

Chapter 16

Diversity, Equity and Inclusion as Fertile Foundation for Workplace Well-Being, Optimal Performance, and Planetary Health



Wanda Krause

Prologue

I once had to narrow down over three hundred applications to the top 10 for a position. I created criteria that were as objective and as aligned as possible to the requirements of the position. I then rated each candidate in terms of experience, achievements, and education against each criterion, based on clear, quantifiable, measures. I whittled down the candidates to the ten, as requested. One person stood out on the list. After this task, I was to present the list to the ultimate decision maker. Given the unwritten rules within the environment and already clarified justification that the race of this applicant – comprising about one-fifth of the world’s population – would not be respected by those who would be reporting to them, I already knew this person would be a hard sell. But I went to my scheduled meeting with the selections on a sheet and their CVs in hand. In the meeting, I put this top candidate’s CV in front of my meeting host explaining how this person came out on top pointing to the criteria. It would be apparent that those who ranked second, third, and so on, didn’t come close to the calibre of this one candidate. I didn’t get to explaining this thinking. The decision maker picked up the CV, in the air swiftly flipped it face down and slammed it on the desk, saying one word, “next!”

My interest over the past few decades relates to how to create more integral change processes, leadership, and civil societies, globally. This goal connects to colonization/decolonization, diversity, equity and inclusion, human rights issues, and attention to gender issues. Many of the contexts in which I have conducted research are those of high-risk environments or where human rights abuses put some of these countries at the lower rankings of human rights indexes. However,

W. Krause (✉)
Royal Roads University, Victoria, Canada
e-mail: Wanda.lkrause@royalroads.ca

throughout my career one observation has become notable. In European and North American contexts are countless forms of racism and xenophobia in the workplace and communities. In my experience, in Europe and North America these situations are not entirely different from my example above, outside of the “West”. Russia’s atrocious and illegal invasion of Ukraine is one case in point for Europe.

Recent events demonstrate a disheartening trajectory of increasing hate, including in western societies, and not surprisingly increased discussions around DEI (Ferdman, 2017). In 2020 the murder of George Floyd in the U.S., a 46-year-old Black man, by police officer, Derek Chauvin, together with three other officers, sparked nationwide protests against police brutality. In Canada, the killing of a Muslim family in 2021 brought greater attention to the long standing and growing situation of Islamophobia. The province of Quebec became the first jurisdiction in North America to ban religious symbols for public servants, despite U.N. investigators having called the Quebec legislature on violating fundamental rights – the freedom of religion and equality (Maimona, 2019). The family’s killing occurred after the worst mass murder to take place in a house of worship in Canadian history happening in 2017 – the Québec City mosque massacre. Canada has a nine per cent increase in anti-Muslim attacks in 2019 compared to the previous year, according to Statistics Canada (Gilmore, 2021). In the U.S., the FBI’s annual Hate Crime Statistics Act (HCSA) report concluded 2019 saw the highest number of hate crimes recorded since 2008 (FBI, 2019). In the above Canadian example, prohibiting specific religious dress can be seen as example of religious persecution (See Maimona, 2019). Prime Minister Trudeau has said he personally disagrees with the law in Canada but has defended Quebec’s provincial right to put forward its own legislation (Gilmore, 2021).

These trajectories are no surprise to many. In May, Tk’emlúps te Secwépemc First Nation announced that the remains of 215 children had been found near the city of Kamloops in southern British Columbia (BC), at the Kamloops Indian Residential School. This was the largest such institution in Canada’s residential school system. It operated between 1890 and 1969, holding up to 500 Indigenous students at any one time, and between 1969 and 1978, was used as a residence for students attending local day school. May of 2021, subsequently, saw the discovery of the 751 unmarked graves of the by the Cowessess First Nation in Saskatchewan near the former Marieval Indian Residential School, which operated from 1899 in 1996 under the control of the Roman Catholic Church. Added to this discovery are the bodies of 182 found near the grounds of the former St Eugene’s Mission School, BC, which was also operated by the Catholic Church from 1912 until the early 1970s (Honderick, 2021). In Manitoba further graves have been discovered. In an open letter by the Yukon regional chief of the Assembly of First Nations and citizen of the Kluane First Nation, Kluane Adamek (2021), writes:

I cannot help but think of the parents who were never able to kiss them goodnight, hug them when they were hurt, or even lay a flower on their graves. I cannot help but think about the children themselves, or the generations who would have followed but are now gone. But then, that was the plan, wasn’t it? The government’s plan is reflected in the words of residential school system architect,

Duncan Campbell Scott: “I want to get rid of the Indian problem”.

