

# BUILDING INCLUSIVE WORKPLACES

Assessing  
the evidence

Research report  
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## Research report

# Building inclusive workplaces: assessing the evidence

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## 1 Foreword from the CIPD

Positive change on inclusion can only come about through concerted, meaningful and intentional action. At the CIPD we know that while the business case for diversity and inclusion is useful, financial outcomes are not the ultimate goal for inclusion at work. Creating shared value and distributing it to various stakeholders in its different forms is more important than driving business performance for financial stakeholders alone. If organisations are to achieve fair and sustainable forms of work that benefit all stakeholders (workers included), we need to locate inclusion at the centre of strategy and practice. It's therefore crucial that people professionals help leaders in their organisations to move beyond bottom-line thinking and instead consider a very real and achievable alternative that works for all stakeholders, workers included: the triple bottom line in which workplaces are fair, transparent and inclusive.

Making this future a reality requires real commitment to change and tangible investment in improving management practices and capability. It also requires a long, hard look at the practices people professionals lean heavily on to understand if they really are inclusive, and an assessment of what must be improved if we're to create more inclusive workplaces. Being evidence based is a key way for people professionals to ensure that the work they do is more likely to create positive outcomes, and does not unintentionally harm or exclude oppressed groups from good-quality work. Ultimately evidence must be the basis of decisions we make in the profession, and this should be apparent nowhere more so than in the inclusion space.

In this research we assess the evidence on important questions relating to workplace inclusion, to better equip people professionals to truly deliver change and support their organisations to transform for the better. We hope this research supports practitioners to build their knowledge and expertise and enables them to deliver lasting change for their organisations and the many stakeholders they serve every day.

**Edward Houghton**, Head of Research and Thought Leadership, CIPD

For a summary of this research report, visit the [Building inclusive workplaces webpage](#) on the CIPD website.

## 2 Introduction

### Making the case for inclusion

A focus on workplace diversity and inclusion (D&I) has undoubtedly led to progress in tackling workplace inequality in recent decades. For example, the gap between female and male employment rates in the UK is the lowest since it was first recorded in 1971,<sup>1</sup> meaning the UK workforce is more gender-diverse than ever.

On the other hand, FTSE 100 CEOs in 2018 were more likely to be called Dave or Steve, than be female,<sup>2</sup> meaning male and female experiences of workplace progression aren't equal. And, gender is just one aspect of diversity. One piece of research highlights that if the current rate of progress remains the same, FTSE 100 companies won't meet targets for BAME board representation until 2066.<sup>3</sup>

Clearly, more needs to be done to make workplaces inclusive as well as diverse. Increasing representation for minority groups is not a panacea to these issues. Businesses must tackle barriers to equality, such as poor progression prospects, bias (both conscious and unconscious), over and above complying with legislation, to make real change. However, in previous CIPD research, *Diversity and Inclusion at Work: Facing up to the business case*, we identified a lack of robust evidence on how to meaningfully address barriers to equality.<sup>4</sup>

Inclusion is considered to be the missing piece of the puzzle. An inclusive workplace culture allows all people to thrive at work, regardless of their background, identity or circumstance. However, how an inclusive organisation is developed, and what inclusion really means in practice, is less clear.

This research explores scientific literature on this topic to better define inclusion, understand how inclusion relates to workplace outcomes and, importantly, how people professionals, line managers and business leaders can contribute to the development of more inclusive workplaces.

#### Box 1: Diversity, equality, equity or inclusion?

Diversity refers to demographic differences of a group – often at team or organisational level. Often, diversity references protected characteristics in UK law: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation. CIPD members can find information on the legislation in relation to these characteristics in our topic pages and factsheets.<sup>5</sup>

*Equality* means equal rights and opportunities are afforded to all. The 2010 Equality Act in the UK protects those with protected characteristics from direct and indirect discrimination in the workplace.<sup>6</sup>

*Equity* recognises that treating everyone equally has shortcomings, when the playing field is not level. An equity approach emphasises that everyone should not be treated the same, but according to their own needs.

*Inclusion* is often defined as the extent to which everyone at work, regardless of their background, identity or circumstance, feels valued, accepted and supported to succeed at work. This report explores this definition in more detail, to understand what inclusion means in practice, and how it might be assessed.

### A numbers game?

A focus on increasing diversity at work is undoubtedly positive for individuals, and wider society. The economic case for more diverse workplaces is clear; research from the US shows that participation of women in state-level labour markets is linked to wage increases for all,<sup>7</sup> and in the UK, research identifies that full representation of BAME individuals in the labour market would reap benefits to the tune of £24 billion.<sup>8</sup>

This emphasis on diversity has perhaps been in part due to the focus (in both research and practice) on building the business case for diversity.<sup>9</sup> Along with progressive policy-making and changing societal norms, this case has highlighted the importance of taking action on diversity. However, the focus on the traditional business case – that diversity increases business performance – is conceptually limited.

First, it's important to note that at individual level, being able to access and succeed in work, regardless of background and circumstance, is a basic tenet of equality, which employers have a responsibility to champion regardless of potential return on investment for diversity programmes. (For a discussion of the terms used in this report, see Box 1.)

