which integrates an organism of relational networks into business activities that complements operational performance (Luo, Huang, & Wang, 2012). In a business setting, the internal relational performance indicators (i.e., soft metrics, human capital metrics) are traditionally the responsibility of the Human Resources function (Wright, Gardner, & Moynihan, 2003).

However, from a cultural perspective, how can this distinction of relational performance be measured? There is an abundance of research to recognize relational performance measurements with customers (Anton & Petouhoff, 2002), yet finding publications that highlight the value of relational vigor within an organization is quite scarce. What little is available in the literature on methods for assessing relational performance are tools such as climate surveys, forming affinity groups, and establishing forms of positional responsibility with the organization's hierarchy that are commissioned to provide a sense of employee interpersonal health. Climate

surveys do carry a "snapshot in time" and seem suitable to measure the inclusion-diversity climate (Herdman & McMillan-Capehart, 2010), but they also carry the classic disadvantages of quantitative research in that collected data is superficial and easy to generalize, there is a reduction of extraneous variables that may be significant, and they are less time-consuming than qualitative approaches (Vogt, 2007). A better technique is that of focus or special interest groups. In forming special interest groups within the organization—such as Employee Resource Groups (ERG)—these informal, affinity-driven, voluntary gatherings easily collect common concerns and experiences related to the workplace and can judge an organization's responses to Diversity and Inclusion strategies (Welbourne & McLaughlin, 2013). Assessing relational performance can also be determined by creating a position within the hierarchy to manage the Diversity and Inclusion responsibility. Although typically this task falls under the Human Resources function (Bierema & D'Abundo, 2004), other possibilities include the public relations functions (Bowen, 2008), diversity officers (Williams & Wade-Golden, 2007) and even corporate chaplains (Meyer & Davis, 2002). Mostly, relational performance metrics such as Diversity and Inclusion as an organizational value are primarily qualitative—and despite the relevance to the organization's vitality—they remain challenging to assess.

The discussion above on relational performance within an organization's climate-culture system although valuable may prove insufficient when investigating Diversity and Inclusion perceptions in Latin America. While the interaction between climate and culture is complex and beyond the intent of this paper, the focus here is to illustrate the impact of interpersonal relationships within a climate-culture system as it relates to the Hispanic values in the US workplace environment and its insufficiency to address Diversity and Inclusion issues at a deeper level when addressing the Latin American countries. An organization's awareness and efforts to sustain the climate-culture values—including Diversity and Inclusion—presume a mature level of cultural competency that maintains organizational performance and promotes competitiveness. And yet definitions and approaches to cultural competency vary widely depending on worldview (Fisher-Borne, Cain, & Martin, 2015) and the abundance of literature on this topic suggests a dominant North American perspective again. Therefore, a comprehensive approach to cultural sensibility in favor of workplace Diversity and Inclusion beyond just the relational orientation is essential if an organization's perceptual awareness is expected to succeed.

The Influence of National Cultures

Discussing the effects of organizational culture and national culture upon each other within the context of Diversity and Inclusion means facing another controversy contained within the scholarly literature. On the one hand, researchers that support Institutional Theory (IT) argue that national cultures have a significant effect on organizational cultures (Kostova, Roth, & Dacin, 2008). Conversely, Organizational Culture (OC) scholars posit that well-defined corporate cultures can minimize many of the national culture effects (Lee & Kramer, 2016). Understandably, organizations that are deliberate in their Diversity and Inclusion values tend to develop cultures that protect against opposing influences of national culture, whereas organizations that hold fragmented or inconsistent Diversity and Inclusion objectives within their organization are more susceptible to the effects of societal values. A possible path to accepting both views is to suggest a continuum, with each one of these positions at the opposite end of the spectrum. Such a model allows for the study of Latin American cultural perspectives on Diversity and Inclusion within organizations, albeit in different degrees. This approach allows room for national cultures to affect organizational cultures and for organizations to act as agents of cultural change within nations.

Having somewhat settled the climate-culture debate and the Institutional Theory (IT)-Organizational Culture (OC) controversies, what follows is an analysis of Latin American and Caribbean cultures and the attributes affecting the perception of Diversity and Inclusion in the workplace. Latin America here is defined as Mexico, Central America, South America, and the Caribbean (Lenartowicz & Johnson, 2003)—and although the list of countries involved suggest a wide variety of cultural and subcultural nuances—the cultural analysis of Latin American countries provided by the dimensions noted by Hofstede (2011) offers a framework that serves the purpose of this chapter.

A widely used method for comparing and analyzing the effects of national cultures is that of Hofstede's cultural dimensions, which examines national cultures along six dimensions, namely, Power Distance, Uncertainty Avoidance, Individualism/Collectivism, Masculinity/Femininity, Long-Term/Short-Term Orientation, and Indulgence/Restraint (Hofstede, 2011). It is important to remember that cultural values, like any human attribute, fall along a continuum and rarely are enacted at the extreme ends of the continuum. The establishment of

a society's cultural patterns is a generality, a broad view of a country's values, and is not intended as a determinant of individual behaviors. It should also be noted that scholars have indicated that some of the findings used by Hofstede may require updates (Bergiel, Bergiel, & Upson, 2012). A brief description of each dimension is presented in the following paragraphs.

The first dimension—Power Distance (PD)—refers to the degree of whether a leader, manager, or supervisor's power is either concentrated in that person or distributed within the organization. If considered as a relational performance indicator, Power Distance describes a climate-culture context that is determined by varying degrees of hierarchical and transactional relationships. A high value of Power Distance means subordinates highly depend on their superiors. Superiors are expected to make all the hard choices, and subordinates will comply rather than challenge the decision. Whereas a low Power Distance value represents a situation where power is more distributed, there is a preference for consultation, and subordinates are comfortable challenging decisions made by the superior. Of all the dimensions of culture, Power Distance (PD) is most directly connected to organizational culture by means of how power is exercised (Fikret, 2000; Hewett, Money, & Sharma, 2006). This means that organizations influenced by high Power Distance cultures, diversity, and inclusion are practically forced—albeit there are kinder ways, such as through paternalistic approaches—to achieve equality and inclusion. For organizations affected by low Power Distance values, Diversity and Inclusion emerge through a mutual interest in achieving optimal performance (Van der Vegt, Van de Vliert, & Huang, 2005).

The Individualism/Collectivism (I/C) dimension represents a continuum where Individualism is defined by self-reliance, personal interests, and individual goals over groups' goals and personal pride from individual accomplishments. Collectivism is associated with interdependence, affiliation, group harmony, and hostility toward out-group members. The Individualism/Collectivism (I/C) dimension directly affects workplace attitudes, pro-social behaviors, and levels of team commitment (Clugston, Howell, & Dorfman, 2000; Ramamoorthy & Flood, 2002). From a relational performance view, Individualism/Collectivism (I/C) within the climate-culture context addresses degrees of interdependence. A high Individualism/Collectivism value reflects a condition where the individualistic person focuses more on himself-herself with minimal interest in others. Interpersonal relationships have value, only within the context of

reinforcing the individualistic view. Consequently, inclusion in the workplace has value if it enhances the individual, thus making it more difficult to associate inclusion with organizational performance as a whole. On the other hand, in a low Individualism/Collectivism condition, people tend to define the self as an interdependent part of a social group rather than independent of others. Collectivistic individuals seek what is best for the group over personal ambitions. The extent of interdependence is relevant since it enhances working relationships and provides a more conducive environment to understand and eventually accept the value of inclusion as an organizational enhancer (Anderson, 2006). However, the collectivistic organization is also subject to in-group out-group tensions that could make Diversity and Inclusion approaches somewhat awkward.

As a third dimension, the Masculinity/Femininity (M/F) dimension expresses another continuum of preferences, this time portrayed by gender roles. Interpreted through a relational lens, the Masculinity/Femininity attribute within the climate-culture context coveys a choice along a task-relationship spectrum, where the masculine cultures are about ego, feminine cultures are about relationships. In a high Masculinity/Femininity (M/F) setting, attributes such as assertiveness, toughness, and focus on material achievement are examples of expected dominant behaviors, whereas a low Masculinity (M/F) setting is associated with cooperation, nurturing, and quality of life. The implications of this dimension for Diversity and Inclusion suggest that masculine influenced organizations are skewed toward promoting men in careers and believing it as an option for women or others. More explicitly in Latin America, a high Masculinity/Femininity orientation may lead to "machismo"—or a sense of male superiority—where organizational Diversity and Inclusion efforts for LGBT, disabled, younger generations, and indeed women are stifled (Segrest, Romero, & Domke-Damonte, 2003).

Uncertainty Avoidance (UA) refers to a measure of a culture's tolerance for ambiguity, uncertainty, and unstructured situations. As a relational performance indicator, Uncertainty Avoidance within the climate-culture context is a function of trust. An organization influenced by high Uncertainty Avoidance values tends to depend on procedures, rules, laws, regulations, and behavioral norms to manage uncomfortable ambiguous situations. Conversely, cases of low Uncertainty Avoidance values display higher levels of trust, allowing affected organizations to comfortably manage ambiguity or navigate through unstructured situations, therefore allowing more opportunities for risk-taking and innovation. Thus, in a

climate-culture context with low Uncertainty Avoidance, trust emerges as a mediating factor that facilitates Diversity and Inclusion through innovation and employee engagement (Doney, Cannon, & Mullen, 1998; Schoorman, Mayer, & Davis, 2007).

A Long-Term/Short-Term (LT/ST) orientation measures the degree to which the "now" is either more or less significant than the "future." As a relational performance indicator, this dimension is an indicator of connectedness with traditions and receptivity to change. Organizations that are influenced by a Long-Term orientation are characterized by persistence, lasting relationships, and a better ability to integrate traditions to change. Whereas a Short-Term influence tends to be normative in their thinking, deeply rooted in customs, and show a preference for quick results that are better aligned with established practices and ritual. An outlook focused on the past sustains stagnation; a positive view of the future is more conducive to acquiring diverse talent. The Long-Term/Short-Term influence within the climate-culture context of an organization positively affects its readiness to accept Diversity and Inclusion as a business strategy (Vallario, 2006).

Finally, Indulgence/Restraint (I/R) is associated with degrees of gratification. High levels of Indulgence/Restraint refer to cultures that are inclined toward enjoying life and having fun, whereas, in low levels of Indulgence/Restraint (I/R), gratification is curtailed. Here, the relational lens is influenced by gratification and where positive emotions are freely expressed. Research is available suggesting that high Indulgence/Restraint influences are conducive to fostering a climate-culture context of Diversity and Inclusion (Stoermer et al., 2016).

Having presented a method of analyzing national cultures along six dimensions, offered a description of each dimension, and discussed some of the potential implications to Diversity and Inclusion, the next step is to obtain dimensional data on Latin American countries and conduct an analysis that would shed light on the perceptions of these countries. Fortunately, Hofstede Insights Web site (https://www.hofstede-insights.com/product/compare-countries/) contains data on many of these dimensions for Mexico, Central America, South America, and the Caribbean, albeit some limitations and cases of incomplete or missing data. What follows is a presentation and analysis of the country data.

Data Analysis and Implications of Cultural Dimensions

In attempting to simplify the analysis, the 29 Latin American countries are grouped into three regions: Central America and Mexico, South America, and the Caribbean. Table 3.1 illustrates specifics values of Power Distance (P/D), Individualism/Collectivism (I/C), Masculine/Feminine (M/F) and Uncertainty Avoidance (UA) for each Latin American country and the averages for each of the Latin American regions compared to the United States (US) and to China (CHN). The data for the Long-Term/Short-Term (LT/ST) and Indulgence/Restraint (I/R) dimensions although relevant to this study are excluded from due to a large amount of missing data.

In collecting the data for Latin America from the Hofstede Insights Web site, it is necessary to make a few overall observations before conducting the analysis and continuing the discussion. First, data on all six dimensions are missing for some countries, like Nicaragua, Bolivia, Paraguay, and the Bahamas. Also noted is incomplete data along all dimensions where Long-Term/Short-Term (LT/ST) and Indulgence/Restraint (I/R) values are available for only 18 of the 29 Latin American countries. Therefore, to minimize the impact of incomplete information, the analysis of the data on Latin American countries will exclude these two dimensions. Note also that data is lacking for most of the entire Caribbean region, except for Puerto Rico and the Dominican Republic. To properly frame the analysis and address Latin American differences in perceptions of inclusion in the workplace, the analysis will focus on the data presented in Table 3.1.

In agreement with published studies, the most significant cultural difference affecting perceptions between the US and Latin American countries is the Individual-Collectivistic (I/C) dimension, where the US has a value of 91 and Latin America shows values below 30, a fact that reinforces the already noted differences in operational-relational preferences of each country discussed earlier. This Latin American preference for relational approaches has a direct bearing on the design and execution of inclusion and diversity initiatives. Holladay and Quiñones (2005) suggest that trainees from collectivistic countries are less receptive toward Diversity and Inclusion training. It seems that employees in high Individualistic-Collective (I/C) influenced organizations tend to have more harmonious alignment with current designs of diversity-inclusion

Table 3.1 Hofstede's cultural dimensions for Latin American countries and regions compared with the US

	P/D	*I/C*	*M/F*	*UA*
United States	40	91	62	46
Central America and Mexico Region				
Costa Rica	35	15	21	86
El Salvador	66	19	40	94
Guatemala	95	6	37	99
Honduras	80	20	40	50
Mexico	81	30	69	82
Nicaragua	**	**	**	**
Panama	95	11	44	86
Averages this region	75	17	42	83
Caribbean Region				
Bahamas	**	**	**	**
Cuba	**	**	**	**
Dominican Republic	65	30	65	45
Haiti	**	**	**	**
Guadalupe	**	**	**	**
Martinique	**	**	**	**
Puerto Rico	68	27	56	38
Saint Barthelemy	**	**	**	**
Saint Martin	**	**	**	**
Averages this region	67	29	61	42
South American Region				
Argentina	49	46	56	86
Bolivia	**	**	**	**
Brazil	67	38	49	76
Chile	63	23	28	86
Colombia	67	13	64	80
Ecuador	78	8	63	67
French Guiana	**	**	**	**
Guyana	**	**	**	**
Paraguay	**	**	**	**
Peru	64	16	42	87
Suriname	85	47	37	92
Uruguay	61	36	38	99
Venezuela	81	12	73	16
Averages this region	68	27	50	83

Note **no data available

Source Compare countries, Hofstede-Insights, https://www.hofstede-insights.com/product/compare-countries/

training, whereas in low Individualistic-Collective (I/C)-oriented organizations the relationship between working beliefs and training is less aligned. A difficulty here arises in the design and delivery of US training programs for Latin American organizations, where the design is typically based upon the US experience (Dussell, 2001) and is further complicated by the differences in training practices (Latham, 1988), although this difference is not as significant when compared with China (CHN). Additionally—at play with more force in Latin American than in the US culture—is the in-group/out-group dynamics, where members within low Individualistic-Collectivistic (I/C) orientations perceive out-group members less favorably (Triandis, 1995). While studying in-group and out-group dynamics between samples from the US and Chile, Peru, Colombia, Venezuela, Fiedler, Hellmann, Dorrough, and Glöckner (2018) saw that Latin Americans showed stronger national in-group favoritism compared to US Americans. In a weak Individualistic-Collectivistic (I/C) setting (i.e., strong collectivistic influences), the in-group and out-group undercurrents create a series of perceptions of inclusion that are less clear in the US setting where many of the training programs are developed. This dimension suggests that recognizing training design and delivery inconsistencies as well as in-group and out-group dynamics are relevant factors when addressing Diversity and Inclusion in Latin America.

The Peace Corps offers an example of managing inclusion in such an environment. Specifically, Peace Corps for Guatemala familiarizes their volunteers with many in-group firmly held perceptions on Diversity and Inclusion, such as gender roles, race, LGBT, disabilities, religion, and age (Joshua-Gojer, Allen, & Huang, 2016).

A second observation affecting the perceptual difference between the US, China, and Latin American countries is Power Distance (PD). Compared with the US, all three regions have higher PD values. The US shows a value of 40 and China shows a value of 80, whereas Mexico and the Central America Region is 75, South America Region is 68, and the Caribbean Region is 67. A high value of Power Distance means subordinates highly depend on their superiors, which suggests that organizations under these conditions are best effective in achieving inclusion and diversity employing hierarchical relationships. Power Distance is the dimension most directly associated with organizational cultures (Hewett et al., 2006), and rather than the organization being influenced by national culture, organizations can serve as agents of social change. Whether by design or by accident, business organizations in many ways have already

been acting as positive change agents (Bies, Bartunek, Fort, & Zald, 2007; Smith, Gonin, & Besharov, 2013). It is not unheard of that businesses—especially US global corporations—institute inclusion and diversity recognizing a role as social change agents (Nishii & Özbilgin, 2007). Remarkably, this is not the case of Chinese global enterprises. In the case of high Power Distance values, Diversity and Inclusion strategies are most effectively implemented as agents of social change. Rather than organizational structures that unilaterally impose Diversity and Inclusion, a paternalistic form of governance has been suggested as an optimal approach (Fikret, 2000).

A third cultural difference affecting perceptions of Latin American countries is the Uncertainty Avoidance (UA) dimension. The value of Uncertainty Avoidance (UA) for the South American region is 83 compared to a 46 for the US and 30 for China (Table 3.1). As pointed out earlier, organizations influenced by high Uncertainty Avoidance values tend to rely more on procedures, rules, laws, regulations, and behavioral norms to manage uncomfortable ambiguous situations. This situation suggests a high dependency on government interventions. Poynter (1982) found that trust and support of national governments in developing countries such as Latin America are essential to business strategies. Within South America—for instance—Uruguay shows the highest Uncertainty Avoidance (UA) value of 99, indicating a very high trust in government. Unsurprisingly, the Economic Commission for Latin America and the Caribbean (2014) notes that among 18 South American countries, Uruguay shows the highest confidence in its government. However, high reliance on government intervention generates nationalism, and nationalism fosters xenophobia, a consideration NMC's face in Latin American countries (Bourgeois III & Boltvinik, 1981). Mostly, high numbers of Uncertainty Avoidance are directly proportional to levels of government reliance, which is a factor to consider when managing Diversity and Inclusion topics in the region, especially within the context of government credibility and skepticism of NMC transplanted programs. Under this dimension, governments play a crucial role in fostering Diversity and Inclusion, a condition favorable to US companies operating in Latin America.

Finally, although the Masculinity/Femininity (M/F) values in Latin America are comparable to the US, they are worth mentioning because of its significant impact on the role perceptions of women. From Table 3.1, the US shows a value of 62 for this dimension of culture, with Mexico

and Central America at 42. In a high Masculinity/Femininity (M/F) setting, assertiveness, toughness, and an obsessive orientation toward tasks over relationships are dominant behaviors, whereas in a low Masculinity (M/F) environment, cooperation, nurturing, and quality of life are dominant interests. The immediate consequence of high M/F values for Diversity and Inclusion is a limited value of women in the workplace. In lower M/F values, feminine attributes appear with more ease resulting in a better climate-culture context for women. To illustrate the point, consider Costa Rica, which has the region's lowest Masculinity/Femininity (M/F) value of all the Latin American countries (Value of 21). Although the gender gap in Costa Rica still exists, the country is fifth in the region, behind Nicaragua, Bolivia, Cuba, and Barbados, according to the 2016 World Economic Forum's Global Report on Gender (WEF, 2016). Costa Rica is recognized throughout Latin America as a leader in sustainability and ecotourism, analogous to the female attributes of collaboration and nurturing (Howitt & Mason, 2018). Nevertheless, it's evident that low Masculinity/Femininity (M/F) numbers are associated with a more favorable climate-culture setting directly affecting Diversity and Inclusion prospects for women in the workplace.

From the Hofstede dimensional data by country, it is also possible to assess the degree to which each Latin American and Caribbean country cultural dimensions compare with other countries. For example, Table 3.1 shows correlation values between each Latin American and Caribbean country—albeit the incomplete data—compared with the US and China. Assuming correlation values serve as a cultural "similarity score," notice that all Latin American and Caribbean countries have a negative correlation value with the US dimensions, showing how dissimilar the dimensional patterns are between countries. This cultural difference serves to support the argument of disparate perceptions of workplace values, more specifically, the values of Diversity and Inclusion. On the other hand, the pattern of similarities with China shows positive correlations in various degrees, with the exception of Costa Rica, Argentina, and Uruguay. Although the dimensional high and low patterns of many Latin American and Caribbean countries better track the Chinese than the US dimensions of culture, other factors affect the comparison and shape potential implications with China. For example, Puerto Rico has a very high correlation with China (0.99), and yet political, legal, religious, and language constraints affect the way perceptions and behaviors are enacted. China's gains throughout Latin America countries are hard to ignore:

> *China scored some notable triumphs in its relations with Latin America and the Caribbean in 2018. First signaled by Trinidad and Tobago in May, countries throughout the region embraced China's flagship global trade and infrastructure programme, the Belt and Road Initiative (BRI). By the end of the year, Bolivia, Antigua, and Barbuda, Guyana, Uruguay, Costa Rica, Venezuela, Chile, and Ecuador had been added to the tally of those signing BRI agreements, along with El Salvador, which was first obliged to shift its diplomatic recognition from Taiwan to the People's Republic. Each new subscriber to the initiative, large or small, was warmly welcomed aboard what Beijing presented as the investment and development project* that would define Latin America's future. (Hilton, January 9, 2019, p. 1)

Notably, China seems to have less interest than the US in managing Diversity and Inclusion in the workplace as a global competitive advantage. So, having dimensional similarities with Latin America may be attractive to China in a different way. It seems China has more interest in competitive outcomes than with innovation and organizational performance, which are the drivers of the US global competitiveness. China's current Latin American interests are in oil supplies, minerals, and agricultural products (Lafargue, 2006) and China's form of financial lending emphasizes nonintervention and imposes fewer oversight restrictions than Western counterparts (Kaplan, 2018). Plus, China has less historical baggage rather than the "imperialistic overtones" associated with the US in Latin America (Rosenfeld, 2015). A non-interventional approach and less of a negative historical footprint may suggest a strategy independent of Diversity and Inclusion efforts.

Nevertheless, the value of these comparisons resides more in the possibility of discovering more profound layers of moderating variables affecting workplace perceptions. Although China's presence represents a boost for economic development, the interventionist approach of Western corporations has a social transformation effect in terms of overcoming biases in the workplace that is hard to ignore. Regardless, the desirability of social transformation in the form of Diversity and Inclusion in the workplace becomes an organizational decision.

When considering the differences in cultural dimensions between the US, China, and the regions of Latin America, it is evident there are some significant differences, and accordingly, a variety of perceptions on race, ethnicity, generational, gender, sexual orientation, religion, disability, social status, and other categories. Based on the higher collectivistic values, the relational over task-oriented approach is a noted difference,

but other cultural influences widen the gap, particularly between the US and Latin American ways of acknowledging inclusion and diversity. Differences in the relationships between working beliefs and training, national in-group favoritism, the credibility and trust in government and the skepticism of outsiders, paternalistic structures, and machismo, all further the point of cultural sensitivity when designing and implementing programs in Latin America. Naturally, other research threads to challenge or validate these observations are necessary. For example, an analysis of external forces in each country (political, economic, social, technical, religious) as well as a country by country search of multinational company successes and challenges in Latin America. An alternative thread is assessing if the widespread use and validation of Hofstede's model in the literature are enough to evaluate the implications of workplace Diversity and Inclusion between countries. Also, relevant is the search and recognition of other sociocultural values beyond Hofstede that may have a more direct relationship with Diversity and Inclusions, such as the cultural subdimensions of religiosity-secularism, affectivity-neutrality, ethnocentrism-xenocentrism, or the degree of social inclusion. These and other possible sub-dimensions of culture may allow the discovery of more definitive indicators of Diversity and Inclusion favorability. Of course, gaps in the Hofstede data impede a more definitive view of the entire Latin American and Caribbean landscape. To some degree, these findings also have implications for understanding the behaviors of Diversity and Inclusion of Latin American workers within the US economy, albeit a topic for another study.

Although the analysis of Hofstede's cultural dimensions for the three Latin American regions has established that Diversity and Inclusion are perceived differently than in North America, an additional step is taken to provide insights into a particular case within Latin America. More specifically, out of all the 29 Latin American countries discussed above, Puerto Rico stands out as a unique case. In looking at the four Hofstede dimensions for Puerto Rico and attempting to find similar Latin American and Caribbean countries within a plus five and minus five range of values, the data shows that Puerto Rico stands alone. This variance begs the question of whether Puerto Rico's perspective on inclusion and diversity is significantly affected by North American culture or its Latin American heritage. What factors make Puerto Rico a particular case and are the perceptions of Diversity and Inclusion more aligned with the North American or the

Latin American view? To address these the question of perceptual differences, a study was designed to compare Diversity and Inclusion perceptions between the US and the Caribbean island of Puerto Rico is presented in the next section.

Puerto Rico's View of Inclusion and Diversity

As a background, it is essential to recognize that Puerto Rico is considered bilingual, has close ties with mainstream American social practices, workplace ethics, and culture, and anyone born in Puerto Rico has US citizenship. There are US Federal offices operating on the island, and the island celebrates US holidays. Puerto Rico's economy is very dependent on US businesses and trade into and out of the island and is controlled by the US Federal government. Yet Puerto Rico—like many Latin American cultures—retains many of the traditions originating from Spain: Spanish is still the primary language, religion has a more profound presence in everyday life, art and music retain a Hispanic flavor, and there are significant traces of African and native Indian (Taino) influences in language and values. Despite the direct influence of North American culture, Puerto Rico shows a significant difference in perceptions on Diversity and Inclusion.

A comparative study between the US and Puerto Rico perceptions of inclusion and diversity from the Rojas and Seda-Cuevas (2018) study were assessed using the Reaction to Diversity Inventory (De Meuse & Hostager, 2001). This tool focuses on five perceived outcomes, categorized as affective, behavioral, cognitive, personal, and organizational. Each of these factors is represented by seven positive words and seven negative words expressing a range of positive and negative responses to workplace diversity. The summary score identifies a participant's overall orientation toward workplace diversity, and as an estimate, is valuable in assessing diversity perceptions as being "pessimistic," "realistic," or "optimistic." The population for this study was analogous to that originally selected for the validation of the RDI in the earlier De Meuse and Hostager (2001) study, namely, undergraduate and graduate business students. A statistical analysis of the scores, comparing those of the US business students in the earlier De Meuse and Hostager (2001) study against those of the Puerto Rico business students, was carried out. An analysis of variance was performed using SPSS software to test for significant differences in the samples at the $p < .05$ level. Statistically significant differences between means

would suggest a significant difference in perceptions of diversity between the two sample populations.

Despite the intensity of US cultural influences, the results of this study note significant differences in perceptions of Diversity and Inclusion between the US sample used in the De Meuse and Hostager (2001) study and an analogous sample from Puerto Rico. These results show that Puerto Rican perceptions of inclusion and diversity are quite different from the US in areas such as accepting the broader meanings of inclusion and diversity (e.g., LGBT, Islam, African American differences), a more apparent separation of what happens at work and at home, and a undercurrent of resistance to changes that may affect Puerto Rico traditions. Other studies analyzing differences in employee perceptions between the US and Puerto Rico are also aligned with and supplement these results (Alvarado-Zayas, 2005; Niedziolek, 2005; Ortiz Rivera, 2010). Again, the argument is that if despite the direct influence of North American values even Puerto Rico demonstrates a significant difference in perceptions on Diversity and Inclusion, then it could be argued that the difference is even more so with the Latin American countries that possess more autonomy and are more distanced from US cultural and economic influences.

After all that has been addressed so far in this chapter, many questions remain. For instance, what can be said about workplace Diversity and Inclusion perceptions of those Latin American and Caribbean countries for which the Hofstede data is incomplete or missing? Which of the Hofstede dimensions of culture best characterizes a country's capacity for accepting Diversity and Inclusion in the workplace, or are there other dimensions to consider? What are contextual variables or guiding principles for designing and implementing Diversity and Inclusion initiatives for Latin America? What kind of management and leadership styles better align with the Latin American perspectives? Is the non-interventionist approach (China) or the US approach (organizations as a social change agent) a factor? Is social inclusion an indicator of workplace inclusion? What are the contributions of governments and higher education institutions in addressing race, ethnicity, generational, gender, sexual orientation, religion, disability, social status, and other categories? What lessons can be derived by analyzing the effects of country culture on those counties with high acceptance of workplace Diversity and Inclusion? I'll attempt to respond to some of these questions in the next section.

Optimizing Diversity and Inclusion for Latin America

Certainly, a relational approach to Diversity and Inclusion is a step in the right direction, but if cultural dimensions frame perceptions and perception is a consideration in formulating a Diversity and Inclusion approach for the workplace, then it is understandable that methodologies framed around US cultural values would face inefficiencies in Latin America. Masculinity/Femininity (M/F) values notwithstanding, Latin America—in general—is at odds with the US along with three of the four dimensions of culture, namely, Power Distance (P/D), Individualism/Collectivism (I/C), and Uncertainty Avoidance (UA). Therefore, it is in the best interest of any national, multinational, or government agency attempting approaches Diversity and Inclusion in the workplace to address worker perceptions along with these cultural experiences. Nevertheless, without a fuller view of Hofstede's cultural dimensions (missing data) and a lack of research pointing to other relevant possibilities beyond Hofstede's dimensions, the exploration of cultural perceptions of workplace Diversity and Inclusion offered here are limited to these four dimensions.

From a management perspective, if high Power Distance (P/D), low Individualistic/Collectivistic (I/C) orientations and High Uncertainty Avoidance (UA) represent the most significant differences been the US and the Latin American cultures as noted in Table 3.1, then it follows that a management and leadership style that best aligns with the corresponding attributes would also correlate with an approach leading to improved organizational performance and key for designing proper inclusion and diversity initiatives. More specifically, if a high Power Distance (P/D) value represents a situation where power is less distributed, then a similar management style that emphasizes deference yet compliance and fosters employee loyalty would be in the best interest of Latin American employees. However, add to this environment a low Individualism/Collectivism (I/C)—or highly collective condition—where individuals seek what is best for the group over personal ambitions. Then an optimal management style also allowing the influence of social views and needs are being nurtured, respective of feelings, and where overall happiness of workers sought, would also be a crucial ingredient. Does such a blend of cultural values as an approach exist in the management and leadership literature?