The landmark Truth and Reconciliation Commission (TRC) report, released in 2015, described the government-led policy as cultural genocide.

Such challenges of racism, Islamophobia, xenophobia, colonialism, cultural genocide, and any global leadership challenge, for that matter, requires a holistic approach. Such challenges are imbedded in systems and contextualized in systemic racism, Islamophobia, xenophobia, cultural genocide. A holistic approach, as such, needs to include mindset or worldview change, behavior change, culture shifts, and systems change as critical for wellbeing and planetary health. This means geographically everywhere, and not just those places described as “underdeveloped”. Inequity and exclusion persist across systems – within organizations, society, and in view of increasing global challenges, across the planet. This chapter speaks more specifically to organizational leaders and managers to create culturally safe, equitable, and inclusive environments. Immigration, guest workers, gender, sexual orientation, sex identity or fluidity, religious affiliation, ethnic and racial differences, age, disability, among further intersectionalities, are changing the composition of places. This trend will be amplified in the decades to come (Mor-Barak, 2015). However, greater diversity in and of itself does not mean equity, access, rights, or safety. More significantly, the need is to develop competencies to lead a world more conscious of diversity, equity, and inclusion where a more decolonized mindset and array of practices can set course for healthier trajectories. The workplace is one sphere and therefore fertile ground for this work.

Introduction

This chapter discusses how organizations not only have a role in ensuring diversity, equity, and inclusion (DEI) in the workplace itself but in identifying DEI in the workplace as a fertile foundation for overall well-being, optimal performance, and planetary health. The workplace, here, includes for-profit and not-profit forms of organization. While civil society has long been recognized as essential for supporting a strong civilization, the private sphere has been seen as the sphere that has the potential to sever the ties important for the creation of civil society (Ehrenberg, 2017). The logic is that self-interest of for-profits will come before public interest. However, one way of understanding and measuring the expansion of civil society is through shifts in values that underpin a culture (Krause, 2008, 2012). The focus ought to be whether there are shifts occurring in values around tolerance, cooperation, collaboration, trust, reciprocity, and inclusion, as well practices and policies to facilitate and anchor these shifts. The health and well-being of individuals in an organization are also core. Health and well-being include physical, emotional, and psychological safety.

As such, all workplaces have a responsibility to ensure culturally safe, equitable, and inclusive environments. Leaders and managers have an opportunity to lead and

support DEI initiatives. However, a holistic approach, that is, mindset or worldview change, behavior change, culture shifts, and systems change, is essential to any strategy for DEI. Organizational leaders require the systems thinking and practical steps for implementing DEI within their organizations and to see and map how these changes and shifts may impact on the larger social and planetary systems. This chapter describes the essential qualities, tools, and techniques organizational leaders need to be able to harness the strengths of inclusivity, equity, and well-being for optimal performance and planetary health.

In this discussion, I advance the concept of planetary health, to evolve thinking about change for the macro-global level from the bottom up, including spaces of organization, such as the workplace. The assumption guiding this effort is that change can be influenced through grassroots being, doing, and seeing. If beliefs, expectations, and agency around DEI are embraced at the grassroots, greater well-being is advanced at the more macro-levels. As Prescott and Logan (2019) argued, the role of beliefs, expectations, and agency are core in linking narrative and planetary health. DEI and well-being from the bottom-up lead to optimal performance which has the potential to have an upstream or upwards impact on global well-being and planetary health. In offering such overarching conceptualization, I endeavor to motivate a process that includes decolonization of mindset and organizational space and embracing strategies for empowerment of under-represented peoples in these spaces that is justice oriented.

The vision of planetary health and the argument of systems change is to create greater diversity, equity, and inclusion within the workplace. This chapter, thus, begins with the concept of planetary health, DEI and interlinked terms related to justice and decolonization, which some refer to as justice, equity, diversity, decolonization, and inclusion (JEDDI). It ends with key takeaways and reflective questions to further thinking and conversation. Optimal performance within the workplace has everything to do with well-being, success, and the health of all individuals. Greater diversity, especially at the leadership levels, has been correlated with positive performance outcomes, including better economic outcomes (Nakui et al., 2011). Creating an inclusive culture has been correlated with increased retention, commitment, and well-being (Brimhall et al., 2017). Inclusion has been found to lead to increased engagement of individuals in the workplace (Kuknor & Bhattacharya, 2020). Hence, from both a meso-level (workplace/organizational) and a broader, macro-level perspective (environment), we ought to endeavor to decolonize our spaces, that is within the organization and within its environment, to be more diverse, inclusive, tolerant, and collaborative. I describe the overarching conceptualization for how the workplace is nested in larger macro-level arenas, and then focus on the competencies leaders can advance within these workplace spaces.