Research also shows that the link between diversity and performance is highly dependent on context.<sup>10</sup> As one author puts it, '*simply representing a greater variety of differences in an organization or group is not a magical path towards greater performance*'.<sup>11</sup> In other words, having a diverse workforce is a good start, but there are other important factors that influence workplace outcomes, such as employee experience and organisational context.

Finally, the business case isn't always effective in galvanising employers to make systemic changes that tackle barriers to inclusion and equality. It focuses on moving the dial on diversity numbers, but not on systemic change.<sup>12</sup> Increasing diversity through targeted recruitment, for example, is unlikely to tackle the underlying causes of a lack of diversity.

### From diversity to inclusion

Positively, inclusion is increasingly seen as a key driver of progress towards workplaces where everyone can thrive, recognising that workplaces aren't inclusive for everyone.<sup>13</sup> Indeed, employees in the same company can experience the workplace differently depending on their line manager and team, but also background and circumstances.

*It's clear that, as well as employing inclusive practices, different perspectives, beliefs and norms must be valued by an organisation and its leaders and employees for a diverse workforce to thrive. How best to make this change is less clear.*

For example, recent figures from a survey of over 100,000 LGBT people in the UK found that '*23% had experienced a negative or mixed reaction from others in the workplace due to being LGBT or being thought to be LGBT*',<sup>14</sup> and a CIPD survey of BAME employees found that BAME employees were more likely to say identity of background can impact the opportunities given at work.<sup>15</sup> More broadly, findings from the CIPD *UK Working Lives survey* highlight that 22% of employees feel that other team members would judge others for being different.<sup>16</sup>

These findings highlight that focusing on diversity alone could even be counterproductive as it doesn't address the systemic challenges to workplace equality and inclusion, such as workplace culture. It instead puts underrepresented, or less 'powerful', groups in harm's way, potentially doing more harm than good.

Inclusion, then, might be a better starting point for organisations wanting to increase diversity. For example, a survey of business leaders and HR professionals found that less inclusive organisations are more likely to fail to be making changes off the back of gender pay gap reporting and cite senior leadership support as a barrier to the success of ethnicity pay gap reporting.<sup>17</sup>

It's clear that, as well as employing inclusive practices, different perspectives, beliefs and norms must be valued by an organisation and its leaders and employees for a diverse workforce to thrive.<sup>18</sup> How best to make this change is less clear.

### Understanding and taking action on inclusion

Inclusion is a promising idea; allowing everyone to be included and supported at work, regardless of their background, makes sense for businesses and employees. But what do we mean when we say an organisation is inclusive? Is it about people management practices, employee experience and organisational values, or a combination of these factors?

Without clarity on what inclusion means, taking targeted action in organisations is challenging – and, there is a risk that inclusion initiatives are rebranded diversity initiatives that don't fully address barriers to inclusion.<sup>19</sup> Addressing these barriers requires businesses to reflect on their culture and practices, and employee experience more broadly. This lack of clarity also makes it challenging to measure progress and evaluate the success of inclusion strategies.

This report explores the scientific evidence on inclusion and inclusive practices and provides guidance for people professionals, business leaders and line managers to measure and improve inclusion in their workplace.

## 3 Research questions and methodology

### Research questions

We conducted a literature review to answer the following questions:

#### 1 What is inclusion and what impact does it have on workplace outcomes?

Inclusion is an increasingly popular term, but a nebulous one that's used across disciplines; for example, it can mean basic access to the labour market, participation in politics or education – we therefore need clarity on what inclusion is at an organisational level.<sup>20</sup>

Workplace inclusion is not clearly defined, although it is often referred to alongside diversity and equality (see Box 1 for a discussion of these terms). Some definitions are broad, and concern whether employees feel like organisation 'insiders',<sup>21</sup> and others suggest that inclusion is a way to allow diverse workforces to thrive.<sup>22</sup>

In this report, we explore scientific evidence to understand inclusion theory, and we clarify workplace inclusion practice, and how it relates to workplace outcomes.

#### 2 How can organisations assess inclusion?

To effectively build more inclusive workplaces, organisations need to understand the current state of play and take targeted action. This includes assessing whether employees feel the workplace is inclusive, and whether people management and HR practices themselves are inclusive. We highlight the measures that organisations can use to do this.

### 3 Which behaviours, practices and organisational values build workplace inclusion?

Finally, if organisations want to become more inclusive, it is important to understand the behaviours and people management practices that support inclusion. For example, research has identified the key role that leaders play in creating inclusive workplaces, through a variety of competencies.<sup>23</sup>

In this report, we outline the scientific evidence on the behaviours, values and practices that organisational leaders, people professionals and managers need to know about in order to create an inclusive environment.

#### Literature review method

Previous CIPD research highlights that empirical, randomised and controlled studies into the outcomes of inclusion are scarce.<sup>24</sup> While randomised experimental research is most appropriate when making causal inferences (does x cause y, and under what conditions?), other research methods can aid our understanding of inclusion and highlight emerging findings.

This research report is based on a literature review of peer-reviewed, scholarly articles relating to inclusion and inclusive organisational practices. We include both theoretical and empirical findings, and further detail on the methodology is available in the Appendix.