Fortunately, there is an approach that encompasses these disparate set of attributes. Among the traditionally discussed management styles—namely, autocratic, democratic, and paternalistic (Hodgetts, Luthans, & Doh, 2006)—a paternalistic style for leaders and managers seems best fit for these cultural differences. Pellegrini and Scandura (2008) summarize the essence of paternalistic styles of management and leadership: "Not unlike the father in the family, management is believed to exercise its power within the constraints of protecting and improving the lives of its employees which relives considerable tension on the part of the employees" (Pellegrini & Scandura, 2008, p. 567). This relationship is designed along family roles, where the manager or leader is expected to protect members of the group and help them to grow. Consequently, a paternalistic approach seems a better fit for high Power Distance (P/D) and low Individualism/Collectivism (I/C) environments. This approach—although quite unpopular in North America—provides a benevolent form of hierarchical structure that is more in line with the historical, social, and economic realities of Latin American and Caribbean countries. The literature demonstrates the effectiveness of paternalistic styles in countries such as Chile (Liberman, 2014), Mexico (Martínez, 2003), Nicaragua and Costa Rica (Osland, Snyder, & Hunter, 1998), Brazil (Nery-Kjerfve & McLean, 2015), Colombia (Ostau de Lafont de León, 2011), Bolivia (Kruse, 2001) and even in Puerto Rico (Rodríguez & Gómez, 2015), to mention just a few.

If a paternalistic management approach sounds somewhat condescending, then maybe an Emotional Intelligence (EI) approach to Diversity and Inclusion would seem more palatable. Fundamentally, Goleman and Boyatzis (2017) recognize elements of Emotional Intelligence (EI), such as providing a sense of emotional harmony between the self (self-awareness and self-management) within a social and relational context (teamwork, inspirational leadership). These elements of EI are supportive of the high M/F, low I/C, and high UA values noted throughout Latin America and the Caribbean. Plus, Emotional Intelligence (EI) is also a value cultivated in the North American work environment, is well researched in the literature, and there is an abundance of assessment, practical resources, and trained specialists available. Emotional intelligence consists of five components, namely, self-awareness, self-regulation, motivation, empathy, and social skill (Ahmad, Bangash, & Khan, 2009). If properly managed, the self-awareness, self-regulation components inform the Uncertainty Avoidance dimension by providing structure and norms, and the empathy and

social skill components would serve the low Individualism/Collectivism attributes. Therefore, Emotional Intelligence (EI) is suggested as another possible strategy to help optimize workplace Diversity and Inclusion.

If asked which of the Latin American and Caribbean cultural dimensions could have the most negative impact on Diversity and Inclusion based on the Table 3.1 data, this study would point to the dimension of Power Distance (P/D). Studies show that organizations that have the best records for promoting women outperform their competition on every measure of profitability (Cox, 2017; Johns, 2013). And yet, a High PD climate is associated with gender stereotypes that impede the advancement of females and female values (Désert & Leyens, 2005). As a further aggravation for Latin America, high Masculinity/Femininity (M/F) values tend to discourage feminine values in the workplace further. To demonstrate this argument, Costa Rica has the lowest Power Distance (P/D) and Masculinity/Femininity (M/F) values in Table 3.1 and was recognized by the 2018 World Economic Forum's Global Report on Gender (WEF, 2018) as the second best Latin American country with the smallest gender gap behind Nicaragua (a country for which Hofstede data is lacking). If the Costa Rica case is any indication, workplace climates that manage Power Distance (P/D) and Masculinity/Femininity (M/F) are likely to be more favorable to Diversity and Inclusion. Furthermore, Costa Rica is also taking advantage of the Chinese non-interventionalist approach to global competition. Costa Rica was the first Latin American country to establish direct relations with China, an agreement allowing fuller trade and investments in transportation, energy, and telecommunications (The Tico Times, September 5, 2018). Although there is evidence that multinationals in Latin America have initiated programs for gender equality, such as mentoring groups, home office hours, flextime, maternity and paternity leave, and audits to deal with the "double burden" syndrome—the balancing of domestic and workplace responsibilities—there is still much to be done.

Whether a multinational business opts for an interventionist (US) or non-interventionist (China) strategy as a global competitive advantage, governments and higher education institutions play a significant role in Latin America. Indeed, the workplace effect of high Uncertainty Avoidance (UA) values may be addressed within the organization, but national governments also play a key role in minimizing levels of uncertainty by implementing strict rules, laws, policies, and regulations. For example,

Colombia is recognized as one of the Latin American countries favorable to LGBT workplace equality, where gender identity and same-sex marriage have been legalized, notwithstanding religious and feeble anti-discrimination laws (Out & Equal, 2017). From a higher education perspective, the continuing formation of future professionals with courses, workshops, seminars, and internships is an essential contribution. Another significant impact of higher education in Latin America is for universities and colleges to seek international accreditation, which for the most already emphasizes Diversity and Inclusion, both social and in the workplace. Similarly, national accreditation agencies can contribute by raising their Diversity and Inclusion standards and reporting requirements (Rubaii, 2016). At a deeper level, the question for the Latin American and Caribbean governments is not whether its country prefers economic development or social change originating from the workplace, but how can both approaches in a concerted effort along with higher education and multinational efforts best serve the needs of the country.

In concluding, the values-structure of national culture—either directly or indirectly— has an impact on business operations (Morden, 1995). Perceptions are formed by these same national cultures, and at the same time, they have a direct effect on workplace behaviors (Lott, 2010). Culture and perceptions form attitudes and behaviors that facilitate or hinder workplace practices. Additionally, cognitive-emotional biases related to both social stereotyping and prejudice (Raineri, 2018) also impact Diversity and Inclusion dynamics (Stoermer et al., 2016). In the case of Latin American regions and the Caribbean, practices considering the workplace as family guided by paternalistic management and leadership approaches, an abundance of courtesy and diplomacy, establishing social relationships based upon personal communications and empathy, high regard for teamwork, allowance for the celebration of popular festivities, and recognizing a high dependency on government and social institutions seem better responses to the data provided by Hofstede. Social institutions supportive of Diversity and Inclusion efforts include Business Women's Network, PROSPERA-Latin American Women's fund, Pride@SAP, and the Latin American Network of Non-governmental Organizations of Persons with Disabilities and their Families (RIADIS), to mention just a few. Practices that obstruct Diversity and Inclusion efforts are training programs inconsistent with local values, effects of historical baggage, deep in-group and out-group divides, as well as the prevalence of stereotypes and prejudices.

If anything, more careful research and the practice of Perceptions Management as a component of Diversity and Inclusion approaches are key to successful implementation. Although many of these observations are contrary to the views of workplace practices in the US, they are foundational for promoting Diversity and Inclusion as a global competitive advantage in the Latin American regions and the Caribbean.

Summary and Conclusions

For sure, the literature on global competitiveness is showing a shift of emphasis from diversity as a mandate toward inclusion as an organizational value. Although this shift may not be all that evident in Latin American and the Caribbean, it certainly has created renewed interest in the region. The most common approach to Hispanic values in general—and Diversity and Inclusion in particular—has been an emphasis on a relational over task orientation (Sanchez-Burks et al., 2000). But in dealing with the variety of cultures and subcultures within the Latin American and Caribbean countries, this simplistic approach may prove insufficient, and therefore, discovering more profound layers of moderating variables affecting workplace perceptions in the region is essential to optimizing Diversity and Inclusion.

Throughout this chapter, the author argued that beyond just a relational approach to Diversity and Inclusion, perceptions derived from national cultures within Latin American and Caribbean countries play a significant role in formulating inclusion and diversity strategies. The method used to approach this question consisted of comparing national cultures within the context of Hofstede's cultural dimensions, which analyzes along six dimensions, namely, Power Distance (P/D), Uncertainty Avoidance (UA), Individualism/Collectivism (I/C), Masculinity/Femininity (M/F), Long-Term/Short-Term Orientation (LT/ST), and Indulgence/Restraint (I/R) (Hofstede, 2011). The analysis suggests that the Power Distance (P/D) and the Individual-Collectivistic (I/C) dimension are the most significant cultural tendencies affecting the perceptional difference between the US and Latin American regions. From these data alone, it is evident that Latin American and Caribbean cultures form perceptions in many ways are opposite those of the US and yet with proper perception management techniques they can be harnessed to facilitate workplace Diversity and Inclusion efforts. These differences point to

cultural settings where sensitivity in the design, training, and implementation of workplace Diversity and Inclusion programs are better served when a perception management component is considered.

The Latin American and the Caribbean regions may be an appealing area for global competitive expansion (Aguilera et al., 2017), yet some serious challenges underscore these opportunities. The fact that only four dimensions of culture—or possibly six in some cases—are available to conduct a comparison provides just a glimpse into the effects of Latin American and Caribbean perceptions. Much still needs to be done to better understand the implications of perceptions across race, ethnicity, generational, gender, sexual orientation, religion, disability, social status, and other differences. Business enterprises capable of harnessing these cultural nuances are considerably better poised to capitalize on the competitive advantages these regions have to offer.

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CHAPTER 4

Women Entrepreneurs in Latin America and the Caribbean (LAC): The LAC Difference

Keri L. Heitner

Women's Entrepreneurship in LAC Economies

The Latin America and the Caribbean (LAC) region has the strongest entrepreneurial culture in the world, as evidenced by the opinions of Latin American youth who responded to a Citi Foundation (2015) survey. Almost 90% of the respondents reported entrepreneurial goals of wanting to start and develop a business or be their own boss. In every LAC economy in the Global Entrepreneurship Monitor (GEM) 2018 global survey, women's total entrepreneurial activity was at least half that of men's (Bosma & Kelley, 2019). Of the economies surveyed in GEM 2018, six reflected equal total entrepreneurship activity rates by gender, including Panama. The LAC was one of two regions (the other being East and South Asia) with greater gender equality compared to the other regions. In the 2016/2017 GEM survey, Latin America, along with sub-Saharan

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Africa, had the highest average female rates of total entrepreneurial activity, with high gender parity (Kelley et al., 2017). In five economies in two regions, Latin America (Mexico and Brazil) and Asia, women's total entrepreneurial activity was equal to or higher than that of men. In the LAC, the rate of women starting businesses averaged more than 80% of men's (Kelley et al., 2017).

Twelve economies in the LAC—Argentina, Barbados, Brazil, Chile, Colombia, Ecuador, Guatemala, Mexico, Panama, Peru, Puerto Rico, and Uruguay—participated in the 2015 GEM survey, covering 82% of the LAC population and 88% of the LAC region's GDP (Bartesaghi et al., 2016). In 2015, the level of potential entrepreneurs in the LAC region was 59% (Bartesaghi et al., 2016). Despite Brazil's strong positive social attitudes toward entrepreneurship, the percentage of potential entrepreneurs was just 51%. In 2015, the LAC region was one of three global regions with better indicators of gender parity in total early economic activity involvement than the other regions. In 2015, for every 10 male entrepreneurs, eight female entrepreneurs in these economies were engaged in early-stage entrepreneurial activity (Bartesaghi et al., 2016). Peru was the only LAC country where women reported higher total early stage rates than men. Brazil, Ecuador, and Panama had a promising level of gender parity for early-stage entrepreneurial activity. The largest gender gap was in Uruguay for early-stage entrepreneurial activity (Bartesaghi et al., 2016). Ecuador had the highest entrepreneurship rates for both genders, with 32.8% of working-age women and 34.3% of men starting or running new businesses. In contrast, the lowest total early stage rates for both genders were in Puerto Rico, at 7.1% of women and 10% of men (Bartesaghi et al., 2016). In some countries, such as El Salvador and Brazil, start-up rates approach equity for women and men (Monolova, Brush, Edelman, Robb, & Welter, 2017). In 2013, Caribbean countries had high indicators for total early entrepreneurial activity (nascent and new), with Colombia at 11th globally, Barbados 14th, and Trinidad and Tobago 19th (Varela, Morano, Cardona, & Soler, 2013). Combined, the Caribbean countries had higher total early entrepreneurial activity than other regions. As a group, the Caribbean countries had higher total early entrepreneurial activity than all regions but sub-Saharan Africa.

Table 4.1 depicts gender equality for total early-stage entrepreneurial activity (TEA) in 2018 for LAC economies in the 2018 GEM survey (Bosma & Kelley, 2019).

Table 4.1 Gender equality in LAC economies in 2018

	Female/male TEA ratio		*Female/male opportunity ratio*	
Economy	Value	Rank/48	Value	Rank/48
Argentina	.81	15	.78	44 (T)
Brazil	.93	7	.82	42
Chile	.73	20	.83	40 (T)
Colombia	.72	21 (T)	.95	25
Guatemala	.80	16	.83	40 (T)
Panama	1.01	2 (T)	.99	20 (T)
Peru	.88	10	1.00	15 (T)
Puerto Rico	.55	35	.86	35 (T)
Uruguay	.64	24	.86	35 (T)

Note T indicates tied ranking
Source GEM 2018–2019 (Bosma & Kelley, 2019)

The gender gap in Latin America is narrow for total early entrepreneurship activity, but it widens regarding ownership of established businesses. Comparisons between men and women's early stage and ongoing entrepreneurial activity in 2014 (Singer, Amorós, & Moska Arreola, 2015) revealed greatest disparities in Argentina, Chile, Colombia, Guatemala, Uruguay; with closest gender parity in Bolivia, Brazil, Ecuador, El Salvador. In the 2018 GEM survey, established business ownership among women was second lowest in Latin America, following the Middle East/North Africa region (Bosma & Kelley, 2019).

While North America and Latin America reflect the same rate for female established business ownership, Latin America's total entrepreneurial activity rate for women was 45% higher than North America's (Kelley et al., 2017). Although female start-ups are high in Latin America, few businesses persist to maturity (Kelley et al., 2017). In Latin America, women seem almost as likely as men to start a business but are less likely to sustain their ventures.

Among all regions, discontinuance was second highest in Latin America, exceeded only by sub-Saharan Africa. Unprofitability is a driver (Kelley et al., 2017). In Latin America, most economies show higher startup levels than established business activity. Latin America has the second-highest rate of women entrepreneurs discontinuing their businesses, with

the most common reasons given pertained to profitability or capital, in almost half of the exits reported in the sample (Bosma & Kelley, 2019).

In the Caribbean, the gender disparities vary across the stages of the entrepreneurial pipeline, which extends from sociocultural acceptance to potential entrepreneurs, intentional entrepreneurs, nascent entrepreneurs, new entrepreneurs, established entrepreneurs (Varela et al., 2013). Across the Caribbean economies, the gender disparity for established entrepreneurs exceeded the disparity in the nascent and new entrepreneurs' stage (Varela et al., 2013). Women's entrepreneurship activity in Haiti is informal and not well-organized, which has affected its perceived value (Mauconduit, Emile, & Paul, 2013; Oriza & Paul, 2014). However, their activities are essential to the development of Haiti's social and independent economy (djhaiti, 2019; Oriza & Paul, 2014).

According to the GEM 2016/2017 report, women's entrepreneurship in Latin America is concentrated in the wholesale/retail sector, accounting for almost two thirds of women-owned businesses (Kelley et al., 2017). Low women's entrepreneurial participation in agriculture/mining is at about 30% of men's participation. In Argentina and Panama, almost 5% of women entrepreneurs were in information and communications technology, a rate that exceeds male entrepreneurs. Brazil has high levels of women's entrepreneurship in education, government, health, and social services, with more than 30% of women entrepreneurs starting businesses in these areas, at a rate almost five times that of men (Kelley et al., 2017).

The LAC is primarily a region of independent startups; only Chile and Uruguay report moderate employee entrepreneurial activity (Bosma & Kelley, 2019). Family-based start-ups are high in the LAC region compared to other regions. In the GEM 2019 report (Bosma & Kelley, 2019), Colombia and Uruguay had the most family-based entrepreneurship, at more than 33%. In Colombia and Uruguay, between three and four of 10 early-stage entrepreneurs have family members in co-ownership.

Across all regions, Latin America has the lowest average female growth expectations (17% of TEA), with women's growth expectations at 60% of men's (Kelley et al., 2017). Guatemala, Chile, and Colombia have high total entrepreneurial activity rates and high-growth prospects in terms of job creation. In contrast, solo entrepreneurship is prevalent in Brazil, at 53%; these solo entrepreneurs lack co-founders or employees, and do not projecting any hiring (Bosma & Kelley, 2019).

Overall, the LAC is the least international of the GEM regions. Most countries in the LAC lack international orientation (Bartesaghi et al., 2016; Kelley et al., 2017). International sales are at none or less than 1% in three Latin American countries (Brazil, Guatemala, and Ecuador) (Kelley et al., 2017). The highest levels of internationalization are in Puerto Rico, due to its high level of trade with the USA (Bosma & Kelley, 2019), and in Panama (Bartesaghi et al., 2016).

Latin America reflects high female startup rates for younger women (Bosma & Kelley, 2019). Argentina and Brazil have substantial entrepreneurial activity among women age 25–34, with a drop off by more than 33% after age 34. In contrast, Peru and Belize have high rates among young women that increases by approximately 20% for women age 35–44 and then tapers off. Brazil had a high prevalence of entrepreneurial activities among young adults, 18–24, with a steep drop off for older populations (Bosma & Kelley, 2019).

The differences in entrepreneurship along the pipeline between men and women in the LAC and among the different countries and economies stem from individual, cultural, and systemic challenges and barriers that women entrepreneurs face. The next section focuses on these challenges.

Challenges

The wide gender gap in established business ownership in Latin America contrasts with a narrower gender gap in total early entrepreneurial activity, reflecting challenges for women in the LAC in maintaining and growing a business. Most significant challenges facing women in the LAC are less capital at startup, a hesitancy to borrow money, lower access to networks, gender stereotypes, demands of family and work, fear of failure, lower confidence, low internationalization, and solo operation (Bartesaghi et al., 2016; Chmura, 2016; Ilie, Cardoza, Fernandez, & Tejada, 2018). Women face greater challenges than men in becoming entrepreneurs, including greater domestic responsibilities; gender discrimination, outdated educational systems; lower educational attainment; lack of female role models; fewer networks; lack of capital and assets; lower societal status; and a lack of assertiveness and confidence that stems from cultural factors (Americas Quarterly, 2017; Bartesaghi et al., 2016; Ilie et al., 2018). Women in Latin America report having to overcome society's expectations for women's roles and the assumption that women should work for

others rather than themselves (Jenner, n.d.). These obstacles may deter women from thinking about and engaging in entrepreneurial activities.

Gender differences in five areas—education, experiences, networks, access to capital, and contexts—affect women's entrepreneurial activity (Fredriksson et al., 2014). Total entrepreneurial activity was lower than entrepreneurial intentions every LAC economy reviewed (Bosma & Kelley, 2019). Henry et al.'s (2017) 13-nation comparison revealed that gender-based impediments affect the decision to launch, sector, time invested, capitalization, survival, and longevity of the business. Consequences of gender discrimination in Latin American societies include reductions in women's effective participation in new business development, which in term limits their opportunities to advance professionally (Ilie et al., 2018). It also impedes women's contribution to business development in their countries (Ilie et al., 2018). In Ilie et al.'s (2018) survey of women entrepreneurs in Latin America, most reported having experienced work-related discrimination because of their gender. More than half of the women entrepreneurs surveyed reported widespread inequality in terms of entrepreneurship opportunities, such as access to financial and other resources, business advice, and training (Ilie et al., 2018). Women perceived greater inequality in several areas, including startup opportunities.

Women reported facing more barriers to access financial resources to develop their businesses, which affects their outcomes and growth. The women entrepreneurs surveyed considered the lack of access to capital as the primary reason for failure of women-owned businesses. Women entrepreneurs reported challenges in obtaining financing as the major impediment to continuation (Ilie et al., 2018). Women start their businesses with lower financial capital and lower growth expectations (Terjesen, Bosma, & Stam, 2016). Their challenges to building high-growth companies differ from men's, due to gender barriers encountered at various phases of business development (Ernst & Young & the Kauffman Foundation, 2013). Women in the LAC region face more complex challenges compared to women in more developed countries, including fewer policies and programs to support and encourage entrepreneurial activity, higher regulation, and lower access to credit. Women-owned companies have lower initial financial capital; their financing is less likely to be from formal sources or angel or venture capital investors (Terjesen et al., 2016). They focus less on market reach, competition, and valuation of their enterprise and have lower expectations of growth.

The founders of Mujeres del Pacifico, an initiative described in a later section of the chapter, identified five gaps that prevent women in Latin America from starting and maintaining successful businesses. These gaps fall into the categories of knowledge, access to network, invisibility, disconnection with the ecosystem, and low access to financing (B the change, 2018). According to the World Bank (2018), the law prohibits gender-based discrimination by creditors or access to credit in fewer than one third of the LAC countries listed in Table 4.2. In contrast, in 100% of these countries, women can legally sign a contract, register a business, and open a bank account in the same way as a man.

Despite the challenges described in this section, women entrepreneurs in the LAC region persist in high rates of entrepreneurial activity, succeeding in starting and running their businesses. The next section of the chapter will focus on the characteristics of women in the LAC as drivers of their entrepreneurial activity and entrepreneurial success.

Individual Characteristics of LAC Women Entrepreneurs

LAC women entrepreneurs' characteristics contribute to entrepreneurial startup, evolution, and sustainability (Lopez & Alvarez, 2018; Nassif, Ghobril, & Silva, 2010). About two thirds of people in the LAC region reported positive sociocultural attitudes toward entrepreneurship, with the highest rates in Guatemala (79%) and Brazil (76%). In contrast, Puerto Rico (44%) and Mexico (47%) had the lowest sociocultural acceptance. Puerto Rico's score was the lowest of all countries in the 2015 GEM survey (Bartesaghi et al., 2016). In the Caribbean, 76% of working-age adults had positive sociocultural perceptions about entrepreneurship (Varela et al., 2013).

Drivers of women's entrepreneurship in the LAC include necessity and unemployment. Latin America reflects high necessity motivation. GEM 2018 showed necessity was a high motivator in Guatemala and moderate in Brazil (Bosma & Kelley, 2019). Women in the LAC, except for Colombia and Panama, were significantly more likely to turn toward entrepreneurship out of necessity than opportunity (Bartesaghi et al., 2016).

Women seek ways to earn extra income and cover essential costs such as food, clothing, and school. They are often single mothers. Belize had a decline in necessity-driven motives in 2016; in contrast, in El Salvador,

Table 4.2 Constraints LAC women face when starting and running a business

Economy	*Region*	*The law prohibits discrimination by creditors based on sex or gender or in access to credit*
Antigua and Barbuda	LAC	No
Argentina	LAC	No
Bahamas, The	LAC	No
Barbados	LAC	No
Belize	LAC	No
Bolivia	LAC	Yes
Brazil	LAC	No
Chile	OECD	No
Colombia	LAC	No
Costa Rica	LAC	No
Dominica	LAC	No
Dominican Republic	LAC	Yes
Ecuador	LAC	No
El Salvador	LAC	Yes
Grenada	LAC	No
Guatemala	LAC	No
Guyana	LAC	Yes
Haiti	LAC	No
Honduras	LAC	Yes
Jamaica	LAC	No
Mexico	LAC	Yes
Nicaragua	LAC	Yes
Panama	LAC	No
Paraguay	LAC	Yes
Peru	LAC	Yes
Puerto Rico	LAC	Yes
St. Kitts and Nevis	LAC	No
St. Lucia	LAC	No
St. Vincent and the Grenadines	LAC	No
Suriname	LAC	No
Trinidad and Tobago	LAC	Yes
Uruguay	LAC	No
No		68.75%
Yes		31.25%

Source Statistics from the World Bank (2018)

necessity motives increased (Kelley et al., 2017). The higher levels of entrepreneurship in 2016 may be due to a need to generate income in the lack of other work opportunities (Kelley et al., 2017).

Women are typically more motivated by noneconomic goals (Terjesen et al., 2016). Improvement driven opportunity motives are also drivers in the LAC, especially in Chile. Among entrepreneurs in the Caribbean, motivation by opportunity (57%) exceeds motivation by necessity (13%) (Varela et al., 2013). A study on the motivation of women entrepreneurs in Mexico (Fries, Gonzalez, & Rivera Pescara, 2014) revealed a desire to improve the health and well-being of others, particularly those who need it the most, and collaborating with others to effect change. In contrast to Europe and North America, in most LAC economies, the more prevalent belief is of entrepreneurship as a good career choice, rather than the belief of entrepreneurship as yielding high status (Bosma & Kelley, 2019).

Ilie et al.'s (2018) survey of 342 entrepreneurs from 15 Latin American countries revealed significant differences by gender. Women and men were more likely to hire employees of their same gender. Women were more likely to hold top management positions in women-owned businesses and were more cautious about firm growth (Ilie et al., 2018). Women entrepreneurs are more likely to mentor other women (Brush, de Bruin, & Welter, 2014). In some economies, women entrepreneurs have higher rates of internationalization and innovation compared to men (Kelley et al., 2015).

Latin America has a low fear of failure rate compared to other GEM economies. In every economy Latin American economy, less than one third of opportunity seekers cited fear of failure as an impediment (Bosma & Kelley, 2019). Fear of failure is very low in Caribbean entrepreneurial initiatives (Varela et al., 2013). Women's fear of entrepreneurial failure impedes initial and sustained entrepreneurial activity (Bosma, 2013). Overall, being female, low income, and afraid of failure works against entrepreneurship, whereas skill capability and knowing an entrepreneur have a positive effect on entrepreneurship (Amorós & Mandakovic, 2017). Capability perceptions are highest in sub-Saharan Africa and Latin America, regions with the highest gender ratio (Kelley et al., 2017). While social and cultural norms in the LAC region are positive toward entrepreneurship, they do not foster entrepreneurial risk-taking (Bartesaghi et al., 2016). Jamaica had the highest ratio of intentions to startups in the LAC in 2016 (Bartesaghi et al., 2016).

Ernst & Young and Multilateral Investment Fund (2014) found the following common characteristics of high-growth women entrepreneurs in Argentina, Brazil, Chile, Colombia, Costa Rica, Jamaica, Mexico, Peru, and Uruguay. They were driven by opportunity, not necessity; opportunity-driven women entrepreneurs usually persist long term, thus having a positive effect on the economy through job and wealth creation and innovation. They were 30–39 years of age; had a family history of entrepreneurship; lived with a partner and children; completed college; and relied on support from their partners, friends, and family to manage multiple roles and expectations. They started up in traditional or mature business sectors, relied on their business and technical knowledge for start-up, aimed for growth from the outset and continue to strive for growth, and are majority owners or share ownership with family and friends. The next section focuses on systemic drivers and supports.

Systemic Drivers and Supports of LAC Women Entrepreneurs' Success

Despite the successes of women entrepreneurs in the LAC, gender disparities persist along the entrepreneurial pipeline. The differences between male and female entrepreneurial activity reflect a given society's underlying economic participation and business growth (Terjesen & Elam, 2012). This disparity necessitates action to improve the outlook for women's entrepreneurial orientation at all stages to improve young women's entrepreneurial orientation (Varela et al., 2013). Women face a disadvantage in their access to entrepreneurial roles (Terjesen et al., 2016). Research explaining why there are higher levels of female entrepreneurship in certain countries (Agnete Alsos, Ljunggren, & Hytti, 2013; Jennings & Brush, 2013; Terjesen, Hessels, & Li, 2013) supports the need for systemic responses in the form of policies and programs to foster LAC women's entrepreneurial ambitions. Many of the most successful female entrepreneurs in the LAC region received support from a public or private initiative. [See Sidebar: Private and public sector initiatives and partnerships that foster women's entrepreneurship activity in the LAC region.]

The entrepreneurial ecosystem is the collective and systemic nature of entrepreneurship in which entrepreneurs interact with the external business environment. The entrepreneurial ecosystem consists of a coordinated set of interdependent factors and individual performers that

supports productive entrepreneurship (Stam, 2015, 2018). The unique ecosystem in LAC countries reflects cultural, social, historical, political, and economic factors that affect women's entrepreneurship development and growth (Giménez, Gabaldón, & Seierstad, 2017). To support women's entrepreneurship, the entrepreneurial ecosystem should provide access to improved networking, more diverse funding sources, and government policies that support work-life balance for women entrepreneurs (Amorós & Mandakovic, 2017).

Institutional factors have a major role in women's early entrepreneurial activity (Giménez et al., 2017). Research has shown a positive relationship between startup rates and ecosystem factors of perceived opportunities, role models, knowing entrepreneurs, and confidence in entrepreneurial capabilities (Monolova et al., 2017). A relationship exists between anti-discrimination legislation, economic and family policies and women's startups in LAC countries (Giménez et al., 2017).

Research highlights policy implications at the individual and environmental level regarding LAC women's roles in their family, human capital, and social capital. The implications for female entrepreneurship policy include greater provision of childcare services and generous family leave; addressing discriminatory practices; and initiatives to expand social capital to increase access to mentors, networks, and exposure (Monolova et al., 2017). Women in the LAC need access to higher levels of education, training, and confidence in their entrepreneurial skills. Varela et al. (2013) highlighted the need for more focused support programs to increase women's confidence in their ability across the entrepreneurial pipeline through to established ventures. Women need access to tailored tools, programs, support, and follow-up that support high-growth entrepreneurship to sustain growth of their businesses (International Labour Organization, 2016). Based on work with women entrepreneurs in 11 countries across the globe, the Care and H. M. Foundation (2016) proposed an action framework for empowering women entrepreneurs in three categories: skill and capacity development, at the individual, business, and organizational level; strengthening the visibility, collective voice, and presence of women entrepreneurs; and creating and fostering conditions that enable women's entrepreneurship. Successful women entrepreneurs in Latin America shared their lessons learned about how networking and mentoring, training and accelerator programs, accessing capital, effective use of social media marketing, and confronting social

gender norms facilitated their success (Bons & Tummino, 2017). [See Sidebar: Women's Entrepreneurial Ventures in the LAC region.]

Women who want to start and grow their businesses should build network connections and find a mentor. A strong mentor can be a powerful asset for women entrepreneurs (Bons & Tummino, 2017). They should take advantage of the strategic support available through regional entrepreneurship training and accelerator programs, which can also facilitate access to funding to grow the business (Bons & Tummino, 2017). Entrepreneurship training can support access to capital and more effective marketing through social media. Combatting gender stereotypes common in Latin American countries is also critical to success. Developing an entrepreneurial mindset at an early age through exposure to education and role models will help to increase the number of startups by women and support women's movement across the entrepreneurial pipeline (Jenner, n.d.).