The following is an invitation to see workplace well-being and optimal performance from a bigger picture lens – a planetary view. In this view, optimal performance in the workplace is aligned with an understanding of well-being and success for which we all have the right. Success, in such sense, “comes from an inner measure of experience in the giving and planting, even when the harvest is delayed” (Krause, 2012, p. 4). The planting we might consider earnestly and intentionally

involves cultivating and growing our inner world, such as through mindset and worldview changes, the collective, such as through culture shifts, and what we do, such as through more mindful practices, embracing diversity, equity, and inclusion in the workplace. It is making these the fertile foundation for systems-wide and upstream well-being for what is needed for the health of all.

Why Planetary Health

“Planetary health” is a relatively new concept in western literature. Although featured strongly in traditional knowledges, such as Indigenous approaches for millennia, and discussed by the scientific community in the 1970s, it was first acknowledged in western thought and more comprehensively defined in 2015 by the Rockefeller Foundation. I offer planetary health as the over-arching concept to guide this discussion because it conceptually connects the individual to the planet (Prescott & Logan, 2019). “Public health” had previously dominated the discourse on macro-level health and well-being over the past two decades (Jamison et al., 2013). However, planetary health then expanded and broadened the term “public health” to be more inclusive of interconnected and interdependent facets to health, such as equity, the political, economic, and social. Similarly, Holst (2020) identified that our global health is established through social, economic and political determinants. The planetary health manifesto and the Rockefeller Foundation–Lancet Commission on Planetary Health defined planetary health as:

... the achievement of the highest attainable standard of health, wellbeing, and equity worldwide through judicious attention to the human systems—political, economic, and social—that shape the future of humanity and the Earth’s natural systems that define the safe environmental limits within which humanity can flourish. Put simply, planetary health is the health of human civilisation and the state of the natural systems on which it depends (2015, p.1978).

The Rockefeller Foundation–Lancet Commission (2015) identified three categories of challenges that have to be addressed to maintain and enhance human health. Firstly, conceptual and empathy failures; secondly, the failure to account for future health and environmental harms over present day gains and, thirdly, the disproportionate effect of those harms on the poor and those in developing nations. The field of planetary health recognizes human impacts on the environment, and specifically, the impacts that the exploitative practices initiated by colonialism and maintained by capitalism have on the natural systems of the planet, ultimately threatening human health. The Commission argued that “a population attains a given level of health by exploiting the environment unsustainably [...and as such] it is likely to be doing so at the expense of other populations—now or in the future, or both” (2015, p. 1978). Exclusion, and exploitation occurs on multiple levels. Planetary health literature most often references exploitation of the planet’s resources for profit and the challenge of climate change. Yet, exploitation has occurred through socially, economically, and politically disenfranchising people, too. Colonizing and

exploiting peoples for social, economic, and political gain and dominance has occurred along similar approaches to colonizing and exploiting the planet and its resources. Hence, it is impossible to talk about optimal performance without considering how the well-being for all is attended to within all spheres, including the organization or workplace. It is erroneous to talk about creating human health in relation to environmental health without considering human health in relation to diversity, equity, and inclusion at all levels. The workplace is a key level where change must happen, without which overarching change will not sustain itself.

Macro-level change must consider the realms of the social, political, and organizational and, hence, this chapter seeks to offer an opportunity for thinking and the steps needed to create planetary health from the grassroots up, inclusive of and central to the discussion – the workplace. When considering all these determinants, it is imperative also to identify the power relationships within those realms that are established and maintained. In addressing power relations and imbalances, it is important, then, to include empowerment of marginalized voices and advance practices for decolonization, thereby promoting well-being, optimal performance, and planetary health. In this way, planetary health is also an approach to life which attempts to address inequalities, with the objective that all people on the globe have the ability to enjoy health and well-being (Gostin et al., 2018), and leave no one behind (Holst, 2020; UN Committee for Development, 2018). As such, it is essential to recognize the interconnections and interdependencies between political, social, and environmental discourses in shaping human perceptions, decision-making, and behavior. We can change course from a trajectory of marginalization and colonization, in its old and modern forms, through decolonization and transformation of systems for greater equity and inclusion at the organizational level, in essence setting course for a renewal.