In the following sections we explore what inclusion looks like in theory and practice, and how it might enable better outcomes for employees and employers. We also highlight research evidence on how inclusion can be assessed, providing recommendations for people professionals and business leaders wanting to assess inclusion in their workplace. Lastly, we explore the evidence on the behaviours, practices and values that need to be in place to build inclusivity. We conclude with some critical considerations for D&I strategy development in light of our findings.

## 4 Understanding inclusion: theory and outcomes

### Key findings

- Workplace inclusion is defined in a variety of ways, and can be understood from an organisational and individual perspective.
- At an individual level, workplace inclusion relates to feelings of belonging, having a voice and being valued for your unique and authentic individual skills and abilities.
- In turn, this is linked to positive team outcomes, reduced absenteeism and enhanced job commitment, suggesting that inclusive behaviour allows individuals to work together effectively and creates a healthy environment for employees.
- At an organisational level, workplace inclusion involves valuing difference, allowing all employees the opportunity to develop, participate and use their voice to effect change, irrespective of their background.
- In turn, this has been linked to, and is associated with, enhanced team knowledge-sharing, innovation and creativity.
- While some theories of inclusion reference diversity and demographic characteristics, inclusion and diversity are separate but related concepts. While there are particular barriers to inclusion for certain underrepresented groups, inclusion is about employee experience, and is relevant for everyone.



While ‘inclusive organisation’ has become something of a ubiquitous term in the profession, it’s a concept that requires greater exploration, given that inclusion tends to be referenced implicitly in studies about diversity and inequality in organisations, and is rarely addressed explicitly.<sup>25</sup>

Nevertheless, organisations are now moving away from common diversity management practices, such as targeted recruitment initiatives, and are instead adopting broader programmes, including employee participation and internal communications, in order to become inclusive. However, it is unclear whether this change represents a significant shift in organisational actions and outcomes, or simply a change of rhetoric, aimed to reduce backlash against targeted initiatives.<sup>26</sup>

There is also a lack of consistency in how academic literature operationalises inclusion.<sup>27, 28</sup> Is inclusion about individual perceptions of belonging and feeling included, or is it about an organisation’s ability to employ practices that allow everyone to progress and develop, or a combination of the two?

In this section, we examine these two approaches, considering what inclusion feels like to individuals, before then defining an ‘inclusive organisation’. We also examine the key workplace outcomes associated with inclusion.

### Individual-level inclusion

Theoretical research on individual-level perceptions of inclusion at work has roots in philosophy and social psychology that explore how people relate to one another, and how we make sense of our environments through the relationships we have with others. We outline these theories below, before exploring how the research evidence identified in our literature review builds on these theories.

#### The philosophical underpinnings of inclusion

Inclusion is spoken about in a variety of disciplines. To understand the philosophical basis of inclusion, we consider the work of Emmanuel Levinas, a major influence in twentieth-century philosophy. In his most influential work, *Totality and Infinity*, first published in French in 1961, he argued that the foundation of existence was the reciprocated face-to-face relationships between living beings.<sup>29</sup>

This ‘face-to-face’ is not about being embraced and incorporated into another’s world view, but a demand to be acknowledged as an equal. People remain as ‘other’, not by being excluded, but by being recognised and respected as an individual. Denying them a valid ‘otherness’ is thus dehumanising and the opposite of inclusion.

Various scholars have drawn on Levinas’s work to develop thinking in contemporary equality, diversity and inclusion.<sup>30, 31, 32</sup> His theory sheds light on how inclusion relates to diversity in representation as processes that uphold equality. Inclusion, diversity and equality are inextricably linked. As Levinas put it:

*Equality is produced where the other commands the same and reveals himself to the same in responsibility; otherwise it is but an abstract idea and a word. It cannot be detached from the welcoming of the face, of which it is a moment.*<sup>33</sup>

However, there may be a degree of conflict between inclusion and diversity and how these concepts are enacted in practice. Thinking about diversity as a set of protected characteristics (in the UK, sex, race, disability, age, sexual orientation, and religion or belief) could constrain inclusion. ‘Fraternity,’ argued Levinas, ‘is radically opposed to the conception of a humanity united by resemblance, a multiplicity of diverse families.’

Muhr<sup>34</sup> argues that the tension between *'finite categorical differences and infinite noncategorical otherness'* is inherent in diversity. Specifically, she argues that *'creativity in organisations depends not on "managing" differences among people but on "respecting" otherness within them'* and that *'an ethical approach to diversity should shift attention from categorisation to the acknowledgement of individual differences'*.<sup>35</sup>

A lesson may be learned here from the sexual orientation and gender identity movement. The lists of LGBTQ, and especially expansions such as LGBTTTQQIAAP (lesbian, gay, bisexual, transgender, transsexual, queer, questioning, intersex, asexual, ally, pansexual), are sometimes derided for being unnecessarily long. But they embody the spirit of inclusion by reminding us that there is a multiplicity – indeed, an infinity – of diversity.