Gender policies must address women's entrepreneurial preferences, societal expectations and norms around women's roles, and institutional supports (Henry et al., 2017). Governmental science, technology, and innovation policies in emerging economies should support new firms (Lopez & Alvarez, 2018). Policies should eliminate discriminatory processes for women, such as constraints on women's property rights, such as requiring a male co-signer on a loan (Terjesen & Elam, 2012). Caribbean women in particular need policies that improve entrepreneurship education, support women across the entrepreneurial pipeline, build internal support mechanisms, develop programs to address limitations faced, expand the entrepreneurial culture, expand financial support, and improve regulations (Varela et al., 2013).

The drop off between nascent and new entrepreneurs in the LAC region reflects a need for improvements in the support system to achieve a higher conversion rate between nascent and new entrepreneurs in areas such as financing, coaching, sales and marketing, managerial and legal information, and increased orientation toward opportunity-based entrepreneurship (Bartesaghi et al., 2016). The key areas in need of informed policies to support entrepreneurship are entrepreneurial finance; government policies; education; institutional, political and social context; and access to information. Incubators stimulate access to resources (Castro, Galán, & Bravo, 2014), which in turn supports business development and growth.

Goltz, Buche, and Pathak (2015) found a positive association between women's nascent activity, political empowerment, and rule of law. Women in political positions on the local, regional, state, and national levels can reduce or eliminate cultural and institutional barriers to entrepreneurship, and advance policies promoting women's entrepreneurial participation and achievement. A legal and regulatory structure under rule of law protects women's business activities, which is particularly important in regions where the informal culture does not support entrepreneurship. Goltz et al. also found that rule of law moderated the relationship between political empowerment and nascent entrepreneurship rates.

Conclusion

Despite the obstacles they face, women entrepreneurs in LAC countries are achieving greater gender parity than in other parts of the world. The LAC region has the strongest entrepreneurial culture in the world, with greater gender parity than most other regions in terms of startup and total early entrepreneurial activity. The high start-up rate for younger women drops off for older women. The gender gap widens regarding ownership of established businesses. Although female start-ups are high, few persist to maturity, often due to a lack of profitability or capital. Growth expectations and internationalization are low.

The differences in entrepreneurship along the pipeline between men and women in the LAC and among the different countries and economies stem from individual, cultural, and systemic challenges and barriers that women entrepreneurs face. Gender differences in five areas—education, experiences, networks, access to capital, and contexts—affect women's entrepreneurial activity. Women face greater challenges than men in becoming entrepreneurs, which may deter them from thinking about and engaging in entrepreneurial activities. Gender discrimination reduces participation in new business development. Women face fewer policies and programs to support and encourage entrepreneurial activity, higher regulation, and lower access to credit. Despite the challenges, women entrepreneurs in the LAC region persist in high rates of entrepreneurial activity.

LAC women entrepreneurs' characteristics that contribute to entrepreneurial startup, evolution, and sustainability include positive sociocultural attitudes toward entrepreneurship and motivation from necessity and unemployment. Women seek ways to earn extra income and

cover essential costs for their families. They are often single mothers. They have a desire to improve the health and well-being of others, working collaboratively. LAC women are less afraid of failure than women in other regions and have higher perceptions of their skill capability.

Individual characteristics are not enough to foster success. The entrepreneurial ecosystem must also support and empower women's entrepreneurship with access to training, mentors, funding, accelerators, and networking. Informed policies to support entrepreneurship include entrepreneurial finance; government policies; education; institutional, political, and social context; and access to information. Government policies should address discrimination and support the unique demands that women entrepreneurs face given their role in the family. Policies should eliminate discriminatory processes for women. Public and private sector initiatives are an essential component in supporting women's startup and entrepreneurial success in the LAC region.

Sidebar: Examples of Initiatives and Partnerships Fostering Women's Entrepreneurship Activity in the LAC Region

THE S FACTORY OF START-UP CHILE: The S Factory is Start-Up Chile's pre-acceleration program for women's technology-related start-ups (Chilean Economic Development Agency, 2014). The S Factory provides participants with start-up training, equity-free funding, and Former Chilean President Sebastian Piñera (2010–2014), himself a successful entrepreneur, provided incentives for entrepreneurship, such as Start-Up Chile, a public accelerator for high-potential entrepreneurs. Start-up Chile is one of the world's most successful incubator programs and the leading accelerator in Latin America. (https://www.startupchile.org/programs/the-s-factory/)

LABORATORIA: Laboratoria (n.d.), a women-owned Peruvian initiative, provides free training to low-income women in Latin American to learn how to code so that they can access good jobs in the technology field as developers and designers. Laboratoria offers bootcamps in Lima, Peru; Santiago, Chile; Mexico City and Guadalajara, Mexico; and Sao Paulo, Brazil. More than 1000 women have completed the program, with an employment rate in the technology field exceeding 80%. (laboratoria.la)

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MUJERES DEL PACIFICO: Eight women founded Mujeres del Pacífico (n.d.) in 2013 after receiving funding to travel to multiple countries to learn about entrepreneurship. The mission of the organization is to develop and promote women's entrepreneurship in Latin America by addressing five identified gaps pertaining to knowledge, networks, visibility, connection with the ecosystem, and financing. To alleviate these gaps, Mujeres del Pacific, the largest community of women entrepreneurs in Latin America, provides outreach, materials, training, and support. They developed content, training, support, and outreach around these gaps to mobilize female entrepreneurs in the region, in person and online. La Gira Emprendedora is an event for Latin American women entrepreneurs to meet, learn, and connect, guided by las Mujeres del Pacifico, la Universidad del Pacífico, and la Asociación de Emprendedores de Perú. Participants experience a day full of networking, activities, discussions, and other events designed to unleash their entrepreneurial potential. (https://home.mujeresdelpacifico.org/nosotras)

WOMEN'S ENTREPRENEURSHIP IN The AMERICAS (WE AMERICAS): WE Americas Accelerator is a 3-year program of the Thunderbird School of Global Management (n.d.) and the US Department of State designed to help advance women-owned businesses in Central America. Cohorts of women entrepreneurs whose efforts have the most potential for positive cultural, social, and personal impact participate in business and management courses delivered in Spanish. They receive mentoring, go on site visits, and stipends to support local networking and training to support market expansion. The program includes a capstone event connecting entrepreneurs to potential funders. (https://thunderbird.asu.edu/WEAmericas)

WEXCHANGE: WeXchange offers women entrepreneurs in Latin America and the Caribbean opportunities for networking, connecting with investors and mentors, and participating in a pitch competition. (http://www.wexchange.co/en/aboutus)

Sidebar: Examples of Women's Ventures

PERU: Martha Sócola Morales of Peru, founder and operator of a stationery store, built on her prior experience selling beauty products and typing papers for other students while a university student to finance her education (Purdy, 2019). To address a gap in the market, she developed a business plan to grow the stationery business from a home-based printing and typing service to a store that provided stationery goods, photocopying, and other services and obtained training in business management from Care's Women in Enterprise program (Care & H. M. Foundation, 2017). Obtaining funding was a challenge due to her husband's outstanding debt, which financial institutions considered when assessing her application, but Morales was able to access a funding stream designed as a low-interest group loan for women that does not require any collateral or guarantee (Purdy, 2019). The women make biweekly payments. In the small Peruvian village of Caccaccollo, 60 women entrepreneurs belong to a coop focused on traditional weaving of handcrafted goods they sell to tourists and locals to support their community (Huspeni, 2018). Their earnings help to support children's education, roads, and livestock.

PUERTO RICO: CEO Dolmarie Mendez and COO Lauren Cascio are the award-winning co-founders of AbartysHealth (2019), a Puerto Rican health-technology startup. Mendez and Cascio made Forbes' "30 under 30" in health care rankings and the Caribbean Business "40 under 40" list (Jenner, n.d.). AbartysHealth offers a patient-provider data delivery system with a unique centralized data hub to support medical record portability and universal patient identification. They raised almost $1.5 million in funding to support expansion across Latin America. (abartyshealth.com)

BRAZIL: Leila Velez founded Beleza Natural before the age of 20. In 2005, Beleza Natural joined the Endeavor Institute (Endeavor Insight, 2018) to help foster its growth. The company, which began in 1993 as one salon in Rio de Janeiro, has more than 3000 employees (Americas Quarterly, 2017; Bintrim & Bons, 2017; Instituto Beleza Natural, 2018), and has expanded to the USA. Velez offers employees, most of whom are in their first job, opportunities for education, professional development, and advancement. Americas Quarterly (2017) named Velez one of the top five entrepreneurs in Latin America. (https://www.belezanatural.com/about.html)

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COLOMBIA: Founded by Jimena Flórez, Chaak (n.d) develops healthy snacks to improve the health outlook of US children, while contributing to the social and economic well-being of Colombian farmers through empowerment and sustainability practices (New American Economy, 2017). To realize her desire to develop agricultural sustainability programs for rural farmers in Colombia, Flórez met with representatives of businesses, government, and schools (Krygier, 2017). Hired by a Bogotá university, and with funding from the Colombian Ministry of Education, Flórez developed the curriculum for a program on sustainable farming techniques directed toward young farmers. To demonstrate the potential of sustainable farming techniques to bring food from farm to table, Flórez and a childhood friend created a social enterprise, originally called Crispy Fruits, which became a national venture in 2012. Lower than desired profitability spurred innovation to launch into the US market with products to address childhood obesity under the brand Chaak Healthy Snacks and help Colombian farmers to expand their market reach. Flórez participated in the WE Americas initiative, which helped place her with an incubator, the Rutgers Food Innovation Center, to launch her US venture. In 2015, then US President Barack Obama recognized Flórez at a Global Entrepreneurship Event for her contribution to her community. Americas Quarterly (2017) named Flórez one of the top five entrepreneurs in Latin America. (http://chaaksnacks.com/about-us)

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CHAPTER 5

Workforce Diversity in Ports: The Global and the LAC Perspectives

Michael C. Ircha and Stéphane Morency

Introduction

North American ports typically function as "landlords" where the port authority owns the infrastructure (wharves, roadways, utilities, and warehouses) and leases waterfront land to private terminal operators (supplying mobile cargo-handling equipment and cranes). Recruiting, training,

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and dispatching port workers lie in the hands of private employer associations, such as the terminal operator or the MEA. In the past, and in some cases presently, port workers were hired for shifts on a casual basis, depending on the cargo-handling work required. In other ports, often those providing a guaranteed annual income, port workers are dispatched to various shifts on a rotating basis to spread available work equitably.

As port reform continues in Latin and Central America and the Caribbean, more and more ports are shifting to the "landlord" model. As in the North American context, this shift means individual private terminal operators have enhanced abilities to recruit and train their port workers. Increasingly, this includes females. For example, David Penedo from Honduras' Puerto Cortes states: "The port environment has changed, today it is a labor option for women. Here we value and respect everyone equally. Women in Operadora Portuaria Centroamericana (OPC) have found an organization of which they are an important part" (OPC, 2018).

The port industry is unique. The demand for cargo-handling work reflects the often-irregular pattern of shipping leading to uncertain casual employment. Dock work has historically been described as: "Hard, dirty, unpleasant and dangerous … the awkwardness and variability of working conditions with the desire to make the job pay, has led to almost constant bargaining on the job" (Adams, 1971). In the past, the insecurity of casual port workers resulted in fierce resistance to introducing new, more efficient cargo-handling mechanization, such as containerization. Today's port workers evolved from a long-standing tradition of hard physical work, difficult management-labor relations and an emphasis on job security (Ircha & Garey, 1992).

The dramatic containerization revolution in the late twentieth century led to the need for technically skilled port workers, early retirement for many older employees, and changes in working conditions, including the provision of guaranteed annual incomes to offset some of the vagaries of shipping (Levinson, 2008). Unlike in the past, today's port workers need technical and computing skills to handle increasingly sophisticated, digitally based cargo-handling equipment and mechanized systems. Shifting from yesterday's hard physical labor where male muscle-power dominated to today's more sophisticated mechanized terminal operations opens opportunities for less "brawn" and more "brain" power. This means women are no longer restricted to handling administrative chores in ports but are now able to apply their skills and abilities in all sectors of port operations.

Attracting women to work in Caribbean ports is particularly challenging. Despite the crucial importance of the maritime sector to these island nations, women only form a small percentage of port workers. As pointed out by Claudia Grant and Vivette Grant, "Because of their essential contributions to household welfare, women are the key to poverty reduction in developing countries." This is particularly relevant as female-headed households amount to as much as 50% of households in the Caribbean (Grant & Grant, 2015). Thus, it is essential that women be empowered to contribute in all sectors of the economy, including ports and shipping. Similar challenges occur in other Latin and Central American countries where the "inclusion of women in port work represents a great advance and greater opportunities for them because it diversifies their knowledge, experience and increases their income" (OPC, 2018).

Recognizing the importance of women in developing country economies led the International Maritime Organizations' (IMO) Women in Development program (WID) to encourage the integration of women in the maritime sector. The WID improved access to training and employment, increased women in senior management, and promoted female economic self-reliance. It emphasized capacity building and provided gender-specific post-graduate fellowships at the World Maritime University in Malmö, Sweden and the International Maritime Law Institute in Malta. By 2014, more than 650 women had received WID sponsored degrees from these institutions, including over 100 from the Caribbean (Grant & Grant, 2015). Since its establishment in 1983, the World Maritime University graduated 4919 students, of which 1029 were women (21%) (WMU, 2019). The United Nations is focused on gender equity. As former UN Secretary General Kofi Annan claimed, "gender equality is more than a goal in itself. It is a precondition for meeting the challenge of reducing poverty, promoting sustainable development, and building good governance" (IMO, 2013).

This chapter examines the growing role of women in modern ports and the challenges they face in recruitment and retention, along with steps to enhance their port-related employment opportunities. The chapter begins with a discussion of the challenges facing women in male-dominated occupations, including ports. This is followed by a review of the approach taken by the MEA to diversify their ports' workforces. The chapter concludes with a discussion of the steps needed to further attract women into the ports industry in general, and in Latin America and the Caribbean in particular.

Challenges Women Face in Working in Ports

For millennia, women have been barred from entering many occupations. These male-dominated activities reflect traditional societal mores and ancient legal codes restricting women's activities and rights. For example, in the Roman era, the male head of the household held *pater potestas*—the power of life and death over all family members (Rodgers, 2012). Effectively, women belonged to the male head of the household and were "transferred" from father to husband on marriage. Despite this constraint, as pointed out by Mary Beard, "Roman women in general had much greater independence than women in most parts of the classical Greek or Near Eastern world, limited as it must seem in modern terms" (Beard, 2015).

These ancient restrictions against women in many occupations underlie modern myths about women working in masculine environments. Henry Etzkowitz, Kemelgor, and Uzzi suggest, "The sexual separation of labor, the association of certain occupational specialties with one gender or the other strongly persists in most societies" (Etzkowitz et al., 2000). In fact, before the modern era, male-dominated occupations were seen as physical, hard and dangerous and deemed inappropriate for "respectable" women (Bix, 2006).

Male dominance in the ports sector reflects a long tradition of hard and demanding labor that involved lifting and carrying heavy goods from ship to shore to warehouse. The work was difficult, dangerous, and demanding. One learned on the job, requiring a strong camaraderie among workers. Obviously, in this physically demanding male world, there was little room for women.

Women in Ports

Today, technology and mechanization have reduced many of the challenging physical requirements of port work. However, long-ingrained attitudes have not necessarily changed. As pointed out in *Lloyd's List*, "… there is nothing special about ships and shipping [and ports] which should make it male-dominated, except habit" (*Lloyd's List*, 2008). Caroline Arias, a bulk supervisor in Chile's Puerto Coronel argues: "The port area is often represented as hostile and distant to women, since historically

it has been managed by men. However, the social and cultural transformations of recent years have had their echo in ports, incorporating – even gradually – women in their ranks" (Siebert, 2019).

Ports and the maritime sector need to welcome women into their organizations. Recently, the European Sea Ports Organization (ESPO) participated in the launch of a "Women in Transport" web portal "to improve the working conditions for women in the transport sector and to change the culture" (ESPO, 2017). This step reflects the IMO's WID approach in partnering with the International Association of Women in Maritime Transport and Trade (WISTA International). WISTA's mission "is to attract and support women, at the management level, in maritime, commercial and logistics sectors" (IMO, 2019).

Women are considered an underutilized source of labor for ports, yet also representing part of the solution for meeting anticipated skilled labor shortages in the maritime sector. Further, considerable anecdotal evidence describes the benefits of women working in ports. As Jan Horeck points out, recruitment advertising for some automobile terminals reflects a preference for women applicants as "women are considered to be more careful and obey the rules and drive and park the cars with upmost [*sic*] accuracy which is very important when handling vehicles onboard and in terminals" (Horeck, 2008). Others echoed this perception of women as careful equipment operators. A port trainer in Hamburg claimed females are more careful drivers leading to fewer accidents and lower maintenance requirements (Arlt, 2011). Similarly, the Port of Montréal's maintenance staff appreciate the care female drivers take with their equipment (Morency, 2017). An employer of women seafarers noted, "They're more alert. I hate to say they're more intelligent because I don't make intelligence tests with them [but] they're more engaged you know" (Thomas, 2004).

Similar to other male-dominated occupational sectors, the percentage of women currently working in ports is relatively small. The MEA currently has about 10% women among its Montréal port workers with less representation in its other, smaller ports. However, in the past year, women accounted for 27% of Montréal's 75 new hires. The British Columbia Maritime Employers Association (BCMEA) employing all port workers on Canada's West Coast has about a seven percent female cohort. On the East Coast, the Halifax Employers Association (HEA) has six percent female port workers (Lazarus, 2017).

Beyond Canada, other ports fare better in their ability to recruit and retain women port workers. The Port of Hamburg has about 15% women. In its recent recruitment in Hamburg, women accounted for 26% of the 97 new employees (HHLA, 2018). In the Port of Valencia, female workers comprise 14%. Swedish terminals have seven to ten percent female port workers. In New York/New Jersey's 2015 recruitment drive, 51% were military veterans of whom 20% were female. This recruitment resulted in New York/New Jersey terminals having nine percent female port workers (Bedard, Morency, Daoust, & Ircha, 2015).

In Latin and Central America and the Caribbean, ports are quickly matching—and in some cases exceeding—developed country ports in their inclusion of women. For example, the Dominican Port Authority boasts of having the highest percentage of women employees of all Latin and Central American and Caribbean ports, with 42% women working in port operations and administration (DPA, 2018). The Panama Canal Authority follows with 25% female participation in all aspects of the Canal expansion (Prieto, 2014). Mullaje Central terminal in San Antonio Chile has 20% of women in many port roles (Siebert, 2019). In Panama, the Manzanillo International Terminal has increased the proportion of women in port operations to 15% (Prieto, 2014). The Port of Buenos Aires, in Argentina, has seven percent of women workers in the Rio de la Plata terminals (Potocar, 2017).

Women continue to make inroads to seaports around the world. In early 2018, media headlines declared, "Women finally break gender barrier at Algeciras port: Europe's last port with no female stevedores hires its first women." The port claimed several women passed the hiring exam for some 460 stevedoring jobs, while the press reported 25–65 women were successful (*Costa News*, 2018). In a similar vein, last year, Argentina's Puerto Rosario celebrated the arrival of its first seven female stevedores (Puerto Rosario, 2018), while recently, Ecuador's Puerto Posorja welcomed the country's first three female port equipment operators (Murillo, 2019).

Barriers to Women in Ports

If women are beneficial for ports, then why are so few of them work in the ports sector? Such under-representation is common among other masculine occupations. For example, an earlier study of women firefighters in the USA found they represented 3.7% of the workforce when they should

comprise at least 17% (Hulett, Bendick, Thomas, & Moccio, 2008; Griffith, Schulz, Wakeham, & Schultz, 2016). Many barriers or obstacles are making port employment unattractive to women including union seniority rules, gender stereotyping, ports' masculine culture and image, work-life balance challenges, credibility gaps, ineffective recruitment, orientation and training, lack of female facilities, and inappropriate safety gear. Some of these barriers are even more prominent in the Latin American and Caribbean ports, magnified by cultural values and historical precedents. These barriers once identified and addressed make the port working environment more appealing for women.

Port Union Seniority

Port labor unions traditionally use seniority for member progress through hierarchical job categories. Typically, this means recruits are assigned to the lowest and often most physically demanding tasks. In ports, recruits usually spend several years as basic labor serving as "lashers." In container terminals, lashing involves manually installing long (2.5–5 m), heavy (up to 24 kg) bars to cross-stabilize containers onboard ships to prevent their movement at sea. Depending on the terminal, lashing can also involve wrestling heavy chains and winches to tie down trailers on roll-on-roll-off vessels, tying large bulk bags to spreaders, lifting and connecting large pipes to transfer liquids to and from ships, opening and closing ship hatches, cleaning holds, and lifting and securing various cargo—all physically demanding tasks.

However, it is illogical to require port workers to serve an apprenticeship as a lasher before being trained and deployed as an equipment operator. Lashing has no clear connection to operating modern cargo-handling equipment. Thus, there is a clear need to shift from traditional seniority to a merit system based on demonstrated skills and aptitude. Recruitment and training should focus on different categories of port workers, from lashers to equipment operators to computer specialists. Differentiating new port worker recruits for specified categories would allow capable and skilled men and women to add more value to terminal operations beyond basic lashing labor.

Although the concept of replacing seniority with skills and abilities as a means to place recruits, as radical as it sounds, it is not without precedent. Several years ago, the Port of Auckland (POAL) in New Zealand evaluated its recruitment process to determine why so few women worked in the port. They found that port workers were required to serve five to

eight years as a "lasher" before becoming eligible for promotion to a straddle carrier driver and subsequently a crane driver. "We looked at it from the view of did you have to be a lasher to be a good straddle driver? The answer is clearly no. One involves brute strength, the other driving skills. We started looking at recruiting based on skill rather than longevity and hiring people directly as straddle and crane drivers." Eighteen months after changing their recruitment practices, POAL employed 23 women. The Port found women's "performance was often better than the males and their health and safety record was better." They seemed to have natural aptitudes around height perception and counter swing required for crane operations (Felixstowe Docker, 2014). The Port's General Manager of People, Systems, and Technology, Diane Edwards claimed:

> Women instantly made an impact at the front line. They started to outdo men in productivity figures, sometimes as much as 14%. They were more committed, safer and faster. As more women joined the workforce it was proved that this was not a fluke. It was not because they had more skill – the difference was down to attitude. Reluctant to be 'beaten by a woman' we then saw productivity figures also begin to rise among the men with a consequent rise in overall productivity. (MacIntyre, 2017)

Will American and Caribbean ports move toward more modern, merit, and aptitude-based recruitment? Doing so challenges current collective agreements. Other industrial sectors have modernized their labor-management relations by replacing seniority with merit-based progression—yet it remains unclear if port workers' labor unions and maritime employers will follow.

Gender Stereotyping

Both ancient and traditional views of suitable occupations for women and men continue to plague many cultures and societies. Julie Prescott and Jan Bogg argue, "social-psychological factors contribute to gender segregation in male-dominated occupations" (Prescott & Bogg, 2013). These factors include the belief in one's abilities and competencies, anticipated roles, and fit within occupations. Parents, media, school, and other social factors are often the main influences for young people in their career choices. Often, this leads girls to underestimate their abilities in math and sciences while encouraging boys to overestimate them (Frize, 2009). Similarly—in the maritime sector—research has found that female maritime

officers underrating their leadership skills while their male counterparts overrated theirs (Delgado Ortega, Øvergård, & Henden, 2014). Thus, a lack of self-esteem may deter women from seeking employment in male-dominated ports.

Guacolda Vargas, Development and Sustainability Manager at Chile's Puerto de Talcahuano, argues that women workers themselves must have security and confidence in their abilities. She further suggests: "one of the challenges of women in the port sector is to achieve visibility… this requires having confidence and confidence in our ability to analyze and make decisions" (Siebert, 2019).

Furthermore, if parents and school officials only have a vague notion of employment activities in the ports sector, they will not likely encourage women to seek such occupations. In a major British container terminal, human resource officials indicated they had few female applicants from the surrounding community, as local women in this seaside town perceived they had no role in the port. The terminal's female recruits usually came from other non-maritime communities (Bedard et al., 2015). For example, Chile's Consuelo Canaves suggests that the ports' challenge "is how we can generate more women to join the different roles of the ports' operations" (Siebert, 2019).

Ports' Masculine Image

Ports tend to reflect a masculine dominated culture, which can deter female participation. The traditional ports' image of brute strength, challenging outdoor weather, and foul language prevails in many cases. Given this culture, women may perceive ports as hostile environments reflecting potential sexual harassment, lewd jokes, sexist language, and poor intergender behaviors. Judy Wajcman notes, "[ports] have a masculine image, not only because they are dominated by men but because they incorporate symbols, metaphors and values that have male connotations" (Wajcman, 2007). Such symbols and metaphors as the "feminization" of ships and male-oriented language can discourage women from working in ports.

Research has shown that female engineers in male-dominated environments often adopt coping mechanisms such as acting like "one of the boys", accepting gender discrimination as part of the job, and adopting an "anti-women" approach (Prescott & Bogg, 2013). Similar coping mechanisms are likely found in ports where women are a significant minority. However, changing the workplace environment can happen by increasing the presence of women. For example, one terminal operator suggested,

"…the presence of women … actively improves the morale and atmosphere, promoting a more 'normal' environment for the crew…. The whole language changes to the positive… there is 'please' all of a sudden, even between the male community, everything changes" (Thomas, 2004). The MEA, like other port employers such as Argentina's Puerto Rosario, is increasingly recruiting women partly as a means of improving the port's work culture (Puerto Rosario, 2018).

Work-Life Balance

Shift work in ports creates a work-life balance challenge for both men and women workers. As an example of this challenge, the Port of Montréal requires port workers to be available for assignment to shifts 19 days out of 21 workdays. Within the 19 days, they could be dispatched to an eight-hour shift any time of the day or night. Besides, they may be required to be available for shifts in two out of three weekends. Yet, as Susibel Perigault, Manzanillo International Terminal's Training Manager points out, working 24/7 is not difficult. Nurses and doctors can schedule day and night shifts, as do port workers (Prieto, 2014).

Work-life balance can be challenging for women as they often have an additional burden with family responsibilities. Men may work longer hours, as they often have fewer domestic and caring responsibilities. For women, however, putting in longer hours and also spending energies to adapt to the male work climate can suffer higher stress levels, impacting their health and well-being (Prescott & Bogg, 2013). Women who are both career and family-oriented tend to be disadvantaged since avoiding overtime and extra work can be interpreted as being less committed.

Flexibility in scheduling shifts is a significant incentive when attracting women to port jobs. Coupled with the challenge of working longer hours is the need of many women for work schedule flexibility to accommodate family responsibilities. Limited scheduling flexibility and a lack of adequate child (and elderly) care facilities at the workplace can discourage women from working in ports. As a result, some ports use new personnel management technology to provide shift scheduling flexibility over several month's time frame. Female workers also require separate locker room facilities. Furthermore, the lack of proper sanitary facilities, particularly in older terminals, can be a significant aggravation for women port workers.

Credibility

Gaining respect and credibility in the workplace is a challenge for women in male-dominated environments. C. M. Dominguez suggests, "it is not the women's inabilities that prevent their advancement, but rather their male managers or peers' inabilities to deal with someone who is different and may not fit their paradigm" (Dominguez, 1992). Masculine organizations are often based on hierarchical, top-down authority in which a perceived "glass ceiling" prevents women's contributions from being taken seriously and excludes them from informal networks (e.g., the "old boys" club). Addressing this challenge requires "a personal and visible commitment from the men leading these companies … they need to ensure female talent pipelines are created and be prepared to mentor women" (Adamson, 2018). Increasing women in ports at all levels will serve as a learning process to overcome this inherent bias. As pointed out by Brandy Christian, chief executive at the Port of New Orleans, it is becoming common for women to hold maritime leadership positions. "As more women join the industry, gain experience, rise in their professions, and succeed in the C-suite and director levels, gender as a barrier to leadership simply evaporates. Currently, females lead 11 of the American Association of Port Authorities member ports and that number is only going to go up" (MacIntyre, 2017).

Recruiting Challenges

Recruiting women in ports is challenging as the "entry testing criteria" may be subtly skewed toward male candidates. Recruiting for physically demanding occupations often includes physical strength testing in which women are less likely to succeed than men, a phenomenon not limited to the port workplace. For example, in the 1990s, women were eligible to be firefighters in many countries, yet in Ottawa Canada, none were serving. As pointed out by a city councilor "the way we did it at the time is you have to go through all the training and all of the hurdles and you would get a pass-fail. When we were hiring, though, we would call people based on rank." In effect, women met the standards and could be gifted leaders, communicators and problem-solvers, but never were interviewed as men ranked ahead of them in the physical tests. This same city councilor claimed, "They realized that the tests had a bias built into them, towards men" (Reevely, 2018). A similar study reported in *The National Report Study on Women in Firefighting* found the pass rate for women was about half that of men (Hulett et al., 2008).

Although many cities now have female firefighters, the challenge of recruiting more females remains a factor with law enforcement services. For example, the Province of Ontario tests candidates for municipal policing. Unfortunately, at a time when Ottawa's police force is trying to diversify to reflect better the community it serves, many female candidates failed the physical test. About eighty percent of men pass the test compared to 45% of the women. Ottawa's Police Chief claims he and other police chiefs were seeking to identify "any systemic barriers that exist in the process" (Payne, 2018). Essentially, a key issue for ports is whether physical testing remains valid, reliable, and reflects the actual requirements for the different types of jobs.

A Case Study: Recruiting Women for Canadian Ports—MEA

Traditionally, port worker recruitment has been in the hands of longshoremen unions. Union dominated recruitment stems back to the early days of stevedoring and dock labor when it was difficult to find workers willing to endure the challenges of dock work and uncertainty of casual labor. Until recently, this was the case in the Port of Montréal where the port's longshoremen union submitted a list of potential candidates for recruitment to the MEA. The MEA put the proposed candidates through a battery of tests, including dexterity, visual acuity, and physical strength. On passing the tests, candidates were interviewed before being assigned as occasional workers in a reserve pool. Gaining seniority in the reserve pool by working numerous shifts could eventually lead to more permanent status as a union member and a recipient of the MEA's guaranteed annual income.

As federally regulated employers, Canada Port Authorities (CPA) and other maritime employers are required to comply with relevant government labor regulations, including the *Employment Equity Act*. Compliance requires suitable representation within the port's workforce of four designated groups: women, Aboriginal peoples, people with disabilities, and visible minorities. In the past, the longshoremen unions submitted candidate lists that included predominantly white, male relatives, and friends. This traditional approach of union candidate recruitment meant Canadian ports were unable to comply with the Act's requirements. However, in the case of people with disabilities, ports often have a reasonable proportion in their workforce, since union workers injured on the job are provided with reasonable accommodation for continued employment.