The Lancet Commission identifies the importance of changing human behavior as the connection to human progress and wellbeing, to which it specifies how the grassroots matter (2015). It calls for the protection of biological and cultural diversity, promotes funding for interdisciplinary research on threats to human health and ecosystem integrity to improve accountability and decision-making, and aims to redefine growth and prosperity away from GDP toward measures that ensure a better quality of life for all (Whitmee et al., 2015; Prescott & Logan, 2019). The Commission has created opportunity to recognize how the grassroots can impact global health by not only protecting biological diversity but cultural diversity.

The above defines planetary health to offer a broader understanding into how important various parts of the system are and, therefore, the role the workplace can play to support our collective well-being and health. The below defines DEI and proposes a road map to embracing DEI for change from the grassroots or the workplace up to impact the health and well-being of all. In this change process, leaders can offer ways for individuals to play a significant role in transforming power relations in promoting and protecting well-being from the grassroots and organization level as potentially a fertile foundation for overall well-being, optimal performance, and planetary health. For such work, it is important to understand how power has been exercised to enable a growing gap between the rich and poor and the

conditions for exclusion of peoples based on gender, sex, race, ethnicity, color, religion, disability, or even way of thinking, as some examples. Planetary health, as such, offers an over-arching framework and understanding for how workplace well-being and optimal performance can be critical spaces for change.

Diversity, Equity and Inclusion

There is no one definition of diversity; however, diversity is often defined as the presence of differences within a given setting (Bowen & Blackmon, 2003). Diversity may be surface- or deep-level diversity. Surface-level diversity refers to observable attributes, such as, sex, age, or race, whereas deep-level diversity includes less observable characteristics, such as, one's beliefs, values, attitudes and culture (Mor-Barak, 2016; Philips & Loyd, 2006; Roberson, 2019; Stephenson et al., 2020), or in thinking, as a colleague, Guy Nasmyth, emphasizes. These are characteristics that make individuals unique and distinct (Ferdman, 2017; Roberson & Perry, 2021; Shore et al., 2018). Furthermore, as mentioned above, identities may include various forms of intersectionalities, comprising of, for example, gender, sex, sexual orientation, race, ethnicity, color, disability, or religion. It is important to note that identity or identities can also shift depending on where individuals locate themselves in relation to potentially multiple identities. At some time, particular identities will become more salient and then, depending on various variables, shift.

Equity is also a term that is often used without agreed upon definitions. Equity is not to be confused with equality. In general, it refers to an approach that ensures that everyone has access to the same opportunities. Fiske and Ladd (2004) define equity as comprising equal treatment for all races, and discuss the term in regards to equal educational opportunities. Equity is the fair and just treatment of all members of a community (Smith & Gorard, 2006). People have different starting places and as such equity is an approach to ensure that all people have the opportunity to develop, participate, be heard, and contribute, regardless of their identity/ies.

Diversity and inclusion are often referenced as interchangeable terms (Shore et al., 2018). However, they are not one and the same thing, and although broadening diversity in the organization is one essential step towards an organization's health or well-being, it is not enough. Workplaces need to go beyond recognizing the significance of diversity (Roberson & Perry, 2021). A focus on diversity can, in fact, serve to establish difference rather than a sense of belongingness with uniqueness (Roberson, 2006). Inclusion refers to the intentional, ongoing effort to ensure that diverse people with different identities can fully participate in all aspects of the organization, including leadership positions and decision-making processes (Mor-Barak, 2015; Randel et al., 2018; Shore et al., 2011). Inclusion, importantly, means contributing without assimilating to established norms or relinquishing any part of one's identity (Ferdman & Deane, 2014). As such, it refers to the way that diverse individuals are welcomed in an organization and/or community and valued and respected. Inclusion is a basic human need (Maslow, 1943) and right and thus it is

the measure of a workplace's success (Mor-Barak, 2015; Randel et al., 2018). Myers stated that “[d]iversity is being asked to the party. Inclusion is being asked to dance” (Verna Mayers Company). Furthermore, being asked to dance means relationship building is of essence. Roberson and Perry (2021) highlight the importance of relational leadership—“specifically, relating to, showing a genuine interest in, and generating trust from others” (p. 1).