### The psychological underpinnings of inclusion

Social psychological theories build on the idea that we have a tendency to 'group' ourselves in social categories (whether that be a demographic characteristic like gender, or as part of a team – known as social identity theory). This means that people often try to evaluate the social situation they are in, and part of their evaluation is how they feel they 'fit in' to that group. In a workplace context, this could mean how employees evaluate themselves against the majority group in an organisation,<sup>36</sup> or how their experience of the workplace is influenced by their belonging to a particular demographic group.<sup>37</sup>

Inclusion, according to these theories, is rooted in feeling like we have a place in a group (whether that be a team or the wider business), while being able to be true to one's own identity. (For more on these theories, see Box 2.)

#### Box 2: The theoretical development of inclusion

There are several important theories of inclusion that illustrate how the concept has evolved:

##### Optimal distinctiveness theory

Originally conceived by Brewer (1991),<sup>38</sup> this describes tensions between a need for validation and similarity to others on one hand, and a need for uniqueness and individuation on the other. Individuals strive to balance this tension through finding an optimum level of inclusion within a group. Belonging comes through forming strong relationships with others, but people also want to be unique, and highlight their own individual traits.

##### Self-determination theory

This theory posits that at a fundamental level, humans need to feel connected to others (relatedness), while also being able to act in line with one's sense of self (autonomy).<sup>39, 40</sup> Later research has used the term *authenticity*<sup>41</sup> to more accurately represent this need. An inclusive group, then, allows people to feel connected to one another, while being oneself in an authentic way.

##### Team identity

Finally, team identity refers to an individual's feelings about their team. Often, when we feel part of a team, or group, we tend to evaluate that group favourably, and part of that is received value and respect from other team members.<sup>42</sup> However, team identity can be impacted by factors such as status or difference within a team. In an inclusive organisation, these factors need to be managed to ensure everyone has a voice.<sup>43</sup>

### Individual inclusion in the workplace

Building on these theories, Shore et al<sup>44</sup> suggest that understanding workplace inclusion is complex, and can't be understood on a continuum, with exclusion at one end and inclusion at the other. They highlight that feeling like part of a group might sound inclusive, but if an individual must conform or change themselves in some way to feel included, this is not true inclusion.

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Research indicates that there are several key aspects that contribute to individual inclusion. Individuals feel included when they perceive their unique identity to be acknowledged and appreciated as valuable.<sup>45</sup> Related to this, individuals must feel able to act authentically at work, without a need to cover their identity.<sup>46</sup> This, alongside uniqueness, helps individuals create a sense of belonging, rather than feeling a need to conform. See Table 1 for more information on these aspects of inclusion.

**Table 1: Key aspects of individual inclusion**

<b>Feeling valued for uniqueness</b>	Theoretical research suggests that teams or organisations that value uniqueness and difference and allow anyone to feel 'part' of a group are truly inclusive. In other words, a sense of belonging to a team must be coupled with a sense that different identities are valued. <sup>47</sup>
<b>The ability to be authentic</b>	Linked to this 'uniqueness', authenticity is thought to be a key aspect of inclusion. <sup>48</sup> In other words, individuals must feel like they can be themselves, regardless of whether they are different or share many similarities with their colleagues. Without this, individuals could feel like they need to engage in 'surface acting' or cover their identities.
<b>Belonging and non-conformity</b>	Feeling that one's unique abilities and difference are valued, coupled with an ability to be authentic, is thought to create a sense of belonging, without the need to conform to group norms.

While individual definitions of inclusion don't explicitly call out demographic diversity, organisations may need to consider both diversity and inclusion when they assess who feels like they are valued and can be themselves. Group dynamics and bias mean that particular groups may feel less included, or even excluded.

For example, one survey of managers in a US firm finds a link between inclusion, diversity and well-being (measured by absenteeism).<sup>49</sup> The researchers found that gender diversity is linked with absenteeism. However, this link was minimised in teams with high gender inclusivity. In other words, where team members were perceived to be open towards and appreciative of gender differences, less absenteeism occurred.

These individual feelings of inclusion, belonging and ability to be authentic will be influenced by the behaviour of others at work as well as informal and formal organisational practices. Next, we discuss what inclusion means at the organisational level.

### Organisation-level inclusion

Workplaces have a responsibility to promote inclusion; they make decisions on who is included, or excluded, from their organisation at the hiring stage and beyond – right through the employee lifecycle. Additionally, the hierarchical nature of the structure and management of the majority of organisations means that there may be inherent inequality between employees at different levels.<sup>50</sup>

However, inclusive people management practices can help to manage this tension and develop a climate of inclusion in organisations. These practices, both formal and informal, alongside positive employee behaviour and organisational values, help individuals feel like they are part of a team and can be themselves.

*Organisations highlight that fair policies and practices must be in place, facilitating opportunities for all employees to progress, participate and use their voice to have a say in matters that affect them. In turn, this allows everyone's perspective to be valued, with ideas being shared openly and effectively, irrespective of background, mindset or way of thinking.*

Models of inclusive organisations highlight that:

- Fair policies and practices must be in place,<sup>51</sup> facilitating opportunities for all employees to progress, participate and use their voice to have a say in matters that affect them. In turn, this allows everyone's perspective to be valued, with ideas being shared openly and effectively, irrespective of background, mindset or way of thinking.<sup>52, 53</sup>
- Employees should feel like they have agency in decision-making processes and important networks<sup>54, 55</sup> so that no individual is left wondering 'what about me?',<sup>56</sup> helping contribute to a sense of organisational belonging.
- Allowing everyone to have influence and actively taking feedback on board can contribute to improved, inclusive practices.
- Leaders must use their power to become role models for inclusion initiatives, rather than silencing them.<sup>57</sup>
- Finally, genuinely valuing individual differences is key – hiring for the sake of representation can be counterproductive if all team members fail to be valued<sup>58</sup> (we examine leadership behaviours that promote inclusion in more detail in section 3).