As port traffic grew in 2005, the MEA sought to increase the Port of Montréal workforce. They requested a list of suitable candidates from the longshoremen union. However, the submitted list lacked sufficient women and other minority groups. The MEA rejected the initial and subsequent candidate lists, as they did not include members of designated groups. This rejection resulted in a union complaint of unfair labor practices to the Canada Industrial Relations Board (CIRB). The longshoremen union argued that the MEA's selection criteria are far too severe and that the union's approach was not discriminatory, and its members could refer whomever they want, be it friends, neighbors, acquaintances, or family members. The CIRB ruled that for every ten candidates, positions nine and ten had to be designated and retained for women and visible minorities, respectively (CIRB, 2005).

In 2013, the MEA successfully negotiated with the longshoremen union to upgrade the basic requirements for port worker candidates to include high school graduation and a driver's license. Also, the union agreed for the first time in its history to advertise for candidates in major local newspapers (MEA, 2014).

The Canadian Human Rights Commission (CHRC) audited the MEA in 2008 to determine the port's compliance with the *Employment Equity Act*. This audit led to the development of the MEA's plan to hire targeted numbers of port workers to ensure representation from each of the four designated groups.

In 2014, the MEA requested 100 candidates from the union of which there was to be 25% female and 25% Aboriginals and visible minorities. The submitted candidate lists again did not provide these percentages, and as previously, the MEA rejected them over several rounds. The MEA then advertised for occasional port workers in the local media. Although occasional port workers in the reserve pool were outside the collective agreement, the longshoremen union took considerable exception to this step and challenged the MEA's actions to the CIRB.

As a result, the CHRC again audited the MEA and found their employment equity success rates had improved. However, the CHRC believed that further efforts were needed to reflect the representation of designated groups with respect to their availability in the labor market. Table 5.1 shows the percentages and numbers of designated categories of port workers in Montréal in 2013 and 2017.

Based on labor market availability for the designated groups, in 2014, the CHRC set the following targets for the MEA: 21% female; 0.7%

Table 5.1 MEA employment equity (percentages and number of workers)

Designated group	*2013*	*2017*				
	Montréal (%)	*Montréal (%)*	*% 2013–2017*	*Trois-Rivières/Bécancour (%)*	*Hamilton (%)*	*Toronto (%)*
Females	5.9 (68)	10 (117)	72	3.7 (3)	0	4 (1)
Aboriginals	0.5 (6)	0.3 (4)	−33	0	3.4 (2)	0
Visible Min.	3.5 (40)	4.8 (57)	43	0	0	0
Disabled	2.9 (40)	2.5 (30)	−25	0	0	0

Source Human Resources, Maritime Employers Association, Montreal (2017)

Aboriginals; 5.5% persons with disabilities; and 20% visible minorities (Dufresne, 2014).

The longshoremen union's CIRB complaint resulted in both parties achieving an understanding of complying with Canada's *Employment Equity Act*, including seeking to meet targets for women, Aboriginals and visible minorities as set out in the 2014 CHRC letter of commitment. The MEA and union agreed to split the nominations to candidate lists evenly. The MEA would seek to have 25% female and 25% Aboriginals and visible minorities on their candidates list while the union would attempt to provide 20% female and 20% visible minorities in their list (MEA, 2015).

In its other smaller ports, Trois-Rivières/Bécancour, Toronto, and Hamilton, the MEA directly recruits port workers and seeks candidates from the various minority group categories to achieve employment equity.

The MEA's 2014 employment equity plan included working with the longshoremen union to set favorable policies and practices to correct the under-representation of designated groups among the port workers. Also, the MEA took steps to improve the port's image as an attractive working environment for women and other designated groups with a positive public relations campaign, including a widely distributed promotional video and other media materials (Maritime Employers Association, 2018). Further, the MEA safeguarded the accommodations of women and other designated groups in the port by ensuring they were equipped with appropriately sized security and safety gear, locker rooms, and other facilities. In older terminals, walls were installed to divide locker rooms. In newer terminals, separate facilities were designed and built to accommodate the needs of all workers. Similar employment equity compliance steps were

taken by the MEA in its other, smaller ports of Trois-Rivières/Bécancour, Toronto, and Hamilton.

As shown in Table 5.1, by 2017, the MEA succeeded in increasing females working in the Port of Montréal by 72% and the percentage of minorities by 43%. The MEA hired 75 port workers, including 20 women and three persons with declared minority status. Continued recruitment of women and minorities will enable the MEA and the longshoremen union to get closer to the employment equity targets set by the CHRC.

This case illustrates many of the challenges and opportunities that ports in Latin America and the Caribbean may need to face. Compliance steps instituted by government agencies will likely require changes in workplace practices, as discussed in this case. Recruits need to be selected based on skills and aptitude to handle increasingly sophisticated cargo-handling equipment rather than on their ability to undertake heavy lashing and cargo-handling tasks. Moving toward merit-based recruitment policies stands as an effective means to increase the attractiveness of port work for females and minorities.

Making Ports Appealing for Women

Addressing Gender Equity

Gender equity can be defined as "a 'social order' in which men and women share the same opportunities and the same constraints on full participation in both the economic and the domestic realm" (Baylin, 2006). As an example, which represents the reality in many countries, the Canadian government protects women from discrimination by gender, age, and marital status through the *Canadian Human Rights Act* of 1977 and the *Canadian Charter of Rights and Freedoms* of 1982. Further, Canada handles the equality rights of women under the *Employment Equity Act* of 1995 and the *Public Sector Equitable Compensation Act* of 2009.

As federally regulated employers, CPAs and other maritime employers are subject to federal policies and regulations on workplace diversity and gender equity. However, despite the regulatory enforcement, attracting women into Canada's overall workforce has already had a significant impact on GDP per capita. A recent report shows that female employment contributed 33% to Canada's real GDP per capita. The government's success in attracting women into the public sector is readily apparent;

by 2016, women comprised 55.1% of the federal public service compared to 45.6% in 1990 (Payne & Laucius, 2018).

Addressing gender equity benefits the ports, their tenants, and stakeholders. By treating women equitably and providing better job opportunities, the port enhances its reputation for fairness—a significant positive feature in the business community. Gender equity increases the chances of hiring the best by increasing the size of the candidate pool—vital in today's increasingly limited, skilled employee market. Equity also improves opportunities for innovations. Women and other minority groups provide diverse points of view reflecting their different experiences and interests, all of which increase the ability of the port and its terminals to innovate and find smart solutions to challenges (Valian, 2006).

Achieving equity in Latin America and the Caribbean requires each port to examine its policies and programs to identify gender-related "blind spots." In many cases, dominant masculine cultures (e.g., machismo) need to evolve into a more open, transparent, and equitable values. Such transformation begins at the top with a strong and visible commitment by the port and terminal's top management—as was the case in the Port of Montréal and Port of Auckland as discussed above. Similar progressive steps are being taken in Latin and Central American and Caribbean ports. For example, Victor Gomez Casanova, Executive Director of the Dominican Port Authority, has "stressed the need to strengthen the role of women within the maritime port sector, particularly because it is an essentially masculine context and with macho standards and trends" (DPA, 2018).

Appropriate gender equality policies and procedures are required for implementation and compliance throughout the port. Human resource procedures are encouraged to reflect transparency, objectivity, and task-oriented in order to overcome gender stereotyping, favoritism, and biases. There is also a need for policies of zero tolerance of harassment to address unacceptable behaviors in the workplace. Appropriate staff training is paramount to support the ports' cultural change. In particular, first-level supervisors require special training to support their day-to-day interaction with port workers. Organizational cultural change takes time. Ports, terminals, and stakeholders have to persevere to make the port attractive workplaces for women and other minority groups.

Family-Friendly Ports

A critical factor in attracting women to the port workplace in Latin America and the Caribbean is changing the ports' image from a masculine to a family-friendly work ethic by recognizing the relevance of family work-life balance for everyone. Family-friendly policies such as fair hiring and promotion practices, networking and mentoring support, ensuring work-life balance, and accommodating childcare needs make ports appealing workplaces for women and other potential recruits.

Recruitment and Training

Without question, the outdoor and physical nature of port work attracts certain types of candidates. Therefore, recruitment strategies should target gyms, active sports players, high schools, and colleges, as places where women who might be interested in applying for port work are more likely to be found. Personal relationships are also important in convincing women to apply for port work. Ports can consider engaging their own employees, retirees, and stakeholders to recruit females and other minority groups (Hulett et al., 2008).

Yet port recruitment policies and procedures must also be examined for latent gender bias, such as unnecessary a high physical strength requirement where it is truly not required, as in the case of equipment operators. Notably, the firefighting sector provides prior training for women candidates so they can build strength before the formal strength tests, therefore improving their success rate. As an example of this approach, "In Milwaukee, where recruits receive 14 weeks' training prior to the exam, females' strength increased an average of 21% and fitness by 29%, and by the end of training, the females combined size, strength, and fitness averaged 96% of their male counterparts" (Hulett et al., 2008).

It may be true that most ports do not have the same lengthy training regime found in the firefighting sector. Thus, they are unable to offer extensive physical training prior to testing. However, the maritime industry could establish suitable training programs for men and women candidates at nearby fitness centers to allow them to build their strength and fitness prior to the port's candidate testing program. The objective is to ensure candidates have and maintain minimum strength standards consistent with the job requirements.

The port's orientation programs and ongoing training curriculum need to be evaluated for potential gender biases. These programs strive to make

candidates feel welcome and create a sense of belonging. Initial orientation should include a discussion of the possible challenges women and other minorities may face in port work and provide them with information on best practices in developing social and interpersonal coping strategies.

Networking

Women in male-dominated organizations often feel isolated and seek camaraderie with other females. Ports should encourage networking opportunities among women and, indeed, among men and other groups to generate mutual support and reduce any sense of isolation and not belonging. The MEA, for instance, set up a female committee within its Health and Safety Committee structure to provide a support network for women port workers. Latin American and Caribbean ports could also benefit from establishing similar networking groups.

In the Caribbean, maritime women have formed a Women in Maritime Association, Caribbean (WiMA) with the support of the IMO's Integration of Women in the Maritime Sector. WiMAs have been established around the world in 152 countries, including Latin and Central America and the Caribbean. WiMA's mission is to foster the development and participation of women in the maritime sector (IMO, 2019).

Mentoring

Coupled with networking is the need to encourage informal mentoring among female port workers—learning "the ropes" in how to succeed in their new and complex working environment. Mentoring goes beyond training to provide insights and ongoing support through the early stages of adapting to the port community, especially having the capability of women mentors. Research has found that mentors have positive influences on their mentees. They tend to be more confident and committed, resulting in a higher retention rate and better career and job satisfaction (Prescott & Bogg, 2013).

Work-Life Balance

Work-life balance is relevant to both men and women port workers, and an essential element for a healthy work-life balance is workload flexibility. In the ports sector, this implies having choices in shift allocation. In interviews with European and American container terminals, senior managers discussed establishing personalized schedules for port workers reflecting family and other needs. With proper technology and programming for

scheduling and dispatching, the concept of personalized shifts becomes easier to contemplate.

Personalized scheduling over a quarterly basis (in a fair and equitable manner) would be beneficial in recruiting women port workers. In a similar manner, such personalized scheduling can address the concerns of younger port workers, who also seek more flexibility in their work routine (Ircha, 2012). The Port of Auckland has instituted flexible working hours for shift workers with the goal of making the Port "a more friendly workplace for parents with young families" (Felixstowe Docker, 2014).

Some ports already provide shift flexibility through their dispatch methods that serve as examples for others. On Canada's West Coast, the BCMEA uses a lottery system to dispatch port workers from a hiring hall. Port jobs are assigned by seniority and depend on demand. A benefit of having to appear at the hiring hall physically is flexibility. As one Vancouver female port worker put it, "Because we work out of a hall, we have the freedom of not going to work; we can work when we want" (Lazarus, 2017). Yet in ports with a guaranteed annual income program and its requirement of assigned shifts, flexibility in scheduling is more challenging.

Work-life balance is also a health and safety concern. The MEA studies found that many port employers try to assist work-life balance by regulating the amount of overtime available for each employee. Besides improving their family life, managing overtime leads to improved concentration during equipment operations and fewer accidents (Bedard et al., 2015).

Child and Elderly Care Services

Women and men often have two critical caring phases in their lifetimes: child-rearing and dealing with elderly parents and relatives. It is hard to balance a port's shift requirements with family caring concerns. Here, ports need to seriously consider the benefits of ensuring female and male port workers have access to suitable child and elderly care facilities. If possible, these facilities should be available 24/7, reflecting the port's shift work requirements. However, due diligence is required before establishing a facility. For example, when Loto-Québec established a 24-hour childcare service, they found parents reluctant to leave their children in the facility overnight. They preferred to have their children cared for by a family member. Thus, a limited day and evening child and elderly care service may be more suitable for ports. In another example, recently, Argentina's Puerto Valparaiso took on the challenge of seeking legal support to

establish nurseries in the port to help integrate working mothers (Puerto Valparaiso, 2016).

Regardless, providing suitable accommodation for port workers' family needs is the key to making the port environment more appealing to women, minorities, and a broader base of potential employees.

Harassment Policies

Women and other minority groups also face harassment in masculine working environments. In many governments, including many of those in Latin America and the Caribbean, employers by law must have harassment prevention policies and investigation procedures to comply with the local labor laws. Such employer policies and procedures must be fair, ensure they do not victimize the complainant and provide suitable checks and balances to validate complaints and accusations. Of particular interest here are methodologies where valid harassment complaints can go beyond the place of employment, in case the place of employment is unresponsive to the law.

Enhancing the Port's Image

Taking clear and tangible steps to establish seaports as a family-friendly, safe, and appealing for women are necessary changes in attracting female port workers. In the Port of Auckland case, Diane Edwards claimed the steps they took to change the culture paid off with record port profits: "I think we've established a culture where we reward for good ideas, encourage participation and reward good work; a culture where people want to achieve" (Felixstowe Docker, 2014).

Ports need to address their previous "brute force" image by:

- hosting school class visits to see modern cargo-handling operations,
- establishing community-port days to encourage public visits to port facilities as being done annually at the Port of Montréal and many other Canadian ports,
- developing and distributing videos and other public relations media to educate the public on modern port operations and their importance to the country's economic and trade development, and
- monitoring and using social media to boost the port's image.

Conclusion

It is essential that ports throughout Latin America and the Caribbean take a proactive stance in recruiting women and other minority groups to ensure diversity in their work environment. Such recruitment broadens the pool of potential candidates for port work, ensuring the best and the brightest are selected. Many other countries have already noted the benefits of attracting women and other minorities by reducing overt sexism, harassment, and poor working relations as well as by improving equipment operations, including reduced accidents and maintenance requirements, and searching for new ideas and innovative solutions to port and terminal challenges.

Achieving a renewed, modern ports culture requires concrete steps from the top down in ports and terminals. Appropriate policies and procedures need to be in place along with suitable training for all port employees, and in particular, first-level supervisors. Many ports have sought to attract female and minority candidates for port positions. However, further steps may be needed to achieve higher levels of female and minority group representation within this traditionally masculine work environment.

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CHAPTER 6

Case Studies on the Effects of Toxic Leadership on Diversity and Inclusion in the Workplace Within the Latin American and Caribbean Regions

Felix Santiago

Introduction

To what degree are career executives or managers—in general—willing to tolerate bad, harmful, or toxic leadership styles? Do mid-level leaders or corporate executives develop an individual rationale for tolerating the influence of a toxic leader despite personal harm or damage to the workplace climate? Are followers more or less susceptible to a leader's toxicity in a diverse and inclusive work environment? Are executives prone to tolerate leader toxicity due to cultural traditions or norms? This chapter explores these reflective questions through the experiential narrative stories of former mid-level as well as senior career military supervisors from the US Army and former corporate executives of companies operating in Latin America and the Caribbean.

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Toxic leadership is a phenomenon prevalent in the organizational landscape (Mehta & Maheshwari, 2013), regardless of whether the entity is of a private or public nature (Vreja, Balan, & Bosca, 2016). Commonly speaking, toxic leader behavior is depicted as harmful, damaging, and capable of destructive behaviors with negative impact on organizations and individual members, since its deceptive practices drive selfish attitudes and egocentric motivations (Lipman-Blumen, 2005a; Reed & Bullis, 2009; U.S. Army ADRP 6-22, 2012; Whicker, 1996). Toxic leaders may be as diverse as the inherent variety of personality differences among organizational members. The negative, destructive, or toxic leaders' terminology may have typological variations yet have common damaging effects on the workplace climate and the employees. Employees may or may not have the choice to deal with the factors contributing to a toxic environment, or escaping the influence of a toxic leader, before suffering its harmful effects. Nevertheless, it seems that often, members tend to rationalize their tolerance to toxic leadership practices.

An exploratory approach of organizational members' narrative accounts of experiences with toxic leaders provides insight into the employees' rationale for variations of tolerance. The narrative inquiry approach enables the discovery of meanings through interaction with the organizational member while a story is mutually constructed within a time, social, and location context (Clandinin, 2016). Thus, this chapter highlights the understanding of selected individual stories and the resulting effect on personal decision-making for tolerating the harmful influence of a leader. The individual rationale for tolerance may not be generalized to all members of an organization or, conversely, to serve as common justification within the broader spectrum of organizations. However, the individual stories, the effects, decisions, and behavioral responses may provide a foundation for future-focused studies or managerial assessments. Ascertaining whether a type or types of rationale for tolerance within an organization exists can assist leaders and managers to mitigate, or preclude, the harmful effects that toxic and negative behavior causes, albeit being unable to deal directly with the toxic leader.

In addition to exploring individual behavioral responses to toxic leaders, the chapter examines the experiences and decisions within the context of highly diverse organizational environments. The author obtained reflections from selected former career executive-level personnel from the US Army and several multinational corporations, each case with operational experiences within Latin America and the Caribbean.

The US military is today a more diverse force than ever before (Karmack, 2019). Representation within the US military of gender and racially diverse personnel is of a higher percentage than in the US population (Karmack, 2019). The US Army is the largest branch of the US military and, thus, a highly diverse institution. Similarly, multinational corporations operating in Latin America and the Caribbean draw human resources from a significantly diverse region (Vassolo, de Castro, & Gomez-Mejia, 2011). A small group of US Army career veterans, with former mid-level and senior leading roles, and a small group of former mid-level to senior executives from multinational corporations provided reflections about experiences and decisions made when encountering toxic leaders.

Multinational corporations that operate in Latin America and the Caribbean are likely to benefit from the vast diverse pool of personnel with a variety of dimensional differences. The Latin American and Caribbean cultures and their inherent variations within the hemisphere may also positively influence the corporate organizational leader–follower interactions. Of note, the leader–follower interaction may or may not equate to manager–employee interactions as the case of an executive position appointment. Although holding such a position can imply employee compliance and participation, it does not assure a willing receptiveness to follow leader influence. Moreover, the chapter's author recognizes the differences between the leader and manager roles. Thus, reflections collected are oriented toward the interactive influence between appointed leaders and followers. As diversity, inclusion, and cultural influences may have a positive role in the multinational corporate landscape, these elements can also influence decisions of tolerance of toxic leaders. The chapter also highlights whether the diverse environment and culture exerted influence on the decision-making of selected individual executives' stories regarding tolerance of a toxic leader in the Latin American and Caribbean setting.

Narrative Inquiry with US Army Career Veterans About Tolerance for Toxic Leaders

A narrative inquiry research approach enabled the author to pursue semi-structured interviews during a 2017 study with selected veterans of the US Army regarding exposure to toxic leaders and rationale for tolerance (Santiago, 2017). The selected small purposive sample focused on career supervisors, already discharged or retired from the US Army, exposed to

the toxic phenomenon, which opted to tolerate a leader's toxicity. The exploration of the veterans' reflective stories provided insight as to variations in the rationale for tolerating a toxic leader. The author's 2017 study (Santiago, 2017) also included several veterans of Latin American descent, which reflected on the influence of cultural context on their decisions of tolerance. Selected veterans' stories from the previous study are highlighted within this chapter and compared with the selected corporate executives' stories.

The career veterans' reflections highlighted a broad spectrum of personal rationale for tolerating a toxic leader. Although each veteran reflected on a primary rationale for tolerance, every veteran grounded a decision to a tolerance of toxicity in three additional contributing considerations: to care for subordinates, a prevailing "do not quit" organizational culture (OC), and the weight of the operational demands over personal considerations. Each veteran accounted for contextual temporal, location, and social circumstances influencing the decision to tolerate toxicity despite the harmful interaction. The selected veterans previously held supervisory, or mid- to senior-level equivalent executive positions, with a range of responsibility for the well-being of dozens to thousands of members. All veterans made a conscious decision to tolerate a toxic leader given personal considerations. In selected cases, veterans pursued reporting of the leader's toxicity through established organizational channels. In selected cases, toxic leaders were removed, while in others, the leader's behavior remained unresolved.

A retired veteran noncommissioned officer, mid-level supervisor, with over 21 years of active service in the US Army experienced negative or toxic leadership multiple times throughout an entire career. However, the veteran reflected on the most challenging experience lasting two years with an abusive immediate senior-level supervisor. The veteran was frequently yelled at, diminished while performing leader roles, and not treated according to the achieved supervisory position. According to the veteran, reporting of the leader's behavior to higher-level supervisors did not produce changes. Yet the reporting was dismissed by other seniors with comments depicting his pleas as a personal weakness. Although the toxic leader inflicted significant damage on the organizational members, the institution continued to enhance the leader's progression through promotions. The veteran contemplated leaving the Army with a loss of faith in the institution but stated that he endured the toxic behavior primarily because of years invested and nearing retirement.

A retired veteran senior field grade officer, senior-level executive equivalent, with 27 years of active service in the US Army, also experienced a career with periodic incidents from cynical leaders. However, a uniquely challenging period of interaction with a toxic senior leader occurred at the end of the career where the officer suffered the tragic loss of a child. The lack of sympathy, empathy, and compassion became evident to the career officer through cruel remarks from the toxic leader. The toxic leader regularly admonished or harassed the officer for claimed gaps in performance during the burial preparation and immediate grieving period. The officer tolerated the actions of the toxic leader in view of the late stages of the career trajectory. Avoiding contact with the leader and pursuing indirect interaction through other members became the norm in order to evade an explosive encounter. At times, the officer entertained thoughts of physically harming the leader as the toxic influence was unbearable. The officers' reactions were exacerbated by perceptions of an unresponsive and ineffective organizational reporting system. Again, concerns for retaining retirement benefits as well as securing well-being for the family nurtured a tolerating posture.

A very senior former US Army officer with over 33 years of active service experienced the influence of a high-ranking leader with an apparent excessive focus on operational accomplishment. Often, the leader's objectives to accomplish the tasks "at all costs" would not account for the well-being of the organizational members. The officer endured the influence of toxicity by balancing the objective of caring for organizational members with the overbearing pressure to attain the leader's unrealistic demands under the mantle of mission objectives. Thus, the dilemma presented to the senior officer was one of quitting the unit or tolerating the leader's toxicity in order to shield the negative from organizational members. The officer elected to protect the organizational members. However, adequate reporting from the senior officer and others about the toxic leader triggered an early departure of the leader. As a veteran of Latino descent, the senior officer reflected on the resiliency that the Hispanic cultural upbringing provided. The officers' reflection seems to be compatible with a scholar's finding that the culture prevalent throughout the Latin American and Caribbean cultures is one that promotes honesty, servant leadership, pride, resourcefulness, and a "don't quit" resiliency (Bordas, 2013).

Another officer of Latino descent at the mid-management level with nearly 35 years of experience had a very senior leader with toxic behavior

during a year-long combat deployment. The toxic leader demanded strict adherence to instructions and guidance given as "no one else could do it right." According to the leader, when objectives failed, the organizational members failed due to not adhering to the instructions or guidance given. A sense of resiliency combined with patriotism enabled the officer to tolerate the toxic interaction with the leader. The officer's values and principles would not allow quitting despite the toxicity as it would have been a sign of failing a commitment to the country, the citizens, and the family. Interestingly, the narrative of the officer's experience also highlighted a group decision to tolerate the toxic leader. As a group, a unified decision was made collectively to support each other throughout the deployment to accomplish the operational tasks and also report the leader's behavior.

As a final case, a veteran senior noncommissioned officer (senior-level, executive equivalent) with 27 years of active service experienced the case of a toxic leader with an overbearing, authoritative temperament. A pattern of outbursts, demeaning behavior, and belittling actions created a wall between mid-level supervisors and the senior leader. However, as the veteran related, a professional approach called for remaining calm and supportive of the organizational objectives while simultaneously defusing the situation. Caring for the accomplishment of the mission, as well as caring for the members of the team, were at the forefront of priorities for this former military supervisor. Tolerating the individual toxicity while accomplishing the operational tasks was considered an institutional expectation since many other members depended on their supervisory role, as the veteran related, essentially tolerance of toxicity due to a commitment to the institution and its members. Similarly, the knowledge that the operational tasks were designed to last for a short period reinforced the notion that any harm would be short-lived. Subsequently, the team met in closed doors with a senior leader, and consequently, the toxic leader was removed.

Narrative Inquiry with Former Multinational Companies' Executives About Tolerance for Toxic Leaders

A narrative inquiry research approach enabled the author to obtain the reflective stories of selected former multinational companies' executives

regarding exposure to toxic leaders and rationale for tolerance. All executives interviewed were employed by multinational companies operating in Latin America and the Caribbean within the banking, pharmaceutical, information technology, medical, and aviation industries or markets. The former executives' experiences reflected that individuals evaluated the interaction with a toxic leader and decided consciously to tolerate the harmful influence because of a personal consideration. The range of personal considerations highlighted an individual's passion for a professional role, affinity with the companies' overarching objectives, protection of individual professional development, and expectations of transitory effects of toxicity.

An executive in a multinational corporation operating in Latin America within the aviation industry reflected on the disparity between a former company's established conduct policies and several toxic managers' destructive behavior. A unique characteristic of a destructive or toxic leader is the lack of self-awareness or selfish behaviors (Doty & Fenlason, 2013; Reed & Bullis, 2009). According to the aviation mid-level executive, the leader's selfish behaviors materialized through the pursuit of personal agendas that took precedence over the working hours of mid-level executives. Moreover, the former executive recalled that while the corporate code of conduct established strict regulatory requirements for the treatment of employees with dignity and respect, often, the toxic manager was abusive, arrogant, and disrespectful. This former executive even highlighted a pattern of intrusive behavior from toxic managers that interfered with the personal lives of employees after office hours, during holidays, and vacation periods.

The aviation mid-level executive emphasized that several toxic managers seemed to be driven by the desire to outperform others to seek corporate ladder progression. Additionally, this executive noted, toxic managers took credit from others to enhance their status to achieve senior leadership positions. Enhancing their statue and taking credit for others' work is a known attribute of toxic leaders (Lipman-Blumen, 2005b). According to several other narrative interviews, toxic leaders were often viewed by senior leaders as top performers. According to Reed (2015), toxic leaders can be very motivated and dedicated but pursue the objectives of the organization in "counterproductive" ways (p. 18). Although this aviation mid-level executive reported the toxic behavior to senior management and through a well-established reporting system, the transgressions of toxic leaders were rarely corrected.

For the most part, according to the aviation company's executive, toxicity was left to germinate as a value and, therefore, selected toxic leaders became part of senior management. As to the rationale for remaining in the company for years despite evident toxic behavior, the mid-level executive opted to stay because of the passion felt for the chosen profession and affinity with the company's services. The executive depicted that following the promotions of toxic leaders, tolerating the harmful effects became an accepted pattern supportive of personal and professional goals. Regarding the toxic effects within a diverse corporate landscape, the mid-level executive described the company as highly diverse. Nevertheless, toxic leaders precluded the multiplying effects that an integrated team of different genders, racial backgrounds, and skill sets could have achieved. Selected toxic managers in the company stymied teamwork and often made ridicule of some of the diverse characteristics within the organization.

As indicated by the previously depicted experience of the aviation executive, toxic leaders tend to focus primarily on an agenda of personal advancement over the development and care of followers or valued employees. In many ways, toxic leaders attempt to justify self-serving actions through support for organizational objectives.

In another case, the exposure to toxic leadership for an executive in the information technology field within Latin America emerged during the interaction with a professionally jealous supervisor. Undue pressure, harassment, and disparagement became a consistent manager–follower pattern due to an apparent fear of displacement or insecurity. The seemingly talented executive prepared corporate presentations to a high standard that were lauded positively by peer executives but discarded as flawed by the immediate supervisor. Similarly, coordination of service projects for client companies was commended by senior leaders, but the immediate supervisor would diminish the personal achievements of the executive. The experience of the information technology executive is commensurate with the toxic typology of a destructive leader. The information technology executive tolerated the diminishing treatment by the toxic leader, due to the affinity with the company's overarching objectives for employees and benefits package.

A female executive from a multinational corporation within the pharmaceutical industry in Latin America related experiences of intimidation, abusive language, and sexual innuendo by a toxic manager. Although the manager's behavior was reported and with alleged grounds for disciplinary

action, the reports were dismissed as minor transgressions without significant merit. The young female executive decided to remain in the company in order to establish a professional resume within this reputable corporation. However, as she progressed within the company, the toxic manager continued to exert pressure on her and other managers to derail her and their career progression. Ultimately, following several years of toxic influence, the female executive left the company. In addition to the desire to develop professionally, she also attributed the initial decision to remain several years in the company, despite the toxic interaction, to a fear of failure and a desire to overcome a culture of toxic or excessive machismo (Matos, O'Neill, & Lei, 2018; Veissière, 2018).

A senior executive in another multinational company operating widely in Latin America and the Caribbean within the medical industry also reflected on experiences with a toxic leader. This senior executive spent several years interacting daily with the toxic individual and endured the brunt of extreme toxicity to the point of professional survival. The toxic leader exhibited a narcissistic, authoritative style, coupled with a micromanagement approach. The toxic leader was the most senior corporate representative at the site and considered every member to be beneath his status. According to the executive, the toxic leader did not trust the team, showed a lack of concern for employees, and led by fear. The toxic conditions favored the weak for developmental opportunities because of the opportunity for later exploitation by the toxic leader. The senior executive opted to remain in the multinational corporation because beyond the interaction with the toxic leader, the company instilled a sense of purpose and contribution. From the miserable conditions inherent to the experience with the toxic manager, this executive developed resilience to withstand the destructive effects and the ability to survive. According to the senior executive, a source of strength to endure the effects of negative leadership was the Latin American cultural upbringing as the senior executive drew from a notion of proactiveness and resourcefulness. Reporting of the dysfunctional characteristics and negative behavior was made, but no action was taken. The toxic leader's longevity and linkages within the senior leadership structure of the corporation appeared to have shielded any corporate disciplinary measures against the senior manager.