A Framework to Guide Change from within the Workplace

A framework can help map how change happens or can happen. Some frameworks tend to offer short-sighted direction where outputs matter most without considering the impact of various variables. Others, stemming from evaluation-related practice, offer short-, medium- and long-term outcomes to achieve an intended impact. Yet, while a stated impact or mission may serve to guide DEI/JEDDI work, leaders also need to consider change processes that work for the context or organization, given its unique mix of diversity, history, geography, purpose, sets of challenges, maturity, place at which tolerance to inclusion might exist, political landscape in which the organization is embedded, economic capabilities and economic context, and various social issues, to name some considerations. Hence, the process must occur through much reflection along the way around whether a plan is working and what conditions need to be taken into consideration, as they exist or emerge. I offer below some strategies from a broader systems awareness.

The goal is to provide a process for leaders strategizing or thinking through how to effect change, or impacts. I suggest this process includes well-being within the workplace (short-term outcomes), optimal performance (medium-term outcomes), and planetary health (long-term outcomes). Changes are cyclical, meaning that when change happens, for example at the macro, planetary health level, those changes impact the workplace, or grassroots level. As such, while change may be focused on the workplace or space level, change ought to be focused on other levels or wherever the leverage points may be in the system, for optimal impact (Wheatley, 2005). A change process can be represented in a visual diagram, as a narrative, and usually both.

In applying systems thinking using an integral framework, I seek to offer a leadership solution to shift mindset, examine values, our behaviors, practices, and competencies, workplace culture and eventually influence the broader systems that colonize and hold practices in place that lead to inequity and inequality. To be successful, DEI initiatives must be holistic. In his work, Wilber (2001) presents an integral, chronological map of evolution of the individual, society, and the biosphere. He defines a framework based on what he refers to as all quadrants, all levels, all states, and all lines (AQAL), through perspectives from religion, psychology, sociology, and Eastern and Western philosophy. He offers that this perspective is, quite simply, everything we know (Wilber, 2001). The utility of such an integral framework is it situates progressive concepts within a larger transdisciplinary web

<p><i>The interior of the individual (I)</i></p> <ul style="list-style-type: none"> ▪ Understanding ▪ How we organize reality, make meaning of the world, reason (action logics) ▪ Values ▪ Subjective process of inquiry ▪ States of being <p>INDIVIDUAL MINDSET/VALUES</p>	<p><i>The exterior of the individual (IT)</i></p> <ul style="list-style-type: none"> ▪ Actions ▪ Skills ▪ Techniques ▪ Roles ▪ Background ▪ Performance <p>COMPETENCY/BEHAVIOR</p>
<p><i>The interior of the collective (WE)</i></p> <ul style="list-style-type: none"> ▪ Shared worldviews ▪ Values we hold (i.e. belonging, trust, reciprocity, tolerance, collaboration) ▪ Process of participation and inclusion <p>COLLECTIVE CULTURE</p>	<p><i>Systems & structures (ITS)</i></p> <ul style="list-style-type: none"> ▪ Rules ▪ Policies ▪ Laws ▪ Economic, social, political structures ▪ Paradigms <p>ENVIRONMENT/SYSTEMS</p>

Fig. 16.1 Integral AQAL theory of change model for DEI

of ideas, which includes culture, psychology, philosophy, and science (Murray, 2009). An integrally or holistically oriented change process would serve to bring together knowledges towards a transdisciplinary and holistic lens including the different dimensions. Such a change model enables leaders a process for how to address issues related to diversity, equity, inclusion, individual health, and wellbeing as connected to the wider systems of planetary health.

As can be seen from this map, the integral model helps reveal and track (a) the internal spheres of the individual where bias resides, (b) the collective or culture, (c) the behaviours and competencies and (d) the macro-level systems or environmental drivers and structures. Each quadrant influences the other; hence, this model’s influence is not to be seen as linear given that environments are dynamic systems influenced by different starting points, such as the values (LL), policies (LR), and practices (UR) of an organization and enacted by people at all levels (Ferdman & Davidson, 2002).