### What characterises an inclusive culture and climate?

The research literature highlights the importance of an inclusive culture and climate, recognising that policies and practices alone can't create an inclusive organisation. Organisational values, beliefs and social norms will all contribute to inclusion. Inclusion policies might be in place, but if the organisation doesn't value difference, or has a clear power imbalance, where only one group can get ahead, positive change is unlikely.<sup>59</sup> As mentioned earlier, the hierarchical nature of the workplace creates inherent inequality. Creating an inclusive culture and climate is key to addressing this.

Organisational culture is informally defined as 'the way we do things round here',<sup>60</sup> and, formally, shared values, beliefs and assumptions that guide behaviour and action.<sup>61</sup> An organisational climate, on the other hand, is widely defined as the meaning that people attach to certain features of the work setting.<sup>62, 63</sup> The way an individual understands their workplace guides their behaviour. Creating an organisational climate of inclusion requires

employees to attach meaning to their experience of work. Only when there is a shared belief in place that all employees are respected, valued and allowed to be themselves will an organisation be seen to have a truly inclusive climate.

One important model outlines the ‘founding principles’ for an inclusive diversity culture.<sup>64</sup> This model identifies recognising and appreciating difference, understanding the factors that may facilitate or prevent someone’s development, and building trust between groups, as key factors that need to be present for an inclusive culture (see more in Box 3).

Other research suggests that an inclusive climate is one that, first, minimises bias by ensuring that opportunities and resources at work aren’t influenced by group identity or demographic differences. Next, it enables people, regardless of their differences, to work together effectively and avoid stereotyping. Finally, it encourages employees to collaborate across social boundaries through joint problem-solving.<sup>65</sup>

### Box 3: Building an inclusive diversity culture<sup>66</sup>

Pless and Maak (2004) outline their ‘founding principles’ for an inclusive diversity culture:

- Recognition: encouraging emotional, legal and political recognition of difference, alongside solidarity, contributes to healthy relationships. People who feel recognised as different but equal, and feel able to be their true selves, are highly motivated and at ease, provided they experience solidarity from their peers.
- Reciprocal understanding as a result of communication and inviting in previously marginalised voices, while mutually enabling all to share their views and ideas: acknowledging that some have more access than others means that diverse groups with different ‘local realities’ are able to come together and create a shared identity and ensure what is right and wrong is reached through consultation.
- Trust: closeness and co-operation between and within groups need to be built, and integrity needs self-governance, demonstration of moral character and developing a culture of ‘wholeness’ that recognises diversity.
- An intercultural point of view, borne from the above principles: this is used in a moral sense to demonstrate the need for shared moral principles across and beyond cultural boundaries – whether these are set by gender, race, religion, language or other characteristics.

### What are the workplace outcomes of organisational-level inclusion?

What do organisations and employees stand to gain from building a climate for inclusion? Allowing all employees to have a voice, and feel like they are a valued part of an organisation, is simply the right thing to do. In addition, our review highlights how inclusive practices might influence workplace outcomes (for further details on the research findings below, see Table 2).

Inclusion and diversity are often linked in the scientific literature, with inclusion positioned as a factor to ensure diverse teams can work together effectively. For example, diversity is often thought to contribute to organisational innovation through better decision-making and knowledge-sharing. However, these outcomes will be limited if multiple perspectives are not considered in a team.<sup>67</sup> Research supports the idea that inclusion is linked with **team innovation, creativity**<sup>68</sup> and **knowledge-sharing**.<sup>69</sup>

Importantly, research links inclusion with positive outcomes in teams with surface- and deep-level diversity. Surface-level diversity is seen to generally include demographic differences, such as age or ethnicity, while deep-level diversity is defined as disparities in attitudes and beliefs.<sup>70</sup> This supports the idea that inclusive climates have broad impact that transcend typical ‘diversity characteristics’; inclusion is relevant for all employees.

In addition, survey data has highlighted the importance of inclusion on outcomes such as **job commitment and performance**, over and above having specific diversity policies and practices in place.<sup>71</sup>

Of course, **an inclusive working environment is important in minimising barriers faced by underrepresented groups in the workplace**. One piece of evidence highlights that inclusive team behaviours are linked to positive outcomes for people with disabilities at work.<sup>72</sup>