A senior executive in the banking industry experienced a toxic leader with a unique management strategy where conflict among executives was injected under the notion that it would create a competitive environment. The friction among organizational members appeared to be intended to

generate the best solutions to problems facing the corporation. However, the strategy degraded the members' motivation to work together and precluded teamwork development. Moreover, the ultimate effect of the "friendly competition" was a decline in productivity. As one of the toxic leader's conventional strategies, criticism on the effectiveness of his approach could not be questioned. Nevertheless, as this toxic leader's strategy eroded personnel motivation, dismissed individual talents and skills, and impacted the corporate bottom line, the leader was eventually dismissed. The banking executive tolerated the leader's toxicity within a personal and professional belief that toxic leaders "do not last long within well-run companies," as proven by the subsequent departure of the leader. The widely represented, diverse, and positively oriented human pool did not affect the executive's decision for tolerance. The company's established policies, reputation, and corporate actions prevailed.

Analysis of Individual Narratives

The reflective stories about the experiences of former military supervisors and former corporate executives from multinational corporations operating in Latin America and the Caribbean reinforce the view that toxic leaders may thrive in any type of organization. The broad spectrum of experiences challenged supervisors and executives at different levels, in different type of organizations as well as industries, to prompt decisions of tolerance of toxicity. Although every individual experience was socially unique, with a variety of time and location differences, the analysis of each experience highlighted that organizational members might be potentially influenced to tolerate toxicity by one personal belief or priority. Moreover, the decision under one belief or priority may also be supported by several other considerations with merit to the person. Considerations for family well-being, career completion, commitment for care of organizational members, task accomplishment, Organizational culture, and patriotism were at the forefront of reasons for military supervisors to disregard any potential individual harm. The civilian corporate counterparts' considerations ranged from individual passion for a role, professional impact, identification with corporate objectives as well as policies, and expectations of a short-lived toxic leadership interaction. According to one scholar, tolerance and susceptibility to toxic behavior may also be fueled by individual psychological and existential needs as well as uncertainty (Lipman-Blumen, 2005b).

As all individuals in the selected sample were responsible for others in the workplace, each seemed to have evaluated their responsibility to preclude harmful toxic effects to others. In selected cases, a coordinated group response materialized, while on others, an individual acted on personal belief or priority. Reporting a toxic leadership pattern once detected may stop a continuing germination of a poor organizational value with potential damaging effects to individuals and the organization. However, as depicted in some of the reflections, the results of reporting were mixed as in some cases the leaders were dismissed, while for others, there were no apparent organizational responses toward the leader's toxic behavior. Moreover, the mixed results may be commensurate with previous research which suggests that reporting toxic leaders in organizations where toxicity is prevalent may be considered a sign of weakness or grounds for potential retaliation, thus discouraging reporting (Bhandarker & Rai, 2018; Matos et al., 2018). Of note, individual narratives are recalled from what the individual lived, perceived, and knows happened. Thus, organizational actions such as firings, disciplinary measures, and dismissals may not be publicized to avoid legal entanglements. Nevertheless, pursuing responsible reporting remains a suitable approach to address toxicity.

The individual stories from former military members and former corporate executives occurred within a social context of organizations with highly diverse populations. However, individual reflections on the consideration of toxicity within a diverse environment were limited to personal views and perceptions. Specific reflections about the influence of Diversity and Inclusion (D&I) within a toxic interaction, or the decisions to tolerate a toxic leader, served to emphasize the role leadership has in dealing with these social realities. The female executive's experience with a toxic leader within her organizational context may easily correlate with a disproportionate representation of women in corporate executive roles and the hostility they often encountered (Heller & Gabaldon, 2017). The leader's toxic effects combined with a potential high masculinity environment—although not unique to Latin America and the Caribbean—pose challenges to all within an organization, to either fit, leave, or pursue effective organizational reporting of a leader's transgressions (Matos et al., 2018). On the ethnicity element, references made by a senior military officer and a senior corporate executive about the influence of perceived Hispanic cultural traditions during their upbringing on the toxic leader interaction suggest an area for potential research. The implications that individual upbringing within a given culture may foster resiliency to tolerate a toxic

leader may have merit but require further research. The relevant cultural element of power distance, which may affect fair treatment and participative approaches among members, did not emerge as a concern directly but did emerge as an implication throughout individual narratives of corporate executives (Elvira & Davila, 2005; Stawiski, Gentry, Santana, & Dinwoodie, 2015).

As selected individuals struggled with the environmental conditions within the organization, uncertainties emerged as to whether the decision to tolerate a toxic leader was also influenced by an underlying organization value. The pervasiveness of toxic leaders in organizations has been enunciated by the topic's leading scholars for over two decades (Lipman-Blumen, 2005a; Whicker, 1996). Concerns for exposure to leader toxicity (recently reclassified as counterproductive behavior by the US Army) and the potential for facilitating organizational conditions in the US Army have been studied and continue to be monitored by its leadership (Reed, 2015; Riley, Cavanaugh, Jones, & Fallensen, 2017; Steele, 2011). The presence of toxic leaders in corporations operating in Latin America and the Caribbean is not a revelation by the executives' stories. Yet despite views of Latin America as a heterogeneous region (Paludi & Mills, 2013), selected individual narratives raise concern as to whether perceived Latin American and Caribbean cultural values, such as power distance, respect for authority, paternalism, confrontation patterns, and social distance (Elvira & Davila, 2005), facilitate tolerance or resistance to toxic leadership. Selected scholars have long-highlighted organizational cultural values that facilitate the toxic interaction between susceptible members and destructive leaders (Padilla, Hogan, & Kaiser, 2007), yet empirical evidence to the effect remains lacking. A knowledge gap remains as to whether a conducive environment of toxicity also reinforces the tolerance of a toxic leader.

Conclusions

The examination of the stories about tolerance rationale for toxic leaders showed a variety of individual narratives grounded on some common factors supported by additional considerations from individual circumstances. Each individual considered the social interaction with the toxic leader and within the organization before making a decision to tolerate

despite potential harm to self, others, and the organization. The contextual timing of exposure and location seemed to influence several individual decisions such as a retirement timeline, scheduled reassignment, or expected departure of the toxic leader. Shielding or caring for followers or subordinates emerged as a genuine concern of mid-level and senior military leaders. Similarly, whether military or corporate executives, concerns for work and mission accomplishment, career development, and the well-being of families were primary factors and supportive considerations. Notably, cultural values played a role in strengthening individual resiliency, while also potentially serving as an enabler of tolerance of toxic leaders.

Tolerance of a toxic leader may be viewed as a personal or organizational phenomenon, but given its effects, it should be considered and treated as an anomaly. Any exceptions may be balanced with proactive engagement by senior leaders, other members, and effective reporting mechanisms. In selected cases within this chapter, leaders were removed due to the individual actions of responsible supervisors or groups of organizational members. The destructive effects on the organization and individuals may be long-lasting. Thus, an individual decision to tolerate toxicity should be solidified by an examination of the ramifications to self, others, and the organization as an entity. Moreover, the potential for toxic leaders to continue to hide, thrive, and progress in an organization under a mantle of support for the organization is high, if not reported, and confronted early.

Although no specific generalizations emerge from this qualitative inquiry, the insights derived from the individual narratives may serve as a foundation to ascertain the knowledge gaps or questions raised by the experiences. Future studies should explore whether facilitating organizations are germinating toxic leaders and simultaneously fomenting their tolerance as an implicit value. In inclusive and diverse environments, studies may focus on the potential vulnerability of the dimensional characteristics of individuals or the exploitation of differences by destructive leaders. The disruption of operational performance, insensitivity to D&I initiatives that hinder a toxic leader's agenda, a machismo culture, and a tendency of toxic leaders to seek exploitation are all factors to consider when diagnosing an organization's inability to benefit from D&I. Awareness of susceptible cultural practices by organizational members may preclude increased vulnerability. Diversity is a leadership multiplier as organizations

of all types can benefit from the dimensional characteristics of individuals. Nevertheless, tolerance of toxic leadership may fuel the dysfunctional behaviors of a leader and negate the benefits of D&I. As stated at the onset of the chapter, the personal stories and reflections presented here can serve to understand the harmful effects that toxic and negative behavior causes to promoting D&I in the Latin American and Caribbean workplace.

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CHAPTER 7

Life in the Margins: Harsh Reality and Challenges for the Transgender and Gender Diverse Workforce in Latin America and the Caribbean

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Introduction

Gender diverse people are discriminated against worldwide, and in some countries, the murder rates are alarming and even on the rise. According to the Transrespect versus Transphobia (TvT) Worldwide Research Project (Berredo et al., 2018), there were 325 cases of reported killings of trans and gender diverse people between October 1, 2016, and September 30, 2017, which was an increase of 30 murders compared to the previous year. Brazil had the highest reported number of killings (171), and Mexico had the second-highest number of murders (56). Since the inception of this project in January 2008 to the time of this report, a

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total of 2609 reported murders against trans and gender diverse people have been reported worldwide. The 2016 findings indicated Central and South America accounted for 78% of the globally reported murders. Over the last 20 years, those who identify as gender minorities (transgender, gender queer, gender diverse) have seen few advancements in Latin America and the Caribbean workplace. Specifically, the lack of progress is most notable in regions where there has been a long history of oppression and aggression toward gender minorities. In Latin America, Colombia and Argentina are leading other countries with protections in place regarding gender identity and allow their citizens to change their gender on governmental documents. Unfortunately, not all Latin American countries have policies in place for individuals to change their gender on governmental documents and some actually condone discrimination laws that protect employers who discriminate based on their employees's gender identity. Given the significant fear of retribution that has become a rampant issue for the gender minority community, it is not uncommon for employees to conceal their gender identity and avoid social transition or gender expression altogether. This inability to be authentic is further perpetuated in the workplace by systemic and societal oppression that negates or ignores a victim's attempt to report discrimination, other types of abuse, lack of access to services, and leads to comprehensive refusal to acknowledge their identities. The Caribbean is far less tolerant via laws and protections for transgender and gender diverse individuals. Much of the Caribbean still criminalizes individuals based on their gender identity and/or expression using antiquated "indecency" laws that were inherited from the British and French during the Colonial era. These laws, in combination with a repressive family dynamic, community, and fear of public reprisal, keep individuals underground or subject them to violent attacks. Globally, murder and hate crimes toward transgender and gender diverse individuals continue to be a source of psychological distress and shape the way gender minorities navigate their social, educational, and workplace environments. The adversity transgender and gender diverse individuals are subjected to creates barriers, further marginalization, and inequality in the workplace.

Overview

Transgender, also known as "trans," is an umbrella term that discusses a person whose gender identity varies from the antiquated gender binary

system and one's sex assigned at birth (Hyde, Bigler, Joel, Tate, & Van Anders, 2019). Gender is on a continuum, and nowhere on that continuum should it be considered pathological. Transgender and gender diverse individuals, also referred to as gender minorities, are often marginalized and invisible, even among their lesbian, gay, and bisexual community members. As a result, they often live in the margins with consistent societal pressure to conform to the heteronormative and cisgender way of life. This conformity leads to shame, invalidation of the trans person's lived experiences, and stigma. Contemporary sexual and gender minority (SGM) research continues to explore the devastating impact of stigma, social exclusion, and systemic oppression on overall mental and physical well-being. Recent health disparities research suggests those who have other intersecting identities (low socioeconomic status (SES), racial/ethnic minorities) are further marginalized and may face significant barriers to accessing health care (Berredo et al., 2018; Dickey, Budge, Katz-Wise, & Garza, 2016).

Some may question why the chapter emphasizes health disparities and healthcare when considering Diversity and Inclusion in the workplace for trans people. According to Berredo et al. (2018), in Latin America and the Caribbean, trans and gender diverse people face tremendous challenges with general inconsistencies for trans-specific healthcare needs, varying legal processes and requirements for name and gender marker changes on official documents, and lack of legislation in some areas to protect against discrimination based on gender identity. Berredo and his colleagues shared that in some Caribbean communities, gender minorities were able to legally change their name but not their gender markers, which increased the potential for anxiety, unfair treatment, and harassment for many (Balzer, LaGata, & Berredo, 2016). It is all too common for trans experiences to be minimized or dismissed, which further exacerbates any underlying mental health concerns that are often better managed after coming out as trans and beginning the social transition and gender-affirming medical procedures (hormones, hormone blockers, and surgeries).

Trans people are at greater risk for discrimination, violence, death, and suicide than their cisgender, heterosexual, and gay counterparts. Unfortunately, for trans people, violence and murder are harsh realities one must accept in a world that is dangerous and unpredictable. This is especially true among Latin American and Caribbean communities, where 2350 of the 2982 murders of trans and gender diverse people around the world

have occurred since the Transrespect versus Transphobia (TvT) Transgender Murder Monitoring (TMM) began in 2008 (Berredo et al., 2018). The impact of the heinous acts committed toward the trans community is pervasive and negatively affects all areas of functioning in and outside the workplace.

Understanding Gender Minorities

Gender is a social construct (Cartwright, Hussey, Roche, Dunne, & Murphy, 2017; Rosenblum & Travis, 2008). We are socialized to be male or female, and all the assumptions and ascribed roles one is expected to embrace are reinforced by parents, teachers, peers, and the media. When someone identifies outside the binary, they are often subjected to bullying, teasing, or worse. The concepts of sex and gender have been defined as core social factors that dictate an individual's overall health and well-being. Over the last 20 years, Latin America and the Caribbean have seen few advancements in policies and laws that aim to protect the advancement of individuals who identify as transgender, a complex term used to describe one who varies from the "norm" of their gender expression.

When discussing the concept of gender, there are four terms that are important to differentiate: sex, gender, transgender, and cisgender. Sex is an assigned label (male or female) that is determined at birth, typically by a medical provider, based on an individual's external genitalia (VandenBos, 2015). When discussing gender, one is discussing an individual's sex (i.e., male or female) through normative conceptions, attitudes, and activities socially deemed appropriate (West & Zimmerman, 1998). Gender has traditionally been conceptualized as a normative and binary construct, assuming that every individual will and can fit into a neat box of what it means to identify as a male or female. Under this construct, there are sets of unspoken (and spoken) rules that govern how an individual can dress, act, think, and portray themselves in the public eye. It is with this definition that we realize gender, a social construct, holds a destructible power to dictate how an individual is treated by their peers and the world around them. Transgender is a term used to categorize a group of individuals whose sex assigned at birth is not aligned with their gender identity, and, oppositely defined, cisgender refers to people whose birth is congruent or aligned with their gender identity (Reisner et al., 2014). While the definition of what it means to be transgender broadly

describes people who transcend society's conventional boundaries of gender, it is important to understand that these terms can maintain different cultural interpretations (Feldman & Bockting, 2003).

Harsh Realities and Legal Challenges

Over the last 7 years, Latin America has seen an influx of legislation involving sexual and gender minority rights. Spearheading this movement are countries like Argentina and Colombia, who are becoming some of the most progressive when it comes to the identification processes as well as healthcare benefits afforded to their trans residents (Ramirez, 2018). Recently, the idea of reparations has been infiltrating different federal governments concerning past treatment of trans individuals. In 2018, Uruguay enacted the law for the integration of trans person. The law sets aside a fund that is payable to a trans person who experienced discrimination, persecution, and prosecution at the hands of the previous military dictatorship that ruled from 1973 to 1985. The province of Santa Fe in Argentina updated their provincial code soon after to include gender diverse people who were incarcerated by the previous dictatorship as eligible to receive reparations (Santi & Cooke, 2018).

Stigma and Minority Stress

While the progress seems like a big step in the right direction, this does not change the stigma and ascribed stereotypes toward the trans community by their cisgender counterparts. Often, trans people face overt discrimination and abuse with the rates of transphobic attacks only increasing. Unfortunately, 78% of trans people murdered since 2008 were concentrated in Latin America. Understanding the statistics shows us that the prevalence of machismo culture and the strengthened patriarchy have a strong presence in these countries (Habib, 2018).

Minority Stress

Trans and gender diverse people still have general stressors they face day to day in a number of different areas that everyone faces. Hendricks and Testa (2012) implied that the prevalence of this stress is oftentimes exacerbated by alarmingly high rates of discrimination, rejection, and violence. They concluded that in addition to the various forms of harm they are

faced with, trans individuals also experience higher rates of mental health disorders. Intersecting identities leave trans people vulnerable to discrimination and prejudice related to their other marginalized.

To better understand the challenges that trans people are subjected to on a daily basis, it would be helpful to understand the role of minority stress plays in perpetuating and exacerbating symptoms. Hendricks and Testa reflected on Meyer's (1995) work on incorporating LGB identities with the minority stress model. He discussed three processes by which the LGB individual was susceptible to minority stress. The first being external and environmental processes that are objective, as they are observable and can be verified. Hendricks and Testa note that for trans people, this is the most easily observed aspect of the minority stress model, as laws and social structures are largely observable. Second, the trans person has anticipation and expects an external stressful event or action will occur. This means that the person must maintain a level of hypervigilance in order to remain "prepared" for defense. Lastly, Meyer (1995) discusses the internalization of external negative viewpoints toward LGB individuals. This step is the most internal process and can lead to a degraded self-worth and ultimately a damaged ability to cope with external stress. Meyer (2003) highlighted that while minority stress can increase psychological issues including substance abuse, mood disorders, suicidal ideation, and attempts; there is also resilience that can build in the face of adversity that creates a stronger sense of community. Testa et al. (2012) findings showed that the more a trans or gender diverse person was exposed to discrimination or transphobic assaults, the more likely they are to exhibit mood disorders or suicidal behavior than their LGB counterparts.

Impact of Stigma in Workplace

Workplace issues are common for gender minorities. Coming out in the workplace could be deadly with six of the ten countries who perpetrate the most transphobic murders in the world residing in Latin America: Brazil, Mexico, Colombia, Venezuela, Honduras, and Guatemala. Continued progression in the rights of trans people in the workplace is coming in the form of grassroots movements who challenge local and federal systems to continue to advance their protections of trans and gender diverse people. One scenario might involve a Latinx, trans woman from a low SES background and a White, trans woman from an affluent background. The Latinx woman, given her intersecting identities and the role of minority

stress, she would have more potential factors impacted by discrimination, internalized transphobia, etc., than the White, trans woman. When coupled with the access to healthcare and gender-affirming procedures, the White woman would have fewer potential barriers as well. Although both trans experiences may be influenced by stigma, trans women of color are disproportionately impacted by violence. The stigma associated with one's trans identity may create problems with trust in the office, lead to avoidance of the trans person coming out for fear of retaliation or violence, and ultimately would impact job performance and comportment issues.

The Grassroots Movement

The gender binary system creates a cisgender bias that affects how governmental systems, workplaces, and social norms are formed. According to the *Guidelines for Psychological Practice with Transgender and Gender Nonconforming People* published by the American Psychological Association, cisgender is defined as an adjective used to describe a person whose gender identity and gender expression align with sex assigned at birth. Using this definition, cisgender privilege pertains to all of the ways that institutional systems, rules, and assumptions favor non-trans people. Many aspects of our daily lives are gendered—from restrooms, to the clothes we wear, to paperwork and forms that we are asked to complete (APA, 2015). These gendered aspects of daily life have become a standard and unspoken part, yet their ramifications inside and outside of the workplace can have deadly impacts for trans and non-binary individuals.

Specifically looking at Latin America and the Caribbean, they are inundated with gendered language, products, services, and attitudes which lead to a multitude of various psychological and physical effects, as well as creates an unsafe breeding ground of "otherness" that challenges the safety of the trans and gender diverse population. Often this otherness serves as a way to band communities together, thus enacting the creation of grassroots action coalitions. Historically, however, the grassroots movements in Latin America were forced to take on more responsibilities due to not only fighting lawmakers to advocate for safer and more inclusive laws, but also working to create monumental change on the social level, due to the discriminatory influence of the Catholic Church. Even with some progress, setbacks to human rights have been noted in many Latin American countries (Lavers, 2017). While the Church had a foothold in legislature, they also had the cultural ear of laypeople who brought these

viewpoints into work with them on a daily basis. Blitzer (2017) discussed how the Catholic Church was beginning to lose its footing regarding trans rights as displayed by the public dispute between the former president and current vice-president of Argentina, Cristina Kirchner, and leaders of the Catholic Church regarding the treatment of LGBT people in her country.

Overview of Current Laws in Latin America and the Caribbean

Latin America, comprised of many countries, has discrepant laws surrounding trans individuals. For example, in Argentina, the process to change one's gender marker is the least invasive or time-consuming when compared to the rest of the world. In fact, Argentinians do not require a psychological diagnosis or gender-affirming medical or surgical treatment in order to be eligible to change their gender marker on government-issued identification. Instead, they file a "Change of Marker" form which reflects the gender identity of the individual in a short span of days. Additionally, doctors are required by law to provide hormone therapy and gender-affirming procedures free of cost (Blitzer, 2017). Contrastingly, in countries like El Salvador, trans individuals are often targets of transphobic violence perpetrated by local police and gangs. When looking at the Caribbean, "buggery laws," which were created to target individuals who "engage in unnatural sexual acts against the will of God and man," allow the courts to force trans and gender minority individuals to admit themselves into local psychiatric hospitals where they are often time subjected to inhumane treatment strategies. Just recently, in July 2019, the constitutionality of these buggery laws has been and continues to be challenged. Similarly, other countries that make up the Caribbean islands utilize discriminatory laws to deny citizenship and overall legal rights (HRW, 2019).

Case Example and Implications

An example of violence perpetrated by law enforcement is vividly illustrated through the story of Camila Diaz, who was a trans woman deported from the United States in 2017. Her deportation ultimately resulted in her murder by local police that took place in San Salvador as a result of her gender minority status. While hate crimes were introduced into the El Salvadoran penal code in 2015, there has never been a conviction pertaining to a hate crime in El Salvador's history, speaking to

the immense discrimination at work within the country (Ramirez, 2018). These crimes and the murder of hundreds of trans people each year lead to secondary posttraumatic stress disorder and other anxiety and mood disorders. As trans people watch the news and follow the stories online and on social media, some begin to avoid going outside their homes for fear of being raped, beaten, and/or murdered. As a result, trans people struggle academically more than their cisgender peers, and they are more likely to quit school or a job when they feel unsafe and unsupported. Violence against transgender people, often perpetuated by stigma and transbigotry, is far-reaching and negatively impacts work performance and overall physical and mental health. When one's very existence is challenged daily, the impact is pervasive. Camila is only one story depicting the marginalized and deadly experience of thousands of trans people who have been murdered worldwide.

Summary

Although the concepts of gender identity and gender expression are arguably becoming more fluid across the world, the potential of being faced with discrimination is a crucial and valid concern of sexual and gender minorities within the workplace (Bowen & Blackmon, 2003). The discrimination individuals face in the workplace environment not only leads to the lack of access to work, which in turn impacts economic stability, but also leads to the individual fleeing their country in Latin America in attempt to regain their loss of social support and community over their disclosed gender identity, but also from the severe forms of violence they face as a result (Cerezo, Morales, Quintero, & Rothman, 2014). In fact, one study found that a staggering 67% of individuals who identify as transgender reported experiencing verbal abuse, while others reported experiencing social mistreatment including being followed, stalked, mugged, threatened, beaten, sexually harassed, and even murdered (Lombardi, Wilchins, Priesing, & Malouf, 2001). While LGBT rights have expanded unevenly across Latin America and the Caribbean, Colombia and Argentina are leading the continent with protecting an individual's right to change their gender on government identification documents and laws that protect their citizens' overall well-being, despite their gender identity. In contrast, many of the other countries such as Chile, Ecuador, Mexico, Peru, Uruguay, and Venezuela do not pose the

same abilities and protections for their citizens, instead tend to support laws that instill discrimination within the workplace (Evens et al., 2019).

Alongside hiring, job security, and discrimination issues, Latin American and Caribbean trans individuals experience remarkably high rates of marginalization, pervasive social stigma, and a disproportionate amount of health problems, including HIV and an array of mental health diagnoses (Baral et al., 2013). In addition to being more exposed to different illnesses, Berkins (2008) found that trans individuals are also less likely to seek out medical care due to the high level of discrimination they face within healthcare settings. In conjunction with the plethora of negative outcomes associated with discrimination and victimization, research has suggested that trans individuals are susceptible to higher rates of suicide attempts, especially when paired with an HIV-positive health status and reported history of police violence. With trans individuals being targeted by others due to their gender identity, this raises a very important realization for the need of more inclusive reform.

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PART II

Diversity and Inclusion: LA&C Countries

CHAPTER 8

Bridging the Technical and Vocational Skills Gap in the Bahamas: The Role of Gender Diversity in the Trades

Robert W. Robertson

Introduction

The Bahamas has an economy that is based primarily on tourism and financial services. The Government of the Bahamas has identified technology and vocational training to assist in the development of the national economy.

As a part of this initiative to diversify the economy using technology, there has been a skills gap identified that represents a fundamental challenge to achieving the overall economic development goal. Increasingly, technology is viewed as a key to driving new economic opportunities for jurisdictions globally. For a viable economy, there is a requirement for a workforce that has the new skills to be globally competitive. Currently, data from recent surveys suggest that there is a skills gap with respect to the economy in the Bahamas.

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This chapter will identify the initiatives of the Bahamas to diversify the workforce. In particular, this presentation will outline the specific, innovative steps being undertaken by the Bahamas Technical and Vocational Institute (BTVI) to understand the existing and future needs of firms. These steps include the use of surveys to capture accurate and timely information on the needs of businesses, using stackable credentials to improve employee skills, using industry certifications and global accreditation standards combined with academic credits, developing dual enrollment cohorts with high schools, engaging business partners through program advisory committees, and using online and blended courses to meet the demands of geographically distributed students.

The Global Skills Gap

The literature globally suggests that there is a skills gap being faced by many businesses. Based on current trends in population, education, and labor demand, one report projects that by 2020 the global economy could face the following hurdles:

> "38 million to 40 million fewer workers with tertiary education (college or postgraduate degrees) than employers will need, or 13 percent of the demand for such workers;
> 45 million too few workers with secondary education in developing economies, or 15 percent of the demand for such workers;
> 90 million to 95 million more low-skill workers (those without college training in advanced economies or without even secondary education in developing economies) than employers will need, or 11 percent undersupply of such workers" (Dobbs et al. 2012).

In addition, a recent survey in the UK suggests that "many university degrees offered neither the technical nor vocational knowledge that businesses wanted and that more than half of UK graduates were working in non-graduate roles" (Hays, 2016). The skills gap has worsened by 8% over the past five years, it found. "What was previously a skills gap is fast becoming a skills chasm," said Alistair Cox, chief executive of Hays, the recruitment company that produced the report with consultancy Oxford Economics (Hays, 2016).

The Inter-American Development Bank notes that human capital must be the focus of investment, including specific programs in the areas of technical and vocational apprenticeships to bridge the skills gap, in the Caribbean region (Alaimo, Bosch, Kaplan, Pages, & Ripani, 2016). Similarly, a report in Canada notes that "the displacement of workers in traditional jobs is a major concern; Canada must equally focus on preparing its workforce to take advantage of new opportunities that will be created in emerging sectors. This focus means strengthening our K-12 and post-secondary education systems to teach both specialized and soft skills, thus building a strong platform for further skills development" (Advisory Council on Economic Growth, 2017). In Ireland, KPMG (2017) notes that "numerous reports have predicted the continued growth of job opportunities in Ireland in the area of ICT, and the need for suitably qualified staff to fill these positions… we have a skills gap and we need to enhance the levels of female participation." In developing countries, such as Vietnam, similar concerns exist. In Vietnam, a "World Bank survey of employers in 2014 identified gaps in job-related technical skills, as well as in cognitive skills such as problem solving and critical thinking, and core skills such as teamwork and communication. There are skills gaps and mismatches that exist between the classroom and the workplace" (*Thanh Nien News*, 2015).

The Organization for Economic Co-operation and Development observes that a significant lack of skilled workers means many employment vacancies remain unfilled. Indeed, the OECD suggests that at the height of the global financial crisis, there were still "…more than 40% of employers in Australia, Japan, Mexico and the United States that were unable to find people with the right skills" (The Council on Industry, 2012). Clearly, there are numerous concerns globally related to the skills required in a technological and globally competitive economy. These concerns span geographic boundaries and impact different types of national economies.

When considering the full range of concerns related to skills, firms (and countries) are responding to forces such as trade liberalization, globalization, and an ever-improving technology all within a more competitive economic environment. Firms are reacting by looking for solutions to manage these changes. Some of the solutions include finding support to match employee skills to evolving job requirements and encouraging educational attainment in specific job fields, both geographically and in terms of specific industries.

Cisco (n.d.) identifies seven key trends impacting technical and vocational training, including:

> "Students are entering vocational training at an earlier age and later in life;
> The international TVET market is moving "in country";
> Student retention is the new battleground;
> Delivery is now multi-model, multi- channel and immersive;
> New funding models and cost-shifting approaches are emerging to meet infrastructure demands;
> New partnerships are driving broader, deeper, and more tailored training;
> Movement between sectors is bringing old issues to a boiling point."

An observation and shared theme related to the global skills gap is the increasing relevance of women in resolving the growing skills gap. For example, the Tulsa Welding Schools notes that "as technical program educators and manufacturing employers discuss ways to appeal to more high school students, some are turning their attention to women as a potential source of new job candidates. For years, women have been slowly but surely entering the field of skilled labor. The same reasons that draw men into the field (for instance, hands-on training and assignments, rewarding work, a sense of making real accomplishments every day) are also compelling for women" (Tulsa Welding School, n.d.). Cobb (2018) suggests that trained and skilled women are the key to a thriving knowledge-based economy. Similarly, Robertson (2018) notes that there are opportunities in Tampa, Florida (USA) area to respond to the skills gap using a more diverse workforce. In the UK, there is also a critical demand for additional construction employees, and training women to take these construction jobs represents a comparative advantage on a national level (Ranstad, 2019).

In summary, many countries are facing key challenges in providing the skills required for twenty-first-century business.