In considering the internal sphere (a), the change process that address DEI sustainably, as such, begins with the self or individual, as in the individual’s awareness, states, perceptions, mindset, and worldviews. One cannot lead others without the capacity to lead oneself first. What this entails is a recognition that individuals are on different consciousness levels that require development “from pre-conventional to conventional to postconventional. . . . The mature adult of postconventional awareness meets the world on its own terms” (Wilber, 2001, pp. 21–22) and that “each unfolding wave of consciousness brings at least brings the possibility for a greater

expanse of care, compassion, justice, and mercy” (p. 22). In considering the collective or culture (b), it is important to recognize that the specific nature of the relationship is socially constructed through interactions (Uhl-Bien, 2006). From this perspective, Robertson and Perry (2021) emphasized, “building environments in which members share and build on each other’s ideas freely and leaders make time and space for leveraging member contributions for decision-making, even when such contributions diverge from team norms” (p. 1).

In considering the behaviors and competencies (c), Sashkin (2012) argued individual leadership behaviors are so important because leaders model their personal values and beliefs through their behaviors. In fact, Sashkin (2012) argued behaviors are the tools through which leaders can demonstrate their visions to followers. Randel et al. (2018) proposed categories of behaviors to be able to support diversity and inclusion. These were behaviors that make group members feel comfortable and supported, support fair and equitable treatment, provide opportunities for shared decision-making, encourage different perspectives and approaches, and reduce barriers to participation.

In considering the environment, systems, and larger structures within and outside the organization that impact upon the capacity to embrace DEI include governance, laws, or policies, that are historically embedded in social and political systems that have over time determined how these laws or policies have been fashioned. Consequently, systemic change requires questioning the very ideologies and world-views that have served to preserve current power structures and barriers to justice, access, inclusion, and equity (Zampella, n.d.). Integrating these perspectives allows one to approach the work of diversity, equity, and inclusion, as well consider justice, decolonization, and renewal. This hard work, I argue, must embrace leadership practice from a holistic perspective, in other words, one that is integral. Integral

means to integrate, to bring together, to join, to link to embrace. Not in the sense of uniformity, and not in the sense of ironing out all the wonderful differences, colors, and zigs and zags of a rainbow-hued humanity but in the sense of humanity-in-diversity, shared commonalities with all our wonderful differences (Wilber, 2001, p. 2).

The following offers a strategy to map change for the workplace, as one critical sphere to evolve change for the macro-global level from the bottom up. To reiterate, to be successful inclusion must be holistic and include all levels of existence from the micro to the macro.

Individual Mindset/Values

There are several ways to start the development-oriented change process. In the quadrant located on the upper-left (UL) of the diagram above is a list of areas to consider, as first starting point. Part of motivating a process for change at the individual level, or self in systems, includes decolonization of mindset. It includes

peeling back layers of bias, and letting go of old ways of thinking that do not allow for new understanding, knowledge, and insight that are at higher levels to those one currently holds. Although tolerance is fundamental, it may be a value that an individual has yet to embrace. If one is living the value of tolerance of others who are different, perhaps the next leadership stretch is learning openness. However, any strategy for or initiative for developing greater DEI in the workplace must critically start with where individuals are at.

We might consider where we are at with each item as first aspect of a reflective practice. We might then consider where we can best grow or what aspects we ought to develop further. This could simply mean considering what further lenses or perspectives we can add to our existing list. This might mean considering which we would rather transcend, or even shed light on to understand better and change. For example, considering the values we hold, if trust is not present, we may well consider developing trust. If a divisive worldview is one that typically colors our lens and by no coincidence we tend to use divisive words to describe people or the world, we may want to transcend a binary worldview by adding on more perspectives or learn to be less judgemental and more tolerant, accepting, and inclusive. Consequently, we can take an inventory of what our values are; that is, the ones that typically determine the way we see ourselves, others, and the world, and make changes to them.

The individual is embedded in systems, whether familial, organizational, political, or economic. From this point in the model above, one can recognize that our behaviors have impact and influence systems that we are a part. Power relations are exercised across groups and hence it is important to understand to what degree we, individually, hold and can wield power. It is important to recognize the responsibility we have to peel back the layers of bias from which we see and interpret the world. It is from here we re-define our personal values, to then add our voice to the collective (lower-left quadrant – LL) to promote justice. A change process is embracing strategies for empowerment of under-represented peoples in these spaces. It is also from here where we can choose to re-evaluate our practices and choose new behaviors (upper-right quadrant – UR), aligned with creating a just world through policies, the legal systems, economic, political, and social structures (lower-right – LR). Through changing thinking, consciousness, worldviews (UL), and our choices, and practices (UR), we are able to shift collective value systems (LL), and promote human and planetary health (LR).