**Table 2: Inclusion and workplace outcomes**

Workplace outcome	Research findings
<b>Innovation and creativity</b>	Research drawing on Nishii’s (2013) <sup>73</sup> measure of inclusion climate supports this idea, linking individual perceptions of inclusion with enhanced team creativity in multicultural teams. The authors suggest that inclusion means that less ‘social categorisation’ happens in diverse teams that are inclusive, creating a safe space where ideas can be shared and innovation can thrive. <sup>74</sup>
<b>Knowledge-sharing in diverse teams</b>	Building on this, another study found supporting evidence that an inclusive climate (where employees perceive there is an appreciation of difference and inclusion in team decision-making) is linked to enhanced knowledge-sharing in teams with both surface- and deep-level diversity. <sup>75</sup>
<b>Job commitment and performance</b>	Survey data has linked perceptions of inclusion with job commitment and performance in diverse groups, whereas there was a weak link between these factors and diversity management (such as communicating a commitment to diversity or having clear policies in place around diversity). <sup>76</sup>
<b>Minimising barriers for underrepresented groups</b>	Research finds that high workplace inclusion supports people with disabilities to thrive at work. The researchers suggest that inclusion is related to self-efficacy, that is, someone’s belief that they can do their job, and is supported by feeling like part of a team, presumably because it helps the individual feel like a valued team member. <sup>77</sup>

However, it’s important to note that further research is needed to explore the mechanisms behind inclusion, as the findings here are based on cross-sectional data that shows an association between inclusion and various outcomes but can’t explain cause and effect.

### **Diversity climate versus inclusion climate**

As noted above, much of the literature on inclusion cites acknowledging and appreciating difference among individuals as key. While inclusion and diversity are separate concepts, they are somewhat intertwined in practice, given that ‘difference’ is often synonymous with demographic characteristics. Therefore, in order to be

inclusive, businesses are required to actively value the skills and abilities of typically underrepresented or marginalised groups.<sup>78</sup>

And, it's important to consider that feeling represented is an important part of inclusion; individual feelings of inclusion may depend somewhat on how well represented an individual's demographic group is.<sup>79</sup>

The concept of diversity climate has been identified in research literature. This relates to how diversity is appreciated and valued in an organisation, and what policies and practices are in place to support diversity (such as how effectively managers lead diverse teams).<sup>80, 81</sup>

These measures often include items relating to inclusion such as the extent to which diverse perspectives are valued.<sup>82</sup>

While inclusion is about employee experience for all, organisations also need to pay attention to diversity. For example, current employees may feel the business is inclusive, but if the current employee base is relatively homogenous, measures of inclusion may not tell the whole story.

### Summary

Our literature review highlights several key theories on inclusion, regardless of whether we consider individual perceptions of inclusion or the 'inclusive organisation'. Namely, inclusive environments allow individuals to feel like they are a valued, supported member of a team or organisation. And, as well as having fair policies and practices in place, difference must be seen as a positive for true inclusion.

Our review highlights that inclusive environments, where everyone can share knowledge and feel valued at work, can contribute to reduced absenteeism, enhanced creativity, and reduce the barriers to inclusion for underrepresented groups. However, most of the evidence in this area is theoretical or is unable to identify cause and effect; therefore, further evidence is needed to explore the causal mechanism at play when it comes to inclusion, as well as more exploration of how individual feelings of inclusion are impacted by organisational practices.

*Given that all employees are unique, inclusion is relevant for everyone in a business.*

Finally, while diversity and inclusion are separate concepts, it's clear that, especially at an organisational level, inclusion strategies can't ignore diversity. One study neatly sums up that inclusion is the way in which organisations and leaders can create a positive environment for a diverse workforce<sup>83</sup> – although it's important to note that diversity could easily be substituted for 'difference' and doesn't need to refer to demographic characteristics. Given that all employees are unique, inclusion is relevant for everyone in a business.

### People professionals and D&I leads: points for practice

- **Consider inclusion from an individual and organisational perspective, and how the two influence each other.** Allowing all employees to develop, participate and use their voices to influence important decision-making can affect how members of the workforce experience and perceive inclusion at an individual level.
- **Make inclusion relevant to all employees.** Ensure that employees understand that inclusion is about how we relate to and work with others in the business. This means that inclusion not only impacts everyone in their role, but that it is everyone's responsibility to act in an inclusive way.

- **Understand the barriers to inclusion in the organisational context.** One solution won't result in everyone feeling included. Employers need to understand the barriers to inclusion for different groups within their organisational context.
- **Ensure D&I strategies address inclusion, as well as diversity.** While inclusion and diversity are undoubtedly related, they are separate concepts. Practices aiming to increase diversity may not be appropriate to develop inclusion (we discuss the behaviours and practices associated with inclusion in section 3).
- **Empower leaders to champion inclusion.** Leaders need to role-model inclusive behaviours and use their resources to effect change.

It is also vital that organisations understand *how* inclusive they are, whether they need to improve and how they can do this. In the following sections, this report will first outline a number of measures used to assess inclusion, before exploring how inclusion can be developed through different behaviours, practices and values.

## 5 Assessing inclusion

### Key findings

- Organisations can assess their current inclusivity in several ways, drawing on theories of workplace inclusion.
- These measures vary in focus from individual feelings of team belonging, to comprehensive measures where employees share perceptions of manager and peer behaviour, people management practices and organisational values.
- Organisations need to consider a range of data when understanding their current levels of inclusivity, and ensure any data collected is representative of the workforce.