Women in the Trades: A Global Perspective

As a result of the global skills gap, many countries and cities are increasingly recognizing the importance of understanding diversity opportunities within the existing workforce. By directly addressing the skills gap, these

jurisdictions are looking to improve their comparative advantage in contrast to other communities. Indeed, the International Labour Organization (2010) suggests that countries need to develop strategic approaches to recognize the critical opportunities associated with a more diverse workforce, including expanding the role of women in the economy.

Specifically, many jurisdictions are encouraging the use of more female workers in non-traditional fields such as trades. Indeed, Explore the Trades (n.d.) notes that "the plumbing, HVAC, and the electric industries' urgent need for skilled workers creates opportunities for women to enter and advance in these fields. Increasing the overall number of women working in the trades will also help to fill the imminent gap in the labor force that will be created with record-levels of upcoming retirements of skilled tradespeople. Jobs in the trades further offer women the chance for meaningful work with high wages" (Explore the Trades, n.d.). For example, "Oregon Tradeswomen promotes success for women in the trades through education, leadership, and mentorship. We were founded in 1989 on the principles that women deserve and can attain economic self-sufficiency by pursuing careers in the construction, manufacturing, mechanical, and utility trades while helping and encouraging the trades industry to build a diverse workforce" (Oregon Tradeswomen, n.d.). Also, *Tradeswomen, Inc.* is a "California organization focused on encouraging and supporting women. Founded in 1979 as a grassroots support organization, our mission is outreach, recruitment, retention, and leadership development for women in blue-collar skilled craft jobs" (Tradeswomen Inc., n.d.).

Primarily, many jurisdictions are seeing the benefits of a more diversified workforce, particularly with expanded roles and opportunities for women.

The Economy of the Bahamas: An Overview

The Bahamas has a population of approximately 400,000 people, and it is the wealthiest country in the West Indies and the third wealthiest country in the Americas. It is a stable, developing nation with an economy heavily dependent on tourism and offshore banking. Steady growth in tourism receipts and a boom in construction of new hotels, resorts, and residences had led to substantial GDP growth for many years, but the slowdown in the US economy and the attacks of September 11, 2001 held back growth

in these sectors in 2001–2003. Financial services constitute the second-most important sector of the Bahamian economy, accounting for about 15% of GDP.

However, since December 2000—when the government enacted new regulations in the financial sector—many international businesses left the Bahamas. Manufacturing and agriculture together contribute approximately 10% of GDP and show little growth despite government incentives. Overall growth prospects in the short run rest heavily on the fortunes of the tourism sector, which depends on economic growth in the USA, the basis for more than 80% of the visitors to the Bahamas. In addition to tourism and banking, the government supports the development of a "3rd-pillar," e-commerce (Alaimo et al., 2016).

A recent policy report of the Inter-American Development Bank identified several critical challenges facing the Bahamas. Specifically, the report notes that "for the past half-decade, unemployment levels have remained between 14 and 16%, with youth levels at almost twice the national rate, measured as high as 30% over the same period. According to the Labor Force Survey, female unemployment was higher than that for males in 2016 (14.5 and 11%, respectively). The overall unemployment rate declined to 9.9% in May 2017 from 11.6% in November 2016" (Wright, 2018).

BTVI (Bahamas Technical and Vocational Institute) Fast Facts

BTVI is the premier tertiary technical and vocational education institution in the Bahamas. It has a long history of providing high-quality skilled employees throughout the Bahamas. Initially established in 1949 as The National Technical School, BTVI currently serves more than 5000 students in Nassau, Freeport, Marsh Harbour, Nichols Town, and online (Fig. 8.1).

Additionally, BTVI provides a series of short non-credit courses serving approximately 1000 students. Further, BTVI has developed a dual enrollment program with high schools that allows students to take college-level credits while in high school and gain a perspective on possible future technical career opportunities. Finally, BTVI has increasingly worked side by side with business and industry to create and deliver quality training courses, many of which include external industry certifications.

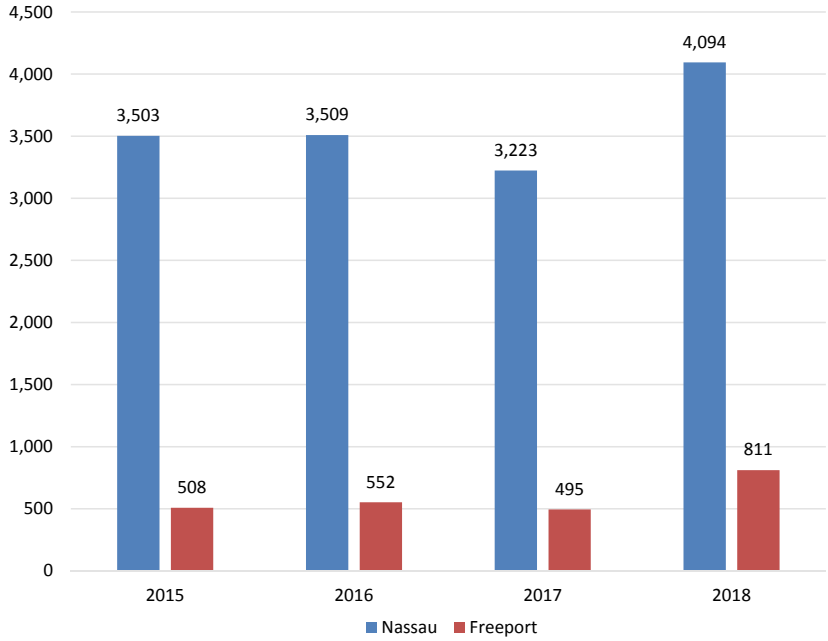

Fig. 8.1 Student enrollments by campus (*Source* BTVI Annual Report, 2019)

An example of the importance of these industry linkages is the use of industry-led program advisory councils that inform BTVI of the curriculum and specific skills required by the business sector. In that regard, BTVI recently received status as a City and Guilds Centre; BTVI was named a Cisco Academy in 2018, and BTVI has received awards for its use of CompTIA (n.d.) certifications. All of these achievements are examples of an enhanced, strategic drive to improve academic quality and links to business.

The details of the current program offerings and enrollment by program are illustrated in Figs. 8.1 and 8.2.

In addition to these courses, BTVI has developed and implemented a number of external programs including a Citizen Justice and Security training project for more than 300 inmates; an Information Communication and Technology (ICT) multi-year program training 500 high school students in technology; Ministry of Tourism Bonefish certified

Programs	2016	Percentage	2017	Percentage
Applied Associate Degree	937	23%	757	20%
Diploma	197	5%	163	4%
Certificate	1805	44%	1526	41%
Tech Prep.	380	9%	465	13%
Preparatory	255	6%	88	2%
Special Interest Courses	139	3%	163	4%
Dual Enrollment	57	1%	104	3%

Fig. 8.2 Enrollment by programs (*Source* BTVI Annual Report, 2019)

guide training; Public Service 52 Week Skills program; and numerous corporate training programs designed to meet the specific needs of businesses, including Commonwealth Brewery; Grand Bahama ShipYard; and, the Freeport Container Port. These custom programs are designed with the input and approval of the industry partner to align academic quality with the practical skills required by the particular client.

BTVI regularly graduates approximately 300 students (Fig. 8.3) with certificates, diplomas, and associate degrees. The high attrition rate reflects, in part, the opportunities that many students have once they take a portion of a particular course or program. As the trades are not generally licensed in the Bahamas, many students simply drop out early to accept a job.

As illustrated in Fig. 8.3, almost 67% of all graduates are female. Yet the percentage of female graduates in the trades remains very low. For example, there are no female graduates in plumbing, welding, carpentry, electrical and heating and ventilation, although these are key skill areas in high demand within the Bahamian economy. Fundamentally, this low level of female participation in the trade disciplines represents an opportunity to improve the economy of the country.

To assist in developing gender equality and to improve the skills in the workforce generally in technical and vocational skills, BTVI has initiated several proactive efforts designed to introduce the opportunities. These initiatives include:

Elementary School Visits to the Campus

BTVI has initiated a proactive project to visit elementary and high schools in many parts of the country to provide students with details on the types

	2016				2017			
Programme	**Graduates**	**%**	**M**	**F**	**Graduates**	**%**	**M**	**F**
Office Administration A.A.S.	**43**	17%	5	38	**39**	20%	2	37
Business Office Technology A.A.S.	**10**	4%	1	9	**11**	6%	1	10
Construction Technology A.A.S.	**6**	2%	6		**4**	2%	4	
Electronics Engineering Installers & Repairers A.A.S.	**1**	1%		1	**2**	1%	2	
Information Technology Management A.A.S.	**12**	5%	5	7	**12**	6%	6	6
Information Technology Security Server A.A.S.	**3**	1%	3					
Cosmetology	**8**	3%		8	**15**	7%		15
Fashion & Design Production 2	**1**	1%		1	**4**	2%		4
Auto Collision	**1**	1%	1		**1**	1%	2	
Auto Mechanics	**5**	2%	5		**5**	3%	3	2
Barbering	**8**	3%	5	3	**13**	7%	13	
Carpentry			2		**5**	2%	5	
Electronics & Cable Installation	**1**	1%			**1**	1%	1	
Electrical Installation	**11**	4%	21	3	**12**	6%	13	
Esthetics	**18**	7%		18	**11**	6%		11
Heating Vent & ACR	**5**	2%	6		**4**	2%	4	
Fashion & Design Production 1	**1**	1%			**3**	1%		3
Information Technology Entry 1	**4**	2%	3	1	**3**	1%	3	1
Information Technology Support Specialist	**5**	2%	5	1	**2**	1%	2	
Natural Hair Styling	**13**	5%		13				
Nail Technology	**4**	2%		4	**6**	3%		6
Office Assistant	**57**	23%	4	58	**29**	15%	3	26
Painting & Decorating								
Plumbing	**5**	2%	5	1	**3**	1%	3	
Message Therapy	**13**	5%	1	12	**10**	5%		10
Tile Laying								
Welding	**10**	4%	9	1	**1**	1%	1	
Totals:	**256**	**100%**	87	179	**196**	**100%**	68	131

Fig. 8.3 BTVI graduation statistics: graduates by programmes and gender (*Source* BTVI Annual Report, 2019)

of career options open to them. In particular, these visits are important in noting that there are many emerging opportunities in the trades for employment including self-employment.

Guidance Counselor Workshops

A key to reaching students is to ensure that the guidance counselors are aware of the opportunities that are available—and will be available—for their students. Annually, BTVI hosts workshops that identify the courses and timelines to complete programs of study. In addition, these sessions speak to the job opportunities that are available with trade and vocational training and certification.

Dual Enrollment for High School Students

Many high school students are now seeing value in taking trade courses for college credit while in high school. This can accelerate their progress to a college credential—and a better job. Also, the dual enrollment experience affords them an opportunity to actually attain practical workforce training. In many cases, students can complete a high school diploma and a college certificate at the same time. BTVI actively recruits dual enrollment students and it has developed a blended dual enrollment program that will allow high school students on the out islands to participate in this program.

More Flexible (Blended) Course Offerings

As a geographically diverse country, the Bahamas has challenges in delivering quality training across the 700+ islands. BTVI has developed and delivered blended courses to more than 600 students. In particular, a national ICT dual enrollment program has been initiated with the support of the government. This program includes a series of five courses each summer for a period of three years. Of the fifteen courses, ten carry industry certifications from, for example, Cisco and CompTIA. One element of this program has been the participation by female students in a Cisco initiative GIRLS POWER TECH. This daylong session was designed to inform students about the existing and career options available to females in technology.

Community Organizations

The Zonta Club of New Providence (Nassau) has worked with BTVI for more than ten years on developing and delivering a workforce readiness

summer program to more than 200 young Bahamian women. Essentially, Zonta International is a "…worldwide service organization of executives in business and the professions working together to advance the status of women. Zonta has been working around the world to improve the lives of women through our global service and advocacy efforts designed to prevent violence against women, increase access to education and healthcare, and expand economic self-sufficiency" (Zonta, n.d.). Essentially, the BTVI program is designed to build key technical and soft skills as well as confidence related skills required in the workplace. Many of the participants in this short training program have gone on to more formal educational opportunities.

Conclusion

There is a clearly identified skills gap impacting the global economy, which is also evident in the Bahamas. In the Bahamas, there is a particular need for a workforce trained in the trades. The training required is a necessity for both males and females. However, one specific method that can be used to address the skills gap is to ensure equity of access and opportunities for women to be trained and prepared for technical and vocational careers. In that regard, diversity will continue to drive economic development opportunities; and a skilled workforce is increasingly important.

The Bahamas Technical and Vocational Institute is the national technical tertiary academic organization providing innovative workforce-ready programs in the Bahamas. Many of these academic courses provide industry certifications in addition to academic credit. BTVI is cognizant of the vital role that women play in the economy and the roles that will be available in the future.

The overall objective at BTVI is to systematically build the Bahamian workforce to compete in a global technological world. Increasingly, this workforce will be required to mirror the diversity of the population and use that diversity to develop a competitive advantage as a country.

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CHAPTER 9

Relating Gender Diversity in Top Management Positions and Innovation: Evidence from Seven Countries in Latin America

Merlin Patricia Grueso-Hinestroza and Concha Antón-Rubio

Introduction

Gender diversity in boards of directors and top management positions—TMP—is currently a topic of interest for academics and public policymakers (Kılıç & Kuzey, 2016; Luanglath, Ali, & Mohannak, 2019; Moreno-Gómez, Lafuente, & Vaillant, 2018). One of the reasons is related to gender diversity and some progress in addressing a glass ceiling (Triana, Richard, & Su, 2019). Several studies have observed that the absence of women in TMP is associated with less effective corporate

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governance, ethical problems, fraud, and negative financial performance (Lewellyn & Muller-Kahle, 2019). However, there is also evidence that when organizations have an adequate gender-mix, financial performance is better (Christiansen, Lin, Pereira, Topalova, & Turk, 2016; Farag & Mallin, 2017; Lückerath-Rovers, 2013; Moreno-Gómez et al., 2018). Despite interest in this topic, the literature to date presents some ambiguous results.

At executive board levels within an organization, the positive relationships between gender diversity and performance have its advocates (Abdullah, Ismail, & Nachum, 2016; Hambrick & Mason, 1984; Kleinübing Godoi, Olivera Camilo, & Marcon, 2013). In a study developed by Lückerath-Rovers (2013) used a sample of Dutch companies to show that firms with women directors perform better than those without women on their boards. Similar findings were obtained from a study in Europe with companies from the banking sector that concluded when there is meaningful women representation in both the boards of organizations and in management positions, the vulnerability to a financial crisis was reduced (Farag & Mallin, 2017). Likewise, a study conducted with an extensive sample of companies in Europe showed a direct correlation between women's participation in executive positions and financial rates of return (Christiansen et al., 2016). Finally, in a sample of 54 large Colombian public businesses, Moreno-Gómez et al. (2018) concluded that the presence of women at the top of the corporate hierarchy (in the boardroom and in the top management) had a positive impact on business performance.

Nevertheless, there is also evidence suggesting small or no statistically significant relationships exist between women representation in top management and organizational performance. A study conducted by Chandani, Mabood, and Mahmood (2018) with banks in Pakistan notes that an insignificant association between board gender diversity and bank's performance. Galbreath (2018) found that women in top management positions have negligible influence in the financial performance of these organizations. Gordini and Rancati (2017) also studied the relationship between gender diversity and financial performance using 918 Italian listed companies during the years 2011–2014. The results also show that the presence of one or more women on the board of directors had an insignificant effect on the financial performance of the firm.

To make matters more confusing, other studies show a negative relationship between the presence of women in top management positions

and the performance of organizations (e.g., Adams & Ferreira, 2009; Jadiyappa, Jyothi, Sireesha, & Hickman, 2019; Singhathep & Pholphirul, 2015). Research conducted by Jadiyappa et al. (2019) showed that in Indian companies having a female CEO hurt firm performance. Adams and Ferreira (2009) also found that on average, US firms perform worse the higher gender diversity is on the executive board. Finally, Singhathep and Pholphirul (2015) observe that having women CEOs of Thai manufacturing companies is negatively related to short-term financial and long-term performance indicators.

The conflicting literature on the effects of gender diversity on organizational outcomes serves as motivation for the present chapter, which seeks to investigate the relationship of top-level female managers in the Latin American and Caribbean regions. To what degree does the relationship exist in these regions? More specifically—and in reducing the variety of possible performance indicators of organizational performance—to what degree is having a female top-level manager related to innovation in the Latin American and Caribbean regions?

The objective of this chapter is to investigate the relationship between gender and innovation in organizations, particularly related to the gender diversity of the upper echelons of corporations and innovation as a business performance indicator within Latin America and Caribbean organizations. A second objective is to assess the relationship between gender and innovation across nations Latin American and Caribbean nations, as suggested by Triana et al. (2019). A third objective is to suggest further lines of inquiry on these topics.

Gender Diversity and Organizational Innovation

Diversity focuses on the composition of factors that generally distinguishes individuals, mostly in terms of characteristics such as education, socioeconomic status, race, age, ethnicity, and gender (Nair & Vohra, 2015). The notion of diversity in organizations has recently moved from a "legal and compliance" paradigm to a "learning and integration" perspective (Nair & Vohra, 2015; Theodorakopoulos & Budhwar, 2015). On the one hand, the legal-compliance perspective focuses on fair treatment as a moral imperative and is based upon compliance. On the other hand, the perspective of learning and integration suggests that the skills and experiences of various employees constitute a valuable resource for

organizations that allow the enhancement of organizational results and as a competitive advantage.

According to The Global Gender Gap 2018 (The World Economic Forum, 2018) the region of the world that showed the most reduction in gender gap is Latin America and the Caribbean (an improvement of 0.6%) while the two regions that regressed are South Asia (−0.2%) and Sub-Saharan Africa (−0.6%). At a global level, four regions have a remaining gender gap of less than 30%: Western Europe (24%), North America (27%), Latin America and the Caribbean (29%), and Eastern Europe and Central Asia (gap of 29%). Although the participation of women in Latin American and Caribbean organizations has somewhat increased, specific studies on the relationship between gender and innovation in Latin America and the Caribbean remain scarce (Gallego & Gutiérrez, 2018).

Assessing the Latin American and Caribbean Landscape

In order to assess the relationship between gender and innovation in organizations within organizations and nations within Latin America and Caribbean organizations, secondary data for this research project was obtained from World Bank's Enterprise Surveys (2017), which is a firm-level survey of a representative sample of an economy's private sector conducted by independent contractors since the 1990s. The Enterprise Survey has collected data from more than 140,000 firms over 141 countries and is one of the datasets from the Global Indicators Group of the World Bank.

To date, the 2017 Enterprise Survey was the most recent with the largest number of Latin American countries studied (7), and within these countries, a total of 4423 firms were surveyed. Argentina collaborated with 991 survey responses, Bolivia with 366, Colombia with 993, Ecuador with 361, Paraguay with 352, Peru with 1003, and Uruguay with 347 responses. After accounting for missing data, the final sample resulted in firms from Argentina ($n = 970$), Bolivia ($n = 360$), Colombia ($n = 689$), Ecuador ($n = 355$), Paraguay ($n = 364$), Perú ($n = 1002$) and Uruguay ($n = 338$). Data for other Latin American and Caribbean countries were available but with multiple dates before 2017. For the sake of currency and consistency, a decision was made to use the most complete and recent data, which at this point was the 2017 data.

For the present comparative study, the two measures of interest from the World Bank databases were "Top Manager is Female" and "Innovation." The Enterprise Survey project defines these variables as "percent of firms with a top manager, either male or female," and innovation a percentage of firms that introduced a new product or service. Again, only the cases of Latin America firms by country having complete data for both variables were retained, which explains why the present study is limited to only seven Latin American countries. Spearman correlations were performed using SPSS software.

Using these data, a correlation between Top Manager-Female (%TMF) and Innovation (%INV) was conducted within each of the seven countries (see Table 9.1). Along with the countries are listed the surveyed sample sizes, and the percentages of those sample sizes with respect to each variable.

From the table, it can be observed that among the seven Latin American countries for which 2017 data is available and despite some significant sample sizes by country, there seems to be a weak overall relationship ($r = 0.23$) between Top Manager-Female and Innovation. Yet, there are some data points worth discussing. For Bolivia with 26.3% of Top Manager-Female (highest value) among the 360 companies sampled, there is a 60% Innovation. Conversely, Uruguay has only 10.6% Top Manager-Female of the 338 companies sampled—which is the lowest value in Table 9.1—and yet carries a high value of percent Innovation at 71.4%. Why is the relationship between Top-Level Managers-Female and Innovation higher in some Latin American countries that in others? Is there a statistically significant difference? Moreover, what is the effect of Innovation and other performance indicators when compared to Top-Level Managers-Male and Innovation? Unfortunately, the data subset by country of Top Manager-Female and Male concerning the performance indicator Innovation is not available from the data, which hinders further comparative analysis (Table 9.1).

Given the extremes noted in Table 9.1, it is not surprising that overall correlation of these variables among the seven Latin American countries and it begs the question of what other factors are moderating these relationships and to what degree. These questions are the basis of a discussion, which is the subject of the next section.

Table 9.1 Correlation by country (Top Manager-Female and Innovation)

Country	*Sample size*	*TMF (%)*	*INV (%)*
Argentina	970	8.0	49.6
Bolivia	360	26.3	60.0
Colombia	689	18.9	64.4
Ecuador	355	22.9	72.4
Paraguay	352	19.6	53.8
Peru	1002	19.9	61.3
Uruguay	338	10.6	71.4

Note Correlation between variables TMF and INV = 0.23
Source World Bank's Enterprise Surveys (2017)

Discussion and Conclusion

Despite the ambiguities in Table 9.1 and the literature, there is still some validity to the theory that women in top management positions affect innovative forces within the organization (e.g., Bolivia), albeit other factors moderation. For example, a relationship between gender diversity and innovation in manufacturing organizations was confirmed in a study developed by Garcia, Zouaghi, and Garcia (2017). They found out that a diverse composition of gender in R&D teams was positively associated with unusually high cases of innovation in the manufacturing and service sectors. Similar results were obtained by Gallego and Gutiérrez (2018) when analyzing the relationship between gender diversity and innovation in a sample of manufacturing firms in Colombia. They argue that regardless of the mode of innovation, organizations with a higher number of women participating in science, technology, and creative activities are more likely to innovate. Studies by Farndale, Biron, Briscoe, & Raghuram (2015) and Guillaume et al. (2014) point out that national culture, the political system, the economy, and the labor market are factors that moderate the relationship between gender diversity and organizational performance.

Other studies available further confirm a relationship between gender diversity and organizational. Miller and Triana (2009) argue that gender diversity in top management teams provides the firm with a more prosperous social and human capital that aids in allocating resources appropriately, producing new ideas, and detecting research opportunities, all actions that improve the firm's innovation capability. Ruigrok, Peck, and Tacheva (2007), as well as Diaz-Garcia, Gonzalez-Moreno,

and Saez-Martinez (2013), acknowledge that women in top management teams in diverse R&D teams respectively bring different abilities, perspectives, knowledge, values, and norms relevant to the team's functioning and the organization's performance. Likewise, Ostergaard, Timmermans, and Kristinsson (2011) point out that gender diversity is related to improvements in learning, creativity, problem-solving, flexibility, and a variety of other capabilities that tends to increase the probability of introducing innovations in the organization. Other studies also confirm that gender diversity in top management teams contributes to developing a broader range of capabilities, ideas, and knowledge beneficial to the organization (Ruiz-Jiménez & Fuentes-Fuentes, 2016). If nothing else, these studies can help guide further research lines of inquiry on this topic within the Latin American and Caribbean region.

This chapter intended to offer insights into the topic of gender diversity and innovation as a performance indicator within Latin America and the Caribbean. In general, this study suggests that the effects on innovation from a greater presence of women in TMP remain unclear. The association between the participation of women in management positions and organizational performance in general—and in Latin America and the Caribbean in particular—remains a topic of Diversity and Inclusion that requires further research (Ozgen, Nijkamp, & Poot, 2017). Studying these phenomena may require the examination of additional contextual factors, such as culture, politics, legislation, sector, company size, educational, social inclusion, company geographical location, to mention just a few.

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CHAPTER 10

Striving for Equity in the Educational System: A Brazilian Case Study

Margaret Huntingford Vianna

Introduction

The debate of racial identity is no longer a process of self-identification in Brazil as when the Affirmative Action Law was first introduced in the university arena. Students, who once self-identified with a particular ethnicity through parentage (Cicalo, 2013), could expect an elevated level of scrutiny by an Ethnicity Evaluation Committee to examine phenotypical features. Potential student candidates no longer decided their origin of race by ticking a box labeled white, black, brown/mixed (*pardo*), or indigenous. Striving for equity in Brazilian education now extends to external committees for assistance in deciding candidates' ethnicity when selecting students to fulfill affirmative action quotas (de Oliveira, 2017). The Affirmative Action Law and quotas for marginalized students requires an Ethnicity Evaluation Committee to eliminate fraudulent candidates from entering the competition for securing a government-funded scholarship based on self-identification measures.

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The Affirmative Action Approach in Brazil

When affirmative action quotas were introduced for the first time at the University of the State of Rio de Janeiro (UERJ) in 2003, a national outcry was provoked about the advantages and dangers of using racial measures to fulfill quotas at government-funded, or public, universities. Prior to the implementation of affirmative action measures at UERJ, Brazilian racial identity had been loosely defined (Cicalo, 2013) through self-evaluative measures. However, the rigor in the candidate application and selection process has intensified since 2003. Affirmative action measures are meant to reduce the social disparities among whites and non-whites, and ensure marginalized students are guaranteed a chance to compete with candidates from more privileged backgrounds for scholarships in government-funded, state and federal, public universities (Valente & Berry, 2017).

Despite the increased quotas at public universities for black, brown/mixed, indigenous, lower-income, and public school students, some critics of the Law of Social Quotas believe Brazilians now face a new problem with race identification. Students vying for a seat in a government-funded university under the affirmative action quotas were examined for the first time, in 2016 by the Ethnicity Evaluation Committee, for their level of "blackness." Committee members examined photographs of school identification cards and scheduled interviews with prospective candidates to size up the veracity of the students' "blackness." Committee members calculated points for a candidate's lip size, nose tip width, chin size, and hair texture during the scheduled interview. Students would also respond orally to questions regarding membership in black advocacy groups and how long they had identified as Afro-Brazilian (de Oliveira, 2017).

Contextualizing Affirmative Action

First, to evaluate the veracity and support for critics and advocates of the Affirmative Action Law—also called the Law of Social Quotas, in 2012—a glimpse into how Brazilians describe their skin color in surveys or government-run censuses is vital. Historically, Brazilians have self-identified their skin color with more than 136 categories, which extends beyond the colors designated in the current affirmative action labels of black, white, indigenous, and brown/mixed (*pardo*). The colors

Brazilians used to label their skin color in a 1927 consensus were listed as cinnamon, burnt white, light brown, brown, copper, light nut, and dark nut (de Oliveira, 2017). The multiple color identifiers reflect the complexity of the debate of affirmative action labels that enable marginalized Brazilians, black or partially black, indigenous, or public-schooled, to compete and secure a position from the fifty percent of available seats at a government-funded, public university. Brazil's diverse culture and the Brazilians' multi-ethnic identity represent the complexity of the debate of ethnicity—aligned to labels such as black or partially black, and to what degree of black—remains open for interpretation for future generations. Political and academic stakeholders continue to examine current scholarship practices (Bucci & Gomes, 2017) and debate how to improve the criteria for affirmative action policies implemented in universities so the process for scholarship distribution among the underprivileged students can be more direct and definitive (Valente & Berry, 2017).

The evaluative criteria and committee tactics have stakeholders in the political and academic arenas engaging in peppered dialogue that in many ways emulates a slave buyer's tactic. Other Brazilians view these criteria on the checklist as progressive measures for solidifying students' true racial identity. The divide is disparaging among those who agree and disagree with the race committee's power to apply applicants' points based on hair texture, lip size, and skin color, as a method to determine acceptance into a public-funded university (de Oliveira, 2017). Yet, other academics and political figures disagree with these measures and believe this act is reminiscent of slavery trades when the potential buyers would examine the slaves and scrutinize physical features and skin color. Should a student's phenotypical features of nose width and hair curl size be the decisive factors that empower committee members to confidently award a scholarship to one student-candidate over another who is a dubious degree of lighter shades? Perhaps policy makers and curriculum strategists should revisit the tenets underpinning the Affirmative Action Law (Lei das Cotas) and revise criteria for equal opportunity for candidates who also identify as brown/mixed (*pardo*) or varying shades of black (Whitney, 2013).

A possible solution to providing equal access to quality education may lie in the stakeholders' perceptions to allocate adequate funding for teachers' programs and elementary public education. Students from disadvantaged backgrounds will start from the same marker as their private-school counterparts (Chagas, 2017) rather than, align a candidate's academic capabilities based upon skin color and social characteristics. The recent

surge to mandate admission positions at public universities should extend beyond a checklist based upon social disparities (Whitney, 2013). An examination of the distribution of public funding, beginning when children start elementary school should be a national priority. This ensures all children begin at the same starting point rather than wait until university to compete for entry level to a public-funded university. Currently, public school candidates begin the university entry test—the ENEM or Vestibular—in more precarious positions than their private school counterparts (Valente & Berry, 2017). Starting with the end in mind may benefit and alleviate the dilemma that current students face applying for the seats under the Affirmative Action Law (Chagas, 2017; Valente & Berry, 2017; Whitney, 2013).

Whether political figures and academic stakeholders will effectively reexamine the underlying tenets of the social quota figures, that in 2003 were twenty percent for underprivileged students (Cicalo, 2013), but have increased to fifty percent for the quotas to remain open for public school students, most of who are identified as black, socially underprivileged, and indigenous, remains under debate in the judicial system (Bucci & Gomes, 2017; de Oliveira, 2017).

Evaluating the Effectiveness of the Affirmative Action Approach in Brazil

The Brazilian education system has long been subjected to turbulent interferences as stakeholders from political, religious, and economic entities disrupt the pedagogical planning and educational initiatives at the local level, thus leaving marks of forgotten or discontinued initiatives as political posts change over time (Bucci & Gomes, 2017). Currently, the social quotas for the underprivileged students require the prospective student candidates—who enter the university under the public school student marker—must prove that they attended public school from primary school through to high school with sealed, official transcripts (de Oliveira, 2017; Whitney, 2013). As political parties change posts, revise and create new laws, they must ensure that the Affirmative Action Law promotes academic equality for all Brazilian students to compete for government-paid scholarships, regardless of their phenotypical traits and skin color.