Guiding questions to begin this discovery may include:

- How is diversity, equity, and inclusion understood by individuals within the workplace? How do I understand these?
- To what degree do individuals believe the workplace is diverse, inclusive, and equitable?
- To what degree is DEI/JEDDI important as an individual value?
- Who is being excluded in this discovery?
- What are the areas related to DEI/JEDDI that individuals believe need greater attention and work?

- What would an ideal workplace look like here regarding DEI/JEDDI and well-being?
- What is needed to support better individual capacity to support initiatives for enhancing DEI/JEDDI for the marketplace, or those impacted/potentially impacted by the organization?
- What do I not know about DEI/JEDDI and the needs of marginalized people in my organization, and how/through whom may I learn what I do not know?

Before strategizing how to set direction, leaders need to understand the current state of their workplaces, regardless of how other organizations are doing with respect to DEI or JEDDI. They need to take the first steps by articulating the importance of DEI and by taking a position of support towards greater DEI or JEDDI. At the same time, leaders need to consider how their own identities, intersectionalities, values, background, experiences, power, privilege, unconscious bias, and even triggers may affect this discovery phase, their approach, and effectiveness.

Collective Culture

The workplace, as one form of the collective, is located within the lower-left (LL) quadrant above. Collectives can be families, communities, networks, or various forms of organization, whether located in the theoretical private or public spheres. From this general space, we can consider what the collective or rather the dominant values guiding the culture might be. For our purpose, from here we can seek to ascertain the degree diversity exists, perhaps in relation to society. We might try to understand the degree of belonging individuals express they have in the organization in question. We can explore the degree to which individuals feel they have equal access or rights through inquiry. We might also look to leaders within the organization. Bass (1998) argued that a culture shift must be first articulated from leadership. The first step is observing, asking, and listening. Although best practices in other workplaces may inform the work needed, it is important to inquire into the needs and current state of the workplace in question before seeking to adopt any idea of best practice.

Guiding questions may include:

- To what extent can workplace diversity be ascertained and based on what criteria?
- What types of diversity are observed and identified within the organization or across parts of the organization?
- How is diversity currently addressed in the organization's stated values?
- Do some individuals feel less of a belonging and, if so, why?
- What are the barriers to feeling that one is part of this whole?
- What does inclusion mean for the workplace? What steps may be implemented towards enhancing inclusion?
- What does health and well-being mean to the collective?
- How may physical space be created for all to feel invited and welcomed?

- How might individual participation and engagement with one another be enhanced, so that no one is left behind?
- How can the workplace engage with other groups or institutions outside the organization to create safer, more equitable spaces?

These questions are meant to offer the opportunity to strategize change not only within the LL quadrant but from the LL quadrant with the other three quadrants. It is a good first step to collectively seek to establish a definition of diversity. This definition goes beyond recognizing only a few groups to recognizing the multitude of ways people are diverse and how intersectionality informs how individuals and groups experience marginalization. It is important to identify how power is exercised from the top down and the power relations that exist across groups. It is also essential to acknowledge to what degree we as individuals hold and can wield power. Constraints may be located within mindsets and biases, the actions people take, or the structures, policies, or rules, formal and informal, of the organization. A scan of how each of the three quadrants (UR – actions, UL – biases, and LR – structures, policies, and rules) can reveal where our leverage points exist within the broader system to inform how to create shifts across the system in which the workplace is embedded.

Competencies and Behaviors

Individual actions, as can be located within the UR quadrant above, can contribute to an atmosphere supportive of DEI in the workplace. From this space, we can consider what power we have to take action and what actions we are in fact taking to create a workplace that is welcoming and inclusive of diverse perspectives and people. Here we can consider to what degree equity can be ascertained in rights, responsibilities, training, or various opportunities.

Guiding questions may include:

- What competencies do individuals have around DEI/JEDDI?
- To what degree is individual well-being a value and how is individual well-being promoted?
- What are the skills needed to advance a workplace ethic of inclusivity?
- What can leaders do better in way of advancing DEI/JEDDI?
- How can individual well-being impact this organization's performance?
- What steps can individuals in the workplace take to advance DEI/JEDDI and overall well-being in the community the organization serves?