As we note in the previous section, inclusion is conceptualised as an individual's feelings of how they relate to their team (for example, do they feel valued? Do they feel like they can be themselves?). An organisation's policies, practices and processes can therefore influence how included an individual feels. For this reason we can define an inclusive organisation as one that has inclusive policies in place that are enacted fairly, values difference, and allows employees voice and influence.

It is therefore important to see inclusion and the feeling of being included as an outcome of practices that can be influenced to various extents. In this section, we explore how inclusion can be assessed from individual and organisational perspectives, highlighting measures that have been developed in the scientific literature (see Table 3 for further detail on the survey items).

### Measuring inclusion: taking an individual and organisational perspective

Measures of inclusion developed in the scientific literature involve employees sharing their perceptions of their own feelings of inclusion, or their perceptions on organisational practices. Both provide insightful data for people professionals.



At an individual level, one measure has been developed that assesses individual perceptions of belonging. This includes questions in which individuals rate how far they feel part of a team; for example, do they feel like they belong to their team and feel like they can authentically be themselves in their team?<sup>84</sup>

Given the importance of line managers in inclusion, one measurement tool allows line managers to assess their own beliefs and behaviours associated with inclusion<sup>85, 86</sup> – for example, their own beliefs towards difference, and their own ability to challenge exclusionary behaviour (we discuss line manager behaviour in more detail in the next section).

Next, inclusion can be assessed at a climate level. Nishii (2013)<sup>87</sup> develops and tests a measure of inclusion climate, where employees share their views in three areas:

- 1 perception that practices are fair and are designed in a non-biased way
- 2 the organisation allows people to be themselves at work without recrimination, and the organisation recognises and values difference
- 3 the inclusion of all employees in decision-making processes, even if their view differs from the status quo.

Finally, a holistic measure of inclusion has been developed for individuals to share their views on inclusion at five levels, recognising that individual perceptions of inclusion are influenced by an array of factors. Individuals rate inclusion in their immediate work group, line manager behaviour, senior leaders’ commitment to D&I, and finally inclusion at an informal, social level.<sup>88</sup> The measure includes items that assess whether employees feel like they are part of a team, their line managers’ ability to inclusively manage a team, and whether the organisation values difference.

It should be noted that these scales were developed in a Western context. They would therefore need to be validated or piloted in other regions.

**Table 3: Summary of inclusion measurement tools from academic literature**

Source	Type of measurement	Definition	Measurement
<b>Jansen et al 2014</b> <sup>89</sup>	Individual perceptions of inclusion within a team	Jansen et al suggest that inclusion is based on belonging and authenticity, and design a tool to understand whether employees feel included within their team.	The authors develop the Perceived Group Inclusion scale, which measures perceptions of belonging and authenticity such as being allowed to be their authentic self, and feelings of belonging to the group.
<b>Tworoger et al (2010),<sup>90</sup> Turnbull et al (2011)</b> <sup>91</sup>	Individual line manager beliefs and behaviours associated with inclusion	The authors identify several competencies associated with inclusion, such as valuing difference and managing conflict.	The questionnaire includes a number of behaviours and beliefs for managers to self-rate – for example, whether they believe different thinking styles are beneficial, and how far they support fair recruitment, promotion and reward. In other words, this tool measures the skills needed to be inclusive.

<p><b>Nishii (2013)</b><sup>92</sup></p>	<p>Employee views of key factors associated with inclusive climate – at an organisation or departmental level</p>	<p>Nishii identifies three key factors associated with an inclusive organisational climate: fair employment practices, integration of differences, employee inclusion in decision-making.</p>	<p>This measure asks individuals to rate the fairness of various practices (like promotion processes), how far the organisation integrates difference (for example, valuing who employees are as people), and how far people are included in decision-making.</p>
<p><b>Mor Barak (2005)</b><sup>93</sup></p>	<p>Employee-level perceptions of a variety of organisational behaviours, practices and values</p>	<p>Inclusion and exclusion exist on a continuum, and hinge on five levels of inclusion – at a work group, organisation, line manager, senior leadership and informal/ social level.</p>	<p>This scale (the Mor Barak Inclusion Exclusion Scale, or MBIE) assesses individual-level feelings of inclusion at all organisational levels – from manager information-sharing to inclusion in informal ‘water cooler’ conversations, along with the extent to which the organisation is committed to D&amp;I.</p>

### Summary

Given the multi-level nature of inclusion at work, comprehensively measuring inclusion in the workplace also needs to assess multiple aspects of the work environment. Assessing individual feelings of inclusion at a team level, as well as perceptions of organisational practices and values, will give a more comprehensive picture of the current state of play.

But, there are practical considerations for people professionals to make when assessing inclusion in their business. We outline recommendations for measurement below.

### Insights and action

A number of insights can be gained from inclusion data. Given that organisational practices and values should impact employee experience, and thereby individual feelings of inclusion, assessing inclusion from both levels can act as an evaluation of the effectiveness of D&I policies and practices.

For example, if employees agree that there are clear D&I policies in place, but don't feel a sense of belonging within their team, exploration of how line managers enact these policies might be needed.