Critics of the Affirmative Action Law believe that the fifty percent quota standards reserved solely for public school students—who are

mostly non-white students—create a reverse discrimination situation for whites and non-whites alike. The argument is based on the foundation of skin color versus academic qualification. When a less qualified candidate is selected over a qualified candidate based on race, phenotypical features, more attention is inadvertently placed on the person's ethnicity than marketable qualifying skills. Therefore, several critics claim unfairness pervades the affirmative action policy, the Law of Social Quotas, when a qualified person with merits is discarded to fulfill the sought-after university scholarship position over the candidate with the right ethnicity or points allocated by the Ethics Committee based upon phenotypical features (Bucci & Gomes, 2017; Whitney, 2013).

Brazilian lawmakers are not alone in the struggle to write affirmative action plans that include equal access for the underprivileged in the educational arena and the workplace. The United States has faced similar complexities, wherein some affirmative action plans have been dissolved in courts or deemed unconstitutional by congressional leaders. Whitney (2013) examined how the Brazilian Law of Social Quotas would hold up under American law. In particular, the American Supreme Court voted the *Gratz v. Bollinger* case was in violation of the admissions policy, which was based solely on the candidate's race. The Affirmative Action Law must be better structured to meet the government's intent and have less restrictive means.

In this case of the Law of Social Quotas, the law requires admission placements to be allotted to black, underprivileged students based on the demographics of the region where the university is located. Yet the public school history is not regarded as a factor when determining a seat for an underprivileged student from the public school. The fifty percent requirement—or the quota system allotted for underprivileged students—is what would cause the Law of Social Quotas to be revised if considered under American laws. The government's interest to provide opportunities for underprivileged students is compelling and valid, yet "the rigid quota system reserving fifty percent of spots for public students would not meet the narrowly-tailored requirements, because there are less restrictive alternatives to achieve this interest" (Whitney, 2013, p. 379).

Advocates for equal opportunity for all Brazilian students—regardless of ethnicity or social standing—tout that government officials should invest a larger sum of public monies into the primary school system rather than into the university system. Advocates for prioritizing additional funds

first for primary school students cite the early formation years as the foundational years to learning (Chagas, 2017; Cicalo, 2013). With the early years cited as the most advantageous for constructing knowledge and scaffolding into higher level learning realms, Chagas (2017) affirmed that teachers would benefit from transformative curricular training design programs for K-12 (Chagas, 2017). Teachers are responsible for presenting the Eurocentric design that undergirds the Brazilian national curriculum. Moreover, selecting material that expands to include an Afro-Brazilian or African vision through curricular planning could be established through interdisciplinary perspectives. Rather than teach African history and folklore during Black History month in an isolated classroom, teachers should incorporate African culture through literature on a continual basis.

One alternative solution to implementing African culture and curricular activities into the elementary classroom would be for universities to include a more diverse pedagogical curriculum for teacher training (Chagas, 2017). Furthermore, the gap between public and private school students may be lessened through a revised national curriculum that prioritizes teachers' professionalization skills and also includes a diverse curriculum representative of Brazilian heritage which is largely connected to African culture (Chagas, 2017). Culturally conscious teachers manage diversity in schools more successfully than their counterparts who have not participated in diverse pedagogical programs in cultural awareness (Ellis et al., 2017). Also, Ellis et al., observed that children who learn about empathy are less likely to exhibit aggressive behavior toward others who are physically different. They learn to understand a reality different than their own, which promotes camaraderie among children and may reduce racial and ethnic discrimination in the classroom. Perhaps through a realignment of teacher programs at universities, future educators in the elementary and secondary settings would learn to teach from a more multi-ethnic, curricular lens.

Although public education is mandatory and available for all children beginning from age seven, students from more financially advantageous backgrounds naturally tend to enroll in private schools. A complexity of Brazilian schooling lies along the lines drawn between social classes and the quality of education offered to children of each social class (Akkari, 2013). In fact, public schools often lack in providing students with quality classrooms, adequate didactic materials, and well-prepared teachers, compared to the private elementary schools where teachers are well-prepared,

receive higher salaries, and the materials are of higher quality. Students who study in a public school during the primary years do not receive the same level of education as those who study in a private school during the early years. Private school graduates are better equipped to take the entry-level university examinations (Vestibular or ENEM) and therefore have a higher chance of admittance to top public-paid institutions. The duality in the public and private school systems evidences that the quality of materials, the facilities, and the teachers and their level of education employed in each system sets the precedence for the child's secondary school successes (Akkari, 2013; Cicalo, 2013).

The inconsistent quality of public primary education offered to students during the early years reflects the ongoing complexity of government-paid, public education (Akkari, 2013; Cicalo, 2013). The educational system in Brazil is a reversed phenomenon. Public-paid university institutions are sought out after primary education has been completed at private schools. The public-paid elementary institutions, for primary and high school students are of low quality and lack proper funding, which creates a system that attracts the privileged students to the private schools during the early years (Akkari, 2013; Cicalo, 2013). The underprivileged students are left with free public education, creating a gap of knowledge in a child's early life. These same public-school students are unprepared for the university placement exams that all students must complete to secure a full scholarship to a public-funded university.

Conclusion

The question remains as to whether the inequalities in Brazilian education can be improved through universalistic, class-based policies rather than a narrowly-tailored approach based on a rigid quota system. In exchange of the racially based approach, students would compete for quotas at the university level on a broader academic experience regardless of their skin color, socioeconomic status, or parents' educational level, if the public school system were improved. An increase in public spending funneled into the public school systems at the primary and high school level, and pedagogical teacher training, would leverage the academic environment for less privileged students with up-to-date materials, computers, technology, and increased community support (Cicalo, 2013). Once students are better equipped at the primary school level, in public and private schools,

stakeholders in education and the government can ensure Brazilian students from diverse social strata are equipped with marketable skills and stellar opportunities for participation in the world market.

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CHAPTER 11

Managing Disabled Inclusion Within the Colombian Workplace

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Introduction

This chapter presents an academic reflection regarding the status of workplace inclusion processes for disabled persons in Colombia from the perspective of their rights and a premise that disabled persons represent a form of enrichment advantageous to any workplace. The regulatory framework that supports national inclusion processes is presented and the figures for the current state of the disabled population's participation in work environments are described. Next, proposed is offered emphasizing

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the value of the disabled within the business agenda. Therein, the productive potential of disabled persons was recognized, as were the challenges implied by work inclusion for the business sector and other social entities. Thereafter, a transdisciplinary approach is postulated as the most appropriate social response to the complexity of workplace inclusion for the disabled. A journey through the University Institution Colombian School of Rehabilitation is presented as an example of experiences that link the business sector to academia on working together along a path to workplace inclusion. Finally, the national need to continue reinforcing the bases required for the effective achievement of work inclusion for the disabled, including the involvement of various players, disciplines, and societal sectors, is emphasized.

Diversity, Inclusion and Disability

Diversity is recognized as a manifestation of richness and added value to humanity. All actions or circumstances which place the free exercise of personal or group human rights at risk owing to differences from a majority (racial, cultural, gender, function, etc.) are considered to create a situation of vulnerability and artificial constraint, which must be addressed by the state.

The human rights outlook permeates all social spheres and makes it imperative that the state devote appropriate attention to human diversity as an integral task that involves all goods and services within the nation. This requires considering the existence of persons and groups who have historically had their rights dishonored precisely as a result of their differences, and knowing well that exclusion is generated in part by the existence of totalitarian policies created for hegemonic majorities. Thus, the concept of social inclusion—and inevitably workplace inclusion—is a political response which seeks to eliminate exclusions created by social

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biases. Inclusion—both social and in the workplace—involves all forms of actions in order to guarantee the active and complete participation of all citizens regardless of their race, gender, political or religious affiliation, age, origin, physical or social condition (García, 2004).

Currently, social inclusion is considered as an effort designed to eliminate the barring of persons or groups against which traditionally have discriminated, owing it to any condition that represents a departure from the general social norm. Social inclusion strives to preserve and capitalize upon diversity, enrich the solidary conscience, and reinforce commitments made to defend the rights of all (García, 2004).

Within the framework of the social and workplace inclusion, disability has acquired a growing interest worldwide, propelled by the increase in situations of disability related to population aging (Harwood, Sayer, & Hirschfeld, 2004). In the specific case of Colombia, the interest is also associated with an increase in the number of cases of survivors of accidents attributed to violence and illnesses which were previously considered fatal. Also, this topic has become more widely known, thanks to the efforts of a "People with Disabilities" (PwD) movement which proclaims the achievement of participation and equality within the framework of diversity defense and the search for innovative and inclusive solutions for the future of humanity (García, 2004).

Today, the term functional diversity has been situated, by independent life movements (social movements by the disabled worldwide), as a neutral alternative to traditional concepts such as disability, which in their opinion, carry negative implications. These movements instead prefer to define their differences based on biological damage and ability (Palacios, 2008). Without disregarding the political struggle of the social movements that have coined this concept—for effects of the present chapter and for the sake of the selection of an epistemological field that contextualizes the discussion of the topic addressed—the concept defined by the *Convention on the Rights of People with Disabilities*, created by the United Nations (UN, 2006) will be utilized.

The disabled have come a long way toward the attainment of full-fledged social and workplace participation in a process that has combined the efforts of families, disability organizations, professionals, and institutions. Yet there are still a great many physical and social barriers which limit the disabled's effective participation in society. For this reason, it is urgent that programs, plans, and projects for the benefit of their inclusion continue to evolve and be implemented.

According to the human rights perspective—and within the framework of the *Convention on the Rights of People with Disabilities* (UN, 2006)—inclusion scenarios are considered for those with disabilities in all social contexts whether public or private, in which a majority is involved. The achievement of inclusion is based on the effective strategies and actions performed by societies in order to promote, protect, and ensure the full enjoyment of equal conditions for all human rights and fundamental freedoms, by all PwD, in these scenarios.

The social inclusion of PwD implies guaranteeing access, permanence, quality, and exercise of freedom in the provision of goods and services of the societies to which they belong. Said goods and services include: physical contexts, transport, information, communication, Information and Communication Technologies (ICT), justice, social security (health, rehabilitation, education, work, and employment), and cultural goods and services, as well as recreational activities, leisure, and sport.

In the case of work and employment, the disabled must have the opportunity to earn a living, by way of a freely chosen or accepted job in a market and work context that is open, inclusive, and accessible, and not face discrimination in selection, hiring, employment continuity, remuneration, or professional promotion processes as a result of their disability. They disabled employees must also have, safe and healthy working conditions as well as the right to retirement benefits.

This new condition has generated significant transformations within companies, organizations, and work environments. Competencies which permit inclusion have been added to the soft competencies required in the business world, which include leadership, assertive communication, the ability to change, and analytical thought, among others, although there is greater confusion regarding the ways in which these new competencies may be enhanced. Until recently, companies managed inclusion topics by appealing to altruistic values based upon tolerance for minority groups. However, this approach has evolved in the direction of lucrative and business sustainability and competitiveness viewpoints, which represents emphasizes differential values for companies that wish to compete on national and international levels. Despite these considerations, the gap for companies to become pertinent scenarios for inclusion in Latin American and Caribbean countries remains sizable.

Since 2011, the World Health Organization and World Bank, in their World Report on Disability (WHO & World Bank, 2011), have declared that the business sector, both public and private, should concentrate their

efforts to include the disabled, ensure fair hiring practices and reasonable adaptations to work posts, and support the incorporation of those whose work activity has resulted in disability. Similarly, the generation of financing and business ventures—among other incentives for the disabled—should be promoted in order to achieve dignified employment and improve the quality of life.

Additionally, there seems to be a clear relationship between business productivity increases and inclusive organizational policies. The Gartner consulting affirms that for 2022, 75% of companies that are able to achieve their financial goals will be those with inclusive leaders and in which both Diversity and Inclusion are valued. Similarly, McKinsey & Company stated that companies with Diversity and Inclusion policies have a 35% greater chance of improving their financial performance (Gartner, 2018).

All of the above requires that the business sector comprehend Diversity and Inclusion as business and organizational value of the culture. Gartner (2018) affirms that in order to have inclusive teams, companies must reach beyond the inclusion of obvious diversities such as gender and race in order to create commitments and cultures that facilitate the inclusion of the disabled. Similarly, reviews of the institutional contexts must include better inclusion measurement indicators.

Work Inclusion for the Disabled in Colombia: Advances, Challenges, and Opportunities

The work inclusion process for the disabled in Colombia has been both slow and complex. It began with Agreement 159 of 1989, of the International Labor Organization for Professional Rehabilitation, and has continued with other agreements that, in the past forty years, have advanced the struggle against all forms of discrimination toward the disabled. The most recent link in this sequence of improvements has been a guide developed by the Colombian Ministry of Labor (2019), in which, for example, provisions were made to concede and broaden new existing benefits for companies that hire disabled individuals.

However, this law for the incorporation of PwD is just one additional step on a long journey. It is still imperative to continue addressing issues, particularly within the business sector in order to provide adequate conditions for PwD in the labor market. This business sector effort must advance a much-needed consciousness and awareness, as well as prepare

suitable leaders to promote transformation in organizational cultures that ensure inclusion. Industrious sectors, such as agroindustry and technology, are capable of contributing significantly, yet the number of PwD job postings within these sectors remain scarce. One challenge that must be overcome is a lack of tougher inclusion indicator at national level for all organizations and sectors. Although certain governmental institutions, as well as the educational sector, have incorporated inclusion as quality indicator there are still few organizations that meticulously use the inclusion formula, called INES. The INES formula was developed by the National Ministry of Education with the support of the Saldarriaga Concha Foundation and currently there is no public information which reflects the actions performed to favor organizational inclusion as a result of this inclusion index. Yet several evident cases do merit mention. For example, the "Juan Valdez" stores and property of the National Federation of Coffee Growers have designed a PwD inclusion policy using the metric. Also the "Gran Estación Mall" in Bogotá has displayed positive experiences with PwD inclusion and the indicator. These businesses have showcased the value of PwD for both the disabled persons and the organization.

In conducting a more detailed review at regulatory, political, and cultural advancements in Colombia, it can be acknowledged that since the enactment of the Political Constitution of 1991, a broader regulatory framework has been defined to favor the economic, social, and cultural rights of the disabled (Moreno, 2007). Table 11.1 details the most notable regulations and provisions from the framework.

At the national political level, the May 10, 2011 ratification of the Convention on the Rights of the Disabled is noteworthy. This convention recognizes—among other things—the right of PwD to live independently and be included in the community (Art. 19) as well as to be able to work in equal conditions with others, and the right to work and employment (Art. 27).

Accordance to the Registry for the Characterization and Location of People with Disability (RCLPD), as of March 2010, 15.2% of disabled individuals in Colombia were working, while 4.3% were seeking work. This indicates that the PwD activity rate in 2010 was 19.5% (or 42% below the rate for the rest of Colombian population). In other words, the unemployment rate for the PwD population was 22.1% (OISS, 2014). Additionally noted, this population's ability to access work opportunities declined with age.

Table 11.1 Colombian regulatory framework which favors work inclusion for the disabled

Law	*Objective*
361 of 1997	Establish social integration mechanisms for individuals with limitations, as well as other provisions
762 of 2002	Approve the international convention for the elimination of all forms of discrimination against the disabled
1145 of 2007	Organize the National Disability System
1346 of 2009	Adopt the UN convention regarding the rights of the disabled
Statutory law 1618 of 2013	Establish guarantees for the free exercise of rights for the disabled, including their work environment. Indicate inclusive measures, affirmative actions, and reasonable adjustments
Decree 2011 of November 30, 2017	Establish the percentage of PwD to be hired in the public sector (considering the size of the entity workforce and the support of worker disability certificates)
Decree 2177 of December 22, 2017	Create the Council for Disability Inclusion. Coordinate actions with the private sector, in order to favor the social, work, and productive inclusion of the disabled (includes information for work, productivity, and employment)
Decree 392 of February 26, 2018	Establish hiring process incentives for companies that hire disabled individuals

Source Guidelines for Workforce Inclusion—People with Disabilities (Colombian Ministry of Labor, 2019)

Yet in an assessment performed by the Ombudsman's Office and the Universidad de los Andes, three areas of concern were identified that must also be addressed by the government: information system improvements in order to make PwD exclusion from work a more visible issue, the design of a national plan for the elimination of workplace barriers to PwD, and the enhancement of antidiscrimination laws (Hernández, 2005). In 2016, the UN Committee for the Rights of People with Disabilities similarly recommended that the Colombian state adopt affirmative measures

for the full employment of PwD, reduce discrimination, and regulate reasonable adjustments in the workplace in order to ensure productive, dignified work for said population (PWC, ONCE, FOAL, & OISS, 2017).

According to figures reported by the National Department of Administrative Statistics (DANE), in 2010, 73.71% of PwD were not actively employed, compared to 37.25% of the rest of the Colombian population in the same situation. Regarding perceived salaries, the disabled are paid 40% less than the able-bodied population (PWC, ONCE, FOAL, & OISS, 2017). In this sense, the disabled are more likely to be unemployed and have lower incomes as compared to the able-bodied population (Colombian Ministry of Health and Social Protection, 2014). According to information from the Work Observatory of the Public Employment Service, between 2013 and 2018 over 15,600 disabled individuals nationally registered, which shows improvement in making disability and employment reporting a more visible issue in Colombia (Fedesarrollo, 2018).

Health, education, and dignified quality work represent some of the fundamental rights that guarantee the quality of life and social well-being of PwD. The World Health Organization (WHO) estimates that 15% of the world population are PwD, a proportion which certainly increases over time. In the specific case of Colombia, a population projection carried out by the Colombian Ministry of Health and Social Protection (2015) observed from the 2005 national census there was a total population of 48,203,405 people, of which 1,178,703 (2.45%) were PwD.[1] In a separate report, the RLPCD reported a 3.85% increase in PwD, on the basis of the overall population statistic from the 2005 census, which jumped from 2.45% in 2005 to 6.3% in 2015 (Colombian Ministry of Health and Social Protection, 2015).

Most studies of PwD access to rights in Colombia are still based upon the projection of 2005 census information. Hence it is estimated that, of the 1,178,703 (2.45%) PwD, 11% are between the ages of 0–19, 43% are between the ages of 20–59, and 46% are 60 or more years old. Given that Colombian work legislation imposes a minimum work age of 18 years old, and establishes the retirement age for women at 57 years old and 62 years old for men, it may be estimated that approximately 45% of PwD are of working age (Colombian Ministry of Health and Social Protection,

[1] In the 2018 Colombian census, which updated the information available for the demographic composition and characterization of the country, specific PwD data figures were unavailable.

2015). Along this characterization, the employment statistics generated by the government establishes a person's work within defined institutional (organizational) and legal frameworks, moderated by the factors of permanency over time and the nature of the business. Both factors are easily calculated, since an individually assigned salary or wage represents the fact and time frame of being employed. Besides, making the index visible is a way to widely disseminate the reality of certain legal guarantees and social protection, although this type of cautionary warning may be somewhat normalized by professional statutes or collective work agreements (Neffa, 1999). The details of this characterization are presented in Table 11.2.

Notwithstanding these statistics, they further point to a situation of inequality in the job market where 63.17% of PwD have no income, and 68% are lacking a work contract. Thus, even in the case that PwD perform productive tasks, many of them do not receive remuneration in exchange or work informally (volunteer), which increases their situational vulnerability and disqualifies them social security entitlements.

Yet the solution to this problem goes much further than what may be achieved by way of the norms or readiness of a system strictly based productivity. Work inclusion implies a coordinated effort on the part of various social systems and requires cultural transformations that involve effort on many levels, in the short, medium, and long-term outlook of an organization. It is essential for educational and labor systems to diversify the educational offerings and work opportunities which guarantee the right of PwD thereto. Consider the figures that reflect the educational level of PwD registered in the 2005 census. It was revealed that 42.8% of PwD had education levels at primary school levels, while 32.8% had no education whatsoever. The lowest percentages corresponded to the higher educational levels. Just 20.7% had completed secondary education, whereas 1.8% had a technical or technological education, 1.6% had a university education, and only 0.30% postgraduate education. Essentially, the percentage of PwD with educational levels adequate for a job which would secure access, permanence, and promotion in the workplace is in low and troublesome. In summary, to guarantee the right to education which facilitates access to dignified work for PwD, inclusion criteria must be transformed—not only in the workplace environment—but also within the educational system.

As previously indicated, work inclusion—as a component of social inclusion—is a complex social process. Workplace inclusion demands a different paradigm, one of better understanding social as well as academic

Table 11.2 Characterization of PwD work participation in Colombia

	N	*%*
Type of occupation		
Unable to work	392,508	33.30
Housework	225,132	19.10
Hired work	152,053	12.90
Study	99,011	8.40
Seeking work	47,148	4
Retired	18,859	1.60
Receive income	5894	0.50
Other activity	174,448	14.80
Unspecified activity	63,650	5.40
PwD total 2005 census	**1,178,703**	**100.00**
Monthly income range (in dollars)		
No income	744,587	63.17
Income equal to or less than $146	289,961	24.60
Income between $146 and $292	33,004	2.80
Income between $292 and $438	4597	0.39
Income between $438 and $584	2122	0.18
Income between $584 and $730	825	0.07
Income over $730	2240	0.19
Unspecified income	101,368	8.60
PwD total 2005 census	**1,178,703**	**100.00**
	N	*%*
Type of hired work		
Non-contractual	801,518	68
Undefined contract	212,167	18
Contract with undefined term	99,011	8.40
Fixed-term contract	66,007	5.60
PwD total 2005 census	**1,178,703**	**100.00**
Sector of hired work		
Service	254,600	21.60
Agriculture	231,026	19.60
Unspecified sector	432,584	36.70
Commerce	183,878	15.60
Industry	61,293	5.20
Fishing	15,323	1.30
PwD total 2005 census	**1,178,703**	**100.00**
Type of work performed		
Freelance work	398,402	33.80

(continued)

Table 11.2 (continued)

	N	%
Private sector laborers-employees	215,703	18.30
Undefined modality	203,916	17.30
Day laborer	163,840	13.90
Domestic help	74,258	6.30
Public sector laborers-employees	51,863	4.40
Unpaid family work	44,791	3.80
Boss or employer	25,931	2.20
PwD total 2005 census	**1,178,703**	**100.00**

Note These percentages are presented as related to the number of PwD—2005 census: 1,178,703 (2.45%) of the total population (the above table was created considering the information reported by the Colombian Ministry of Health and Social Protection [2015])
Source Authors at ECR. Unpublished

contexts. Inclusion is a sociocultural process which interprets public policies and makes them viable only by way of social practices. Inclusion must also be expected in educational endeavors as a strategy that responds constructively to Diversity and Inclusion, something beyond just social and work interventions. In the case of the right to work, a work integration approach focuses on normalization, the subject's adaptation to the system. This perceives PwD from standpoints of deficiency, sectorization, adaptation, and competitivity. From another perspective, work inclusion is designed for the full guarantee of human rights in equity and equality, based on recognition and the valuation of differences. Thus, subjects, with their potential abilities, may participate in the workforce in adequate contexts, free of physical, economic, and attitudinal barriers (Heras, 2018). With this distinction, workplace Diversity and Inclusion require recognition of the interdisciplinary and intersectoral efforts made to achieve its final purpose, namely, the full guarantee of these rights to PwD. An example of this pursuit is illustrated by some current Colombian initiatives which address work Diversity and Inclusion in a broader sense—certainly attending PwD cases, but also focusing on women, victims of violence, and youth—by way of prioritizing the Colombian Ministry of Labor implementation of employability and entrepreneurship programs. Here, economic ventures on both urban and rural levels have been integrated into formulating Diversity and Inclusion initiatives for new businesses that favor self-employment and the expansion of existing businesses

for individuals or groups of people, from prioritized populations (Oller, Pazoa, Oviedo, & Jorda, 2016). These employability and entrepreneurship strategies are preliminary attempts to incorporate interdisciplinary and intersectoral approaches to PwD work inclusion. Different fields have contributed to personal empowerment and social development actions, both with PwD as well as with the able-bodied. The interventions and successes from other disciplines provide ideas and initiatives to increase PwD participation in the labor pool.

Within this landscape, the contributions of the educational sector—especially those of Higher Education Institutions (HEI)—are foundational for the achievement of these social initiatives. HEI commitment to this purpose is increasing but is still small compared to the current need. In fact, HEI's themselves have been unable to adequately guarantee PwD right to education, where access, permanence, and promotion levels remain quite low. Given this constraint, it may be said that academia's institutional effort toward PwD work inclusion remains more of a longing than a reality. In light of this situation, the PwD experiences of the Colombian School of Rehabilitation (ECR) merits analysis, since it represents a case study where higher education's contribution to PwD work inclusion can be attained within the Colombian cultural context.

Approaches to Work Inclusion for the Disabled in Colombia

In Colombia, workplace Diversity and Inclusion has been addressed from approaches in accordance with the evolution of the disability concept, moving from the biological to the biopsychosocial model. From this perspective, multidisciplinary approaches, linked to assistance-related or rehabilitation models, interdisciplinary models more closely related to integration and normalization approaches, and transdisciplinary models, which attempt approaches from complexity, the perspective of rights and work inclusion, have become more frequent.

Each approach, at a given moment, has made significant contributions to the improvement of work possibilities for PwD, and has provided the necessary bases for the emergence of more efficient approaches. The multidisciplinary approach is important for the comprehension of the movement toward interdisciplinarity, owing to the need for an integrated

response to facilitate work inclusion. Interdisciplinarity mixes the practices and suppositions of the disciplines implicated, and enables greater integration therebetween (Sánchez, 2002). Thus, the interdisciplinary approach permits an improved focus on human integrality, encompassing all of its dimensions: physical, emotional, spiritual, familial, social, and cultural, in an evaluative way.

Based on the interdisciplinary perspective, PwD inclusion involves centering oneself on these individuals' abilities, identifying their strengths, in order to enhance and direct them toward the productive sector, and performing accompaniment and permanent training, in order to guarantee its continuity and promotion in the work environment. Further, it must generate satisfactory results for the individual, their family, company, and society. This process occurs through the integration of different disciplines, such as rehabilitation, health, and the social and administrative sciences, among others.

The complexity involved in a globalized society demands social, environmental, and technological challenges. As such, it requires transcendence to a transdisciplinary approach, or overcoming the discipline-based approach, as "the transdisciplinary exceeds the limits of the interdisciplinary. Its intention is to overcome knowledge fragmentation, beyond discipline enrichment, with different know-how (multidisciplinary), and via epistemological exchange and the scientific methods associated with said know-hows (interdisciplinary)" (Pérez & Setién, 2008, p. 15). From the transdisciplinary perspective, work inclusion processes must be permeated, their complexity and multiple realities understood within those in which they are framed, with a holistic point of view. This demands constructive and purposeful dialogue about the whole.

Several challenges are proposed for all protagonists in work inclusion. The health system, for example, is challenged with the connection of the entire process of attending to the disabled. Disciplines transition from egotistical competition to cooperative, proactive work, and discover new ways to find solutions. Companies must create a culture of inclusion for those with disabilities, in pro of economic growth and social transformation, while foundations must establish efficient connections that provide greater opportunities to this population. All of this must be framed within the guarantee of compliance with public policies, and together with PwD, understood as active subjects in an opportunity-laden context.

The Colombian School of Rehabilitation's Experience (Escuela Colombiana de Rehabilitación—ECR) in Work Inclusion Processes for the Disabled

When the Colombian School of Rehabilitation (ECR) started in 2012, it initiated a line of work for work inclusion, along three functions: education, research, and social projection. In terms of education, the ECR sought to diversify the traineeship and internship environments provided to students with speech therapy, physical therapy, and occupational therapy majors, in order to promote teamwork, interdisciplinary approaches to social problems and allow students to familiarize themselves with the PwD reality from an inclusion perspective. Since then, traineeship and internships have been implemented together with organizations dedicated to the promotion of linking processes between the disabled and the production sector.

The Colombian School of Rehabilitation initiated its work-centered inclusion proposal with a transdisciplinary approach, implemented in stages, namely, the preliminary, entry, and follow-up stages. Each stage required compliance with a series of actions which favored disabled individuals' access to the production sector and respectable jobs, but also sought working relationships that could be sustained over time. Figure 11.1 presents a diagram of the model used at the Colombian School of Rehabilitation and the relationship between the stages of the process and the activities implemented in each one of the phases. A brief narrative of each stage follows.

In the **preliminary stage**, the future employee's work profile had to be defined in terms of the education, training, and learning processes required for the jobs to which they had access. In this stage, task and competency evaluation processes were formulated in order to create worker profiles and use those profiles to identify elements to be strengthened prior to hiring. Concurrently, personalized interventions were performed, which allowed PwD candidates to continue at the companies they worked, while including the participation of psychology, occupational therapy, physical therapy, and speech therapy professionals, among other professionals, whose tasks were to provide an integral assessment of personal and job training needs based upon the individuals or the institutional needs to which of each PwD. Accordingly, an in-depth analysis of mutual tasks performance expectations was performed with the objective of identifying

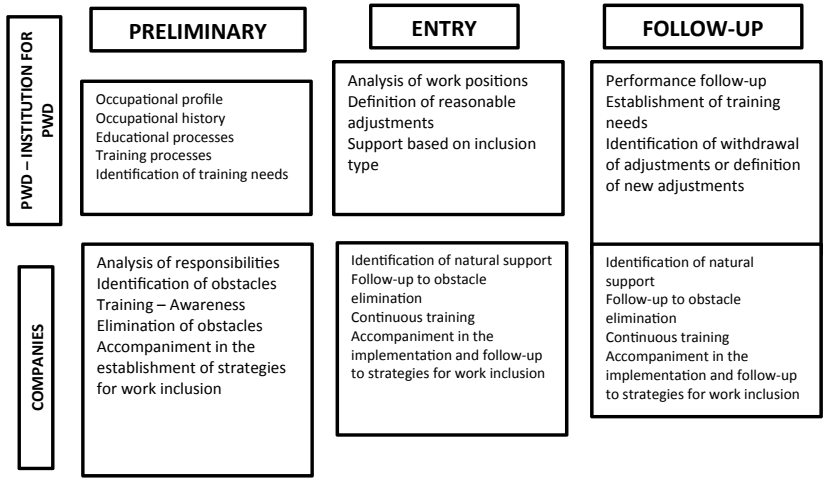

Fig. 11.1 Work inclusion as a process: ECR (*Source* Authors at ECR. Unpublished)

obstacles and potential facilitators. These assessments aided in formulating personalized strategies intended to eliminate the obstacles to job performance. Essentially, a job analysis was carried out and strategies beneficial to the PwD and the organization's Diversity and Inclusion goals were addressed simultaneously.