By exploring the specific actions, skills, competencies, or roles in this sphere, leaders can better understand how to leverage and action change. From these insights, leaders can be in a position to identify the most relevant leverage points or opportunities for change or the roles that may need to be filled to do so. Realistically, those that are most needed or where there is greater opportunity for shifts might well be addressed first. This means that only a few strategic actions might be considered in

a first phase to be able to get buy-in and traction before iterating and contemplating what the next phase might best entail.

Environment and Systems

Broader systems drivers may be identified in the LR quadrant, as described in Fig. 16.1 above (see also Krause, 2021). These may include, for example, the rules, the policies, the laws, the economic, social, and political structures of the country/countries in which the organization exists or serves, or other overarching global determinants, such as climate change or pandemics, as well dominant or other forms of globalization. Considering such systems helps with strategizing what kinds of influences to anticipate, navigate, or address. Some drivers may seem to have little influence but are or will become key considerations for DEI/JEDDI initiatives. For example, a pandemic may create greater inequalities and gaps between rich and poor or access to essential services or other basic rights. DEI/JEDDI initiatives might need to consider these contexts for identifying which groups or individuals may become further isolated or which may become more vulnerable. We can consider how disparities can be addressed and equity enhanced through the changing of rules, policies, laws, or what the existing negative macro-level drivers are on marginalized communities, groups, nations, or regions, and why they exist. Essential, too, is to identify what systems are keeping those privileged in such places. From this quadrant we might also consider the historical specificities that have created contexts of systemic racism and marginalization.

Guiding questions may include:

- What does collaboration between other sectors and entities look like currently?
- What policies, structures, or changes in the environment can offer better capacity for diversity to be embraced and enhanced within the workplace?
- What are the overarching barriers in the political, social, or economic contexts to equity experienced in the workplace?
- How democratic and inclusive is the environment in which the organization operates?
- How does the environment impact to what degree various individuals and groups feel free to express themselves or their ideas in the workplace?
- What are the factors that influence the existence of the dominant culture/s?
- How can the workplace engage with other groups or institutions to create safer, more equitable spaces in this larger context?

Exploring the broader context is meant to ascertain the impact of macro level drivers on well-being of individuals and groups in an organization. Researching and inquiry into macro level drivers and dynamics also allow for understanding how leaders in the organization might consider addressing those drivers that serve to widen the gaps of inequity or serve to exclude and repress groups while potentially also privileging others. Such analysis can provide insights into how to shift systems towards greater inclusion, equity, and sense of well-being.

Conclusion and Key Chapter Takeaways

This chapter offers a framework for embracing DEI (and JEDDI) in view of creating greater well-being and optimal performance in the workplace and for identifying how shifts towards greater diversity, equity, and inclusion might be created. This chapter offers five key takeaways for workplaces, whether for-profit or non-profit, locally oriented, or global, as well government, activist, or educational. The examples of inquiry questions are only to provide ideas for exploring how to create diverse, equitable, and inclusive ways of seeing, being, and practice. The takeaways of this chapter are as follows:

1. Through the creation of DEI/JEDDI initiatives within workplaces, organizations can play a key role in creating safer, more equitable, and inclusive spaces where individuals might, as a result, experience a greater sense of well-being. Such can lead to optimal performance of the organization.
2. Creating DEI/JEDDI initiatives within workplaces is a foundation for the creation of planetary health, given that the health and well-being of all supports the enhancement of health and well-being in the larger, macro-level, socio-economic and political spaces, and given that all is connected, from systems and traditional knowledge perspectives.
3. A holistic lens to EDI/JEDDI in the workplace is critical for a sustainable and effective path to equity and inclusion. Such can be served by applying the Integral framework. This framework allows one to map change from the individual to the collective to the macro-level spaces.
4. Organizational leaders, therefore, require the systems thinking and practical steps for implementing DEI within their organizations for positive impact on the larger social and planetary systems.
5. No one perspective, whether the subjective, culture, behavioral, or systems, alone can be sufficient to addressing DEI/JEDDI.

Reflective Questions

1. Why is focusing on leading change beginning with the self a critical first step to DEI/JEDDI initiatives?
2. What are some key examples of actions and behaviors that align to DEI/JEDDI initiatives and what two further examples might be added?
3. What are some examples of how one might shift a hierarchical culture in which groups are marginalized and racialized?
4. What political, cultural, economic, or environmental drivers might impede the workplace's ability to shift to greater equity and inclusion and how might these be navigated?
5. What is the relationship of DEI/JEDDI initiatives within the workplace to planetary health?

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