During the **entry stage**, the organization had to identify the jobs or posts to be filled. Then, a job post analysis was performed, in order to define the task demands of each post and identify reasonable adjustments as well as the PwD accommodations that might emerge. This allowed the definition of reasonable and necessary adjustments which would permit PwD to be independent and autonomous in their jobs and achieve the organization's expected performance thresholds. Often, the team of professionals that participated in this stage included occupational therapists and psychologists.

In the **follow-up stage**, or the third and last stage of the process, PwD worker follow-up activities and assessments of outcomes within the company were conducted in order to identify those actions with potential to improve the organization's workplace policies and further address medium- and long-term inclusion processes.

It is key to recognize that within the employment modalities available to the disabled that are available to PwD are the following: protected employment, supported employment, and personalized employment, as described by Gottlieb, Myhill, and Blanck (2010). *Protected employment* is described as the least desirable and occurs in environments in which the majority of workers are disabled and therefore require permanent supervision and support for the performance of their tasks. This modality does not significantly impact individuals' productivity in the long term, nor their socio-occupational inclusion. *Supported employment* is described as a modality through which part of the education process occurs at the work site, accompanied by a professional who offers some support but progressively disengages once PwDs become competitive and are able to establish stable relationships with their employers. Finally, *personalized employment* modality requires only the implementation of reasonable adjustments and the support necessary for task implementation. This approach is focused on persons who promote respect for diversity, company productivity, improve the organizational culture, and seek to place individuals in jobs with competitive salaries. Below is a brief description of those actions implemented by the Colombian School of Rehabilitation (ECR) via networks, foundations, and institutions that attend to PwD in the work inclusion processes.

Network Experience with the Work Support (WS) Model

The ECR is linked to the *Employment Support Network* organization, which works toward socio-occupational inclusion of the intellectually disabled by way of the ECA methodology. This methodology consists of five inclusion phases, namely, pre-placement, education and training, work search, placement, and post-placement. Of these phases, the ECR is involved in to two, which are pre-placement and the work search phases. In the *pre-placement* phase, the Faculty of Speech Therapy participates in the evaluation of communicative profiles, in various contexts. The physical therapy is charged with gross motor and muscular strength skill evaluations, while the occupational therapy area evaluates participant performance in daily activities. At the same time, the candidates' occupational profiles were composed. In this stage, the ECR was involved in the evaluation of 290 intellectually disabled individuals (Bermúdez, 2015).

In the *employment search*, the occupational therapy program participated by way of work traineeship. In this phase, analysis for the adaptation of five work posts was performed for 45 of the candidates evaluated in the first stage (*post-placement* phase).

In 2013, the first innovation derived from this alliance was created: the creation of the *Candidate Preselection Test* which includes: the evaluation of candidates' family and social contexts, the definition of competency, cognitive ability, orientation, money management, interest, commitment, management of organizational and social contexts, communicative ability, and fundamental movement pattern profiles were defined. Fundamental movement patterns included candidate ability, duration, and attention spans for performance of the motor skills associated with their work performance.

During the same period, the *Modified Evaluation Test—Type 1* was designed and implemented. This provides occupational performance information for candidates involved in a given type of activity (box assembly), and the *Pre-labor Competency Definition Test* permits the definition of a minimum competency profile at the family, pre-labor ability, comprehensive and communicative, and healthy lifestyle history levels, based upon a general observation which determines the possible factors which may positively or negatively influence candidates' occupational performance, and guide the observation to be implemented thereafter, for occupational evaluation. The network alliance also allowed the implementation of research processes related to the design of an instrument for a communication profile of the intellectually disabled, this spearheaded by professors from the speech therapy program.

Experience in Work Education Processes for the Intellectually Disabled

In 2014, the occupational therapy program designed a workshop titled *Learning to Employ You* as a project for an international foundation.[2] This project was offered to a group called "Amigos del Alma" that had

[2] This international organization is present in over 50 countries, in which it is dedicated to the promotion of the social and work inclusion of intellectually disabled individuals (Amigos del Alma).

not been able to secure or maintain any form of employment. The workshop sought to develop work competencies and the understanding of the capacities, abilities, and skills necessary to access the job market.

This workshop was framed within the phase previous to hiring, and was structured into four modules: *Social support networks, social interaction abilities, the management of executive abilities which favor pre-work and work activities, and social abilities for work*. Among the improvements made to the workshop, in 2017 a module for *Work with families* was implemented, and in 2019 a practice in real job contexts was added. Upon completion of the process, the "Amigos del Alma" occupational profile was compiled. To date, 54 persons who continue their involvement in the second stage of the process had been certified by way of the foundation's inclusion model. During 2016, technical help was provided by the occupational therapy program from the same foundation within an agreement with the *Colombian Institute of Family Well-being (ICBF-BCC)*. Among the actions implemented was accompaniment and consulting for the ICBF team awareness sessions. Furthermore, they participated in the design and implementation of workshops in five of its national regional branches: Bogota, Meta, Cundinamarca, Valle, and Antioquia, as well as in nine branch openings. Within the framework of this same contract, the *Practical guide for the creation of occupational profiles for the disabled* (Ruiz, 2017) was created. This established the conceptual framework for the creation of occupational profiles, guides for the evaluation of occupational profile competencies and occupational profile instruments. This profile permitted search orientation for work opportunities as well as improvement in PwD success levels for those who had previously participated in the process. Other fundamental contributions to the model consisted of work training offered to PwD with low education levels and scarce educational inclusion and job training opportunities.

The Work Inclusion Experience with an Institution That Serves the Psychosocially Disabled Population

The ECR occupational therapy program offered internships that oriented and supported work inclusion processes in a foundation located in the municipality of Albán, Cundinamarca. It attended to youth and adults with mental and intellectual disabilities, and those who had difficulty

becoming involved in the inclusion processes. The first strategy implemented by the Colombian School of Rehabilitation was to design the workshop titled *Creating Work Competencies*, which has a theoretical practical component applied at the foundation and a practical component which occurs in real job scenarios. In this first stage, seven individuals were trained of which four would move on to the practical phase. In 2018, 48 people were trained, of which 16 passed to the practical phase.

The process was affected by high levels of desertion in the various phases of the process, caused mainly by attitudinal barriers faced by those with mental and intellectual disabilities. These were made evident by the responses from the business partners in Albán and other sectors. This discovery required initiatives for the short, medium, and long term. The initiatives were directed at all social players who promote inclusion to build awareness and guide businesspeople as well as to populations that resisted PwD social and work inclusion.

Monitoring for Physical and Sensorial PwD Work Inclusion Processes

A private, non-profit entity founded in 1986 that works for the benefit of soldiers, policemen wounded in combat, and the families (widows and children) of members of the armed forces who perish in the line of duty also forms part of the Social and Business Defense Group (SBDG) and seeks to complement state efforts to attend to these individuals. The practices implemented in the corporation's employment program contributes along three objectives: the establishment of the *professional profile for corporation users*, considering work histories, physical evaluations, and the suggestion of possible jobs, in accordance with the national SENA classification. The second objective is the evaluation of work competencies, by way of the design of activities related to administrative assistants (merchandise classification, order organization, estimates, provider organization, confirmation, and shipping), and the construction of the professional profiles for 41 users. This permits the third objective, which is to present candidates for available job offers based upon their profiles. In 2018, 100 corporation users were assisted. They were provided job training and education in the necessary abilities for work inclusion. Professional profiles were created for 15 users, and actions related to work competency evaluation were carried out, as were visits to companies, so

as to promote work relationships with corporation users, and training days were spent with mothers, widows, wives, and daughters of soldiers or officers who perished or were wounded in combat.

Conclusions

This chapter shows that despite some level of progress, the socio-occupational inclusion of PwD in Colombia remains a challenge. The rhetoric of PwD rights must be overcome with action, a consolidation of effective initiatives and practices made available to a wider percentage of interested organizations, and a broader effort across all sectors to recognize and respond to the demands of the Colombian work environment must be prioritized and dealt with. These include the state, businesses, families, groups for the disabled, academia, and other training entities, as well as society in general. Only then will it be possible to see true progress for persons with disabilities in the Colombian workplace.

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CHAPTER 12

Assessing Diversity Across Cultures: A US-Hispanic Perspective

Nilda M. Seda-Cuevas and Ronald R. Rojas

Introduction

Although the issue of diversity in the workplace came to the forefront of corporate policies and practices during the 1970s, primarily in response to the federal enforcement of equal opportunity employment and affirmative action programs (Kelly & Dobbin, 1998), it wasn't until the 1990s that it became a highly debated and researched organizational theory topic (Seymen, 2006). Undoubtedly, anti-discrimination legislation first

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compelled changes to internal practices, yet, over time, businesses began discovering the wider value of diversity and started promoting it voluntarily as an enhancer of business performance (Jayne & Dipboye, 2004; Richard, McMillan, Chadwick, & Dwyer, 2003).

In more recent times, an interest in diversity has been reignited by factors such as immigration (Lamphere, Stepick, & Grenier, 1994), globalization (Martin, 2014), disability rights (Ball, Monaco, Schmeling, Schartz, & Blanck, 2005), spirituality in the workplace (Hicks, 2002) and religious values at work (Ball & Haque, 2003), sexual orientation (Lubensky, Holland, Wiethoff, Crosby, & Stockdale, 2004), and shifts in public opinion regarding the relevance of workplace diversity (Stockdale & Crosby, 2004). Among the purported benefits of a diverse workplace are improvements to productivity, a competitive advantage, better work relationships among employees, and an enhancement of social responsibility and ensuring of compliance (Wentling & Palma-Rivas, 1998). Consequently, organizations have increasingly invested in training programs as a pathway to a more inclusive—and competitive—positioning (Ferdman & Brody, 1996). Despite these increased training efforts, though, their measurable effects on performance remain uncertain.

Even with the apparent success of some training programs and initiatives to promote diversity as a value of organizational culture, appraisals of its performance utility remain scarce within the literature (Anand & Winters, 2008). Moreover, the most common methods of assessment are reactive in nature, consisting of external measurements related to compliance (e.g., lawsuits and grievances), internal indicators (e.g., organizations' demographics), or pre-/post testing of training offerings (Rynes & Rosen, 1995; Stutz & Massengale, 1997). Some of the more recent methodologies utilized for studying workplace diversity include evaluations against a needs assessment (Roberson, Kulik, & Pepper, 2003) and by means of a Reaction to Diversity Inventory or RDI (De Meuse & Hostager, 2001). EBSCO's *Mental Measurements Yearbook–Tests in Print* database shows just one further instrument, the Diversity Management Survey (Torres, 1995). Overall, there seems to be a significant gap in the literature between studies on the abundance of initiatives in organizational practice and research supporting the modeling, validity, and reliability of diversity effectiveness (Nguyen, 2014).

Beyond training design and research topics, however, lies the issue of the potential impact—if any—of significant demographic shifts wherein

a minority group increases in size and becomes what Wentling and Palma-Rivas (1998) referenced as a "major-minority group." In national cultures in which diversity programs in business have been reasonably effective with respect to minorities, what are the consequences with respect to perceptions of diversity and corresponding training programs when a workplace "minority" becomes a "minority-majority" (Wazwaz, 2015) or even a "new" majority (Gonzalez, 2010; Sanburn, 2015)?

One major-minority case in point worth analyzing in order to better understand the potential effects on workforce diversity perceptions is that of Hispanic and Latino Americans in some parts of the USA (Ian, 2005). In 2010, around 16% of the US population (50 million people) were Hispanics (National Council of La Raza, n.d.), representing, in turn, a considerable proportion of the total US labor force. In fact, Hispanics make up a larger share of the US workforce than any other racial or ethnic group (Craig & Richeson, 2014). More specifically, in 1988, some 9,000,000 Hispanic people were employed in the US workforce; by 2011, there were 23,000,000, and it is projected that, by 2020, 30.5 million, or 19% of the labor force, will be Hispanic. More importantly, a US Department of Labor report (Department of Labor, April 5, 2012) found that the Hispanic population tends to have a higher labor force-participation rate than do other minorities. Furthermore, the US Census Bureau has estimated that the country's Hispanic population would more than double, from 53.3 million in 2012 to 128.8 million, by 2060—which means that, by 2060—nearly one in three US residents will be Hispanic (US Census Bureau, December 12, 2012).

Per-state statistics from the Census Bureau's 2010 data (American Fact Finder, 2010) include figures that are also significant in pointing to a majority-minority. For example, 46.3% of New Mexico's population is Hispanic, while California has a 37.6% Hispanic population; Arizona, 29.6%; Florida, 22.5%, and Texas, 37.6%. Moreover, according to an earlier report from the US Census Bureau, nearly 1 in 10 of the nation's 3141 counties had, at the time of publication, a population that was more than 50% Hispanic in makeup (Fry, 2008). While the Census Bureau has estimated that the USA will become a majority-minority nation for the first time in 2043 (US Census Bureau, 2012), it seems highly likely that a majority-minority context in the overall workforce of several of the nation's states may already exist (Preuhs & Juenke, 2011).

Although such statistics point to the emergence of a major-minority Hispanic workforce in the USA, the scholarly literature has given minimal attention to better understanding Hispanic worker perceptions and behaviors (Guerrero & Posthuma, 2014). Ironically, this lack of research occurs concurrently to the period of time—2010–2020—during which people of Hispanic or Latino origin/ethnicity will account for 74% of new workers (Kochhar, 2012). Ominously, some scholars have suggested that the declining share of workforce majorities may lead to an increased resistance toward diversity, as a way to reaffirm non-Hispanic Whites as prototypical Americans (Danbold & Huo, 2015). In addition to the general paucity of research on the issue, validity and reliability data on the few instruments that are available to assess diversity are also scarce (Sanchez & Brock, 1996).

Prior literature suggests that Hispanics share values, norms, and behaviors that are different to those of other Americans and that such divergence can lead to inefficiencies, conflicts, and dysfunctions when improperly managed (Holmes, 2005). Studies exploring some of these differences have found that Hispanic people, for example, show higher levels of in-group collectivism, greater acceptance of power distance, a stronger "present time" orientation, closer personal spaces, higher importance of family ties, and more traditional gender roles than do non-Hispanic Americans (Marín & Marín, 1991). Peppas (2006) found significant variation in perceptions of hiring criteria between Hispanics and non-Hispanics. Language differences alone represent a major challenge within the organizational contexts of communications and performance (Offerman, Matos, & DeGraaf, 2014). Delgado (1994) observed that Hispanic personnel have strong loyalties to families, friends, and the organization for which they work, and tend to be more cohesive and cooperative in groups than non-Hispanic Americans. The integration of Hispanics into mainstream values has also been examined in the literature with some evidence found that they have not fully acculturated into the American culture (Romero, 2004).

The ever-increasing demand for diversity initiatives contrasted with the scant research available on their effectiveness, positioned alongside an emerging Hispanic workforce as a major-minority in the USA, sets the stage for the present study. Additionally, this topic promises to have research implications in the international arena, too, as the phenomenon of major-minorities features in other nations as well. To illustrate, there

is evidence of major-minorities in England (Wilson, 2012), Canada (Chianello, 2011), and India (*The Hindustan Times*, 2015), to mention just a few. This paper also sets out to challenge underlying assumptions framing the topic of diversity under majority-minority conditions and attempts to understand the corollaries for managing diversity in a globalized organization. What effects—if any—might an increasing majority-minority have on diversity dynamics within an organization, such as with reference to any related curricula, training, practice, and research? What underlying perceptions serve as antecedents to the design and implementation of diversity initiatives?

The main purpose of this research project is to compare diversity perceptions between a US and a Hispanic population. Having a better appreciation of Hispanic perceptions can serve as guidance for preparing, conducting and researching diversity in a majority-minority situation. Accordingly, the research question for this project was formulated as follows:

> Are the perceptions of a Hispanic workforce on diversity significantly different from those of a US workforce population in the USA?

The literature on diversity research in the workplace seems to follow three distinct tracks. The first focuses on the individual worker's abilities and challenges in dealing with dissimilar social groups or national cultures (Swann, Polzer, Seyle, & Ko, 2004; Triana, Wagstaff, & Kim, 2012; Whitney Gibson, Greenwood, & Murphy, 2011). The second takes a normative approach and emphasizes policy frameworks and institutional rules that recognize, protect, and address diversity conflicts (Abdel, 2010; Ferner, Almond, & Colling, 2005; Strachan, Burgess, & Sullivan, 2004). The third track deals with the creation and sustainment of organizational environments that thrive and perpetuate diversity as a performance enhancer. The essence of this latter approach is the building of an organizational culture that nurtures diversity (Gilbert, Stead, & Ivancevich, 1999; Rajput & Bali, 2014; Schur, Kruse, & Blanck, 2005; Waters, 2004). It is possible, too, to identify a fourth approach to workplace diversity: a cultural values framework that affects individuals, policies, and organizations' cultures (Balkin & Schjoedt, 2012; Marques, 2007; Smith, Wokutch, Harrington, & Dennis, 2004). The approach selected for the present study draws from the first approach, whereby the perceptions of a sample of individual workers from the USA are compared to those of a

sample of workers from Puerto Rico, and the fourth approach, through which the perceptions are shared along a set of values.

There is evidence in the literature of a strong direct relationship between perceptions and reactions to diversity initiatives. Here, "perceptions," or mental models, refer to "deeply ingrained assumptions, generalizations, or even pictures or images that influence how we understand the world and how we take action" (Senge, 1990, p. 8). Since perceptions are behaviorally relevant (Robbins & Judge, 2009), it follows that they will affect workers' reactions to diversity (Greenberg, 2004; Harris, Rousseau, & Venter, 2007; Woszczynski, Myers, & Moody, 2006). More specifically, a positive perception of diversity by employees has been clearly related to organizational commitment, empowerment, and job satisfaction (Wolfson, Kraiger, & Finkelstein, 2011). Equally, a negative perception of diversity has been associated with degradation in team performance (Harrison, Price, Gavin, & Florey, 2002). While the literature shows additional relationships as well (Smith et al., 2004), the point for the purposes of the current research is that collecting and analyzing perceptions can help determine if an organization's workplace is likely to be able to support diversity (Hubbard, 2004).

For this study, diversity perceptions were determined using the RDI, a tool developed over a three-year period, supported and concurrently validated by De Meuse & Hostager (2001). The RDI consists of five perceived outcomes, categorized as affective, behavioral, cognitive, personal, and organizational. Each of these outcomes is characterized by seven positive words and seven negative words representing a range of positive and negative reactions to workplace diversity. For example, the seven positive words for the *behavioral outcome* are "collaborate," "cooperate," "friendly," "listen," "participate," "support," and "understand," and the seven negative words are "blame," "fight," "patronize," "resist," "stubbornness," "unfriendly," and "withdrawal" (see Table 12.1). Each participant in the study was asked to circle all of the words frequently associated with diversity in the workplace, and from this input, a summary score was calculated. Since the inventory consists of seven positive and seven negative words for each of the five outcomes, individual scores for each outcome ranged from a low of −35 to a high of +35. In the original validation, the RDI outcomes were found to be statistically significant at the $p < .05$ level (De Meuse & Hostager, 2001).

Table 12.1 Reaction to Diversity Inventory

Directions: Circle all the words that you frequently associate with workplace diversity

Compassionate	Ethical	Anger	Unfair
Resentment	Wisdom	Insecurity	Progress
Unity	Bureaucratic	Proud	Justified
Stress	Fight	Cooperate	Happy
Support	Listen	Blame	Rivalry
Bad	Fear	Clashes	Confused
Discovery	Sensible	Frustration	Turnover
Stubbornness	Grateful	Unjustified	Harmony
Liability	Team-building	Participate	Asset
Innovation	Expensive	Hopeful	Understand
Useless	Rewarding	Sacrifice	Worthless
Unprofitable	Good	Withdrawal	Patronize
Fair	Pressure	Merit	Enthusiastic
Excited	Collaborate	Unfriendly	Profitable
Disorder	Immoral	Regulations	Useful
Resist	Unnatural	Proper	Disagree
Sleeplessness	Advancement	Enrichment	Apprehensive
Opportunity	Friendly		

Source Attitudes and perceptions of workplace diversity (De Meuse & Hostager, 2001)

Method

The population for this study was analogous to that originally selected for the validation of the RDI in the earlier De Meuse and Hostager (2001) study, namely, undergraduate and graduate business students. The original RDI study sampled 110 students, whose scores, as presented in the De Meuse and Hostager (2001) article, were then compared, in the present work, with a separate sample of students from an accredited business college in Puerto Rico. Although the specific demographics from the original De Meuse and Hostager (2001) report are not available, the typical population for the university used for testing the RDI is about 90% White and 2% Hispanic (College Profile, n.d.).

The students from Puerto Rico were selected because they were known to possess a well-defined Hispanic cultural identity, to be bilingual, to be US citizens, and to enjoy close ties with mainstream American economics. At a deeper level, differences in diversity perceptions are rooted in the values and customs of the respective national cultures (Cox & Blake, 1991;

Ng & Burke, 2004). In order to assess diversity perceptions of Hispanics in its most distinctive character, it was necessary to sample a Hispanic population with a strong national culture while at the same time maintaining certain US workplace factors. Although selecting business students from native cultures such as Mexico, Central America, South America, or even Spain would seem appealing, Puerto Rico was selected for this study not only because it also has a distinct Hispanic culture (Leibowitz, 1967), business schools are accredited by US agencies (Zammuto, 2008), they have the same currency and economic system (Collins, Bosworth, & Soto-Class, 2006), and share ties with US professional organizations, such as the Society for Human Resource Management (SHRD, n.d.), but more importantly, US Federal Labor Laws also apply (Leibowitz, 1967).

The English version of the RDI is presented in Table 12.1. In the Puerto Rican version, the 70 words were arranged identically to their positioning in the English version but translated into Puerto Rican Spanish and validated separately by professors teaching business courses at the participating college. All of the positive words retained a value of +1 and the negative words a value of −1, such that individual scores once more could range from +35 to −35, and with a score of 0 calculated if all of the 70 words were selected (circled).

The summary score identifies a participant's overall orientation toward workplace diversity, and, as a calculation, is valuable in assessing diversity perceptions as being "pessimistic," "realistic," or "optimistic." Next, statistical analysis of the scores, comparing those of the US business students in the earlier De Meuse and Hostager (2001) study against those of the Puerto Rico business students, was carried out. Analysis of variance was performed using SPSS software to test for significant differences in the samples at the $p < .05$ level. Statistically significant differences between means would suggest a significant difference in perceptions of diversity between the two sample populations.

A sample of 107 students from a major business school in southern Puerto Rico participated in the new RDI study; 55 participants were female, 40 were male, and 12 incomplete forms were collected over a four-month period. Within this population, 23 of the students were under 25 years of age, 58 were between 26 and 36, and 14 were more than 36 years old. Regarding work experience, 16 of the students had experienced less than 1 year in a workplace environment, 14 had between 1 and 2 years of experience, 27 had between 2 and 5 years, and 38 had more

Table 12.2 Statistical analysis

Descriptive Statistics						
	N	*Minimum*	*Maximum*	*Mean*	*Std.dev.*	*Variance*
US-students	110	−28	35	5.09	10.79	115.97
PR-students	107	−14	28	7.14	7.47	55.78
ANOVA						
		Sum of squares	*df*	*F*		*Sig.*
Between groups		5892.35	38	513.13		.000
Within groups		20.55	68			

Source Attitudes and perceptions of workplace diversity (De Meuse & Hostager, 2001)

than 5 years. Thus, the majority of the study's participants were between the ages of 26 and 36, and the sample represented a wide range of work experience.

The descriptive statistics are presented in Table 12.2. They show a mean of 5.09 and standard deviation of 10.79 for the US students, which resulted from the findings of the De Meuse and Hostager (2001) study. The descriptive statistics for the Puerto Rican students show a mean of 7.14 and standard deviation of 7.47. Table 12.2 also shows the between-groups sum of squares as 5892.35, with 38 degrees of freedom, $F = 513$, and significance at $p < .000$ level. Therefore, a statistically significant difference is noted between the US sample and the Puerto Rican sample.

In addition to the overall scores, the De Meuse and Hostager (2001) study also interpreted the RDI scores according to three categories: namely, "optimist" (from +11 to +35), "realist" (from +10 to −10), and "pessimist" (from −11 to −35). Category comparisons between the US and the Puerto Rican ("PR") students are presented in Table 12.3. Comparing these RDI categories between groups, the Puerto Rican sample shows a more "realistic" perspective to diversity than does the US sample. Although 35% of the US students scored higher as "optimists," the Puerto Rican students scored higher as "realists," with 68%, while still retaining a 31% "optimistic" perception. The US sample featured 7% "pessimists" whereas the Puerto Rican sample had only 1% in that category.

Table 12.3 Response to the reaction-to-diversity inventory (RDI)

Range of scale values	*US students*		*PR students*	
	Number	*Percentage*	*Number*	*Percentage*
Optimists [+11 to +35]	38	35	33	31
Realists [+10 to −10]	64	58	73	68
Pessimists [−11 to −35]	8	7	1	1
	$n = 110$		$n = 107$	

Source Attitudes and perceptions of workplace diversity (De Meuse & Hostager, 2001)

Results

The results of this study suggest there are significant differences in perceptions of diversity between the US student sample used in the De Meuse and Hostager (2001) study and an analogous sample of students from a Hispanic population in Puerto Rico. Moreover, the data show more variability of responses among the US students (115.9) than in the Hispanic sample (55.78).

Discussion

The results of this study are encouraging for a number of reasons. First, they suggest that Hispanic perceptions of diversity are quite different—in fact, somewhat more "realistic"—that may be inferred from the literature. Subconsciously, it would be easy to assume that Hispanics as a group would tend to be unduly homogenized based on a single dimension of their identity (Rodriguez, Parrish, & Parks, 2017). Regrettably, this tendency seems also present in the literature, where Hispanics are many times mistakenly lumped as a single identity despite significant cultural differences (Lee, Martin, & Hall, 2017). Here the educational and business disciplines can benefit from Sociology, where inter-cultural dynamics of group diversity, attitudes, behaviors, and experiences—if openly recognized and properly managed—are known to have a positive impact on organizational effectiveness (Rivera, 2014). If these perceptions hold true, it can be anticipated with some confidence that diversity initiatives in the workplace would be well received among a Hispanic majority-minority, provided that cultural sensitivities are properly acknowledged.

Secondly, the study reinforces the supposition already stated in the literature that collecting and analyzing perceptions can help to determine whether an organization's workplace would be able to support diversity. The dynamics of a majority and the influence of other minorities notwithstanding, the present study supports the proposition that a Hispanic majority-minority would tend to react positively to diversity initiatives. However, given the small size of the sample selected for this study, such inferences should be considered with caution. Plus, there remain additional factors to be taken into account in order to formulate a more definitive understanding of a Hispanic majority-minority, such as generational differences among Hispanics and tensions between Hispanic cultures (Markert, 2010; Tung, 2008). This study provides some insights into further research possibilities, such as assessments of the effects of national cultures in understanding diversity perceptions, which is especially important for diversity initiatives within a "globalized" workforce.

There are also possible considerations that go beyond the scope of this exploratory study yet have some merit as suggested topics for further research. The attention of this research project to the majority-minority phenomenon poses a challenge to some aspects of the current thinking on organizational dynamics, especially within the context of globalization. For example, to what degree does a majority-minority identity affect the socio-structural nature of power, communications strategies, acculturation processes and relational performance expectations within global business organizations? What are models of behavior that guide majority-minority conformance to majority norms, or at least, provide a better understanding of managing multiple sub-cultures within an organization? To what degree does the limited situation of women in business executive positions (glass-ceiling or similar syndromes) in some countries conform to majority-minority dynamics? Also, what lessons can be derived from business organizations in other nations—such as China, Canada, Saudi Arabia, and Switzerland—that have a longer history of coping with majority-minority situations, and to what degree do these dynamics contribute to their own globalization effectiveness? Undoubtedly, developing acceptance of dimensional values in relation to diversity perceptions in a multicultural workforce is also a consideration in the design and implementation of training programs and in assessing impacts on business performance. Additional research in correlating RDI scores along Hofstede's (1984) cultural dimensions, for example, may bring about more concrete guidance for diversity initiatives. Interestingly enough, there are prior

studies that demonstrate cultural differences between individuals from the USA and from Puerto Rico using Hofstede's model (Rivera-Vazquez, Ortiz-Fournier, & Flores, 2009) that may explain the differences in diversity perceptions arising from this study. Similar studies with workforces of other cultures may be warranted.

The outcomes of this research suggest a need for alternative approaches to the training, designing, and research of diversity discussed in the literature review. For instance, shifts in demographics from a minority to a major-minority may very well drive a need for more representative and inclusive recruiting, selection, and training of supervisors and managers (D'Netto & Sohal, 1999; Morrison, 1992). Additionally, a major-minority situation may also prompt the need for wider use of qualitative approaches to diversity research (Sundin & Due Billing 2006), since quantitative assessments are less effective in obtaining sensitive data, are inflexible in scope, and may lose valuable insights when reducing the data to just numbers (Mertens, 2014; Pitts & Wise, 2010).

Various practical applications also emerge from this study. First of all, getting to appreciate a national culture in a fuller sense rather than learning from a minority subset seems a better grounding for understanding diversity reactions, especially in challenging some of the paradigms of management in a major-minority situation (Laurent, 1983). Also, the construct of "homogeneous national cultures and values" may be flawed, since intra-national cultural variations can sometimes be as significant as cross-national differences (Tung, 2008). Furthermore, the overemphasis on the relationship between diversity and internal organizational effectiveness may undermine other more relevant performance indicators, such as competitiveness in the global landscape (Cox & Blake, 1991).

Some limitations and delimiters of this study are worth noting. First, the earlier literature on the RDI is not clear regarding the cultural background of the sample used for validation. The assumption is that the US sample used for validation represents the "American perspective" on diversity. Second, the Spanish language has many variations and some words used in this study for use in Puerto Rico may require modification and validation for use in other Spanish-speaking countries. Likewise, although the main cultural heritage in Puerto Rico comes from Spain, the island maintains close ties across many fronts with the USA (e.g., US multinational corporations and franchises), and so there may have been subliminal American cultural influences within the sample Puerto Rican workforce. Finally, there is a possibility that the selection of the college

in Puerto Rico used for this study might not necessarily represent mainstream national culture, given the institution's educational objectives and mission.

Notwithstanding these limitations and delimiters, though, the present study nonetheless identifies significant differences in diversity perceptions that may affect organizational dynamics and will undoubtedly encourage further research.

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