While inclusion is a separate concept to diversity, understanding *who* feels included at work at a demographic level can surface barriers to inclusion. For example, if women and BAME employees are more likely to perceive that promotion practices are unfair, a review of promotion processes could be carried out. Inclusion data could also be used to benchmark and evaluate the success of inclusion change programmes or D&I strategy over time.

While organisations need to understand their current inclusivity, it may not be practical for organisations to run a lengthy survey based solely on inclusion, especially if they have a regular staff survey or operate in a small business. There are, however, other ways people professionals can change their practice to understand and improve inclusion.

### People professionals and D&I leads: points for practice

There are a number of ways we suggest that organisations can approach the measurement of inclusion:

- **Create a bespoke survey to collect inclusion data**, measuring individual-level perceptions of inclusion at multiple levels, drawing on the existing measures outlined above.
- **Add inclusion questions to existing surveys** (for example, opportunities for voice, feelings of belonging, and organisational values relating to diversity).
- **Make use of existing survey data** (for example, culture or employee engagement surveys) for questions relating to inclusion – (for example, influence on decision-making, equality of opportunity or fairness of policies and practices).
- **Convene representative focus groups** to surface particular issues (for example, around channels for voice and decision-making).
- **Assess people management policies and practices** and line management capability around inclusion (for example, using appraisal or 360 feedback data to understand employee and line manager behaviours related to inclusion).
- **Analyse existing workforce data to uncover barriers to inclusion** (for example, comparing promotion rates between men or women, the demographics of who applies for roles versus who is appointed or retention rates for different groups).

However organisations approach the measurement of inclusion, they need to take steps to ensure that the data is reflective of the whole organisation as far as possible by providing multiple ways to provide feedback, ensuring that the data collection itself is inclusive and the reason for collecting data is clearly communicated.

Organisations would also do well to assess inclusion from an individual viewpoint – that is, whether individuals feel included, respected and valued, as well as understanding employee views of manager and organisation behaviour and practices more broadly.

Assessing inclusion at work may shine a light on barriers to inclusion. In the next section, we discuss the behaviours, practices and values of inclusive organisations and how these might build inclusion to address such barriers.

## 6 Building inclusion through behaviours, practices and values

### Key findings

- Employees play an important role in developing inclusive workplaces – for example, calling out exclusionary behaviour and treating colleagues with fairness and respect.
- Line manager and employee relationships are important to building inclusion; not only do line managers put D&I policies into practice through people management practices, but the way they treat staff and actively include them in decision-making and their influence on the day-to-day team environment is crucial for inclusion.

- Senior leaders need to role-model inclusion and ‘walk the talk’; their behaviour sets the tone for what is expected in the workplace.
- D&I policies need to be in place, but they must be backed up by a climate for inclusion that values difference.
- People management practices should be evaluated for bias; for example, do progression and promotion or voice practices promote inclusion?
- Specific practices (such as reasonable adjustments and diversity policies) and broader practices (such as flexible working) can support inclusion. This recognises that while inclusive practices should be applied across the board, some groups face particular issues that require targeted support.

We’ve seen that inclusion operates at many levels, so there’s no one ‘quick win’ to create an inclusive workplace. Business leaders and people professionals need to consider organisational values and practices, along with the role of line managers and employees, as they move towards building inclusion. In this section, we draw on the scientific evidence to examine the behaviours and practices linked with inclusion and provide recommendations for line managers and people professionals.

### Employee behaviours

People professionals and line managers need to role-model inclusive behaviour, but for a workplace to be truly inclusive, employees at all levels of the business need to be clear on the behaviour that’s expected of them.

Employees contribute to inclusion in several ways. First, all employees need to treat others with dignity and respect. The CIPD *UK Working Lives* survey<sup>94</sup> found that 22% of employees felt members of their team would reject others for being different. One way to address this could be to develop self-awareness of how we relate to others, especially those we perceive as ‘different’. We discuss the potential effectiveness of D&I training to tackle unconscious bias in the CIPD’s forthcoming report *D&I Practice That Works: An evidence-based view*.<sup>95</sup>

There are, then, general, informal, social cues that help develop a climate for inclusion and contribute to a sense of belonging,<sup>96</sup> such as participation in informal ‘water cooler’ conversations or social activities. Ensuring social activities are accessible for all is one way that employees can ensure no one is excluded – whether purposefully or not.

Finally, allyship and willingness to challenge exclusionary behaviour is an important part of creating a supportive environment. A qualitative study of employees in sports organisations in the USA found that willingness of peers to speak out and call out discriminatory behaviour was seen as a key part of creating a LGBT-inclusive culture,<sup>97</sup> whereas inaction can feel like peers are ‘complicit’ in exclusionary behaviour. This highlights the important role that ‘majority’ groups can play in actively championing inclusion.

### Line manager behaviour

Line managers often operationalise HR policies and strategy, meaning their buy-in to, and understanding of, inclusion is key.<sup>98</sup> A positive relationship between line manager and employee has been linked to inclusion<sup>99</sup> (see Box 4), highlighting the role managers play in making employees feel valued and supported. However, it’s important to note that this research does not identify cause and effect. It’s possible that employees who feel like they belong find it easier to develop a positive relationship with their manager.

On the face of it, being inclusive has many parallels with simply being a good manager, treating all employees with respect, supporting their development and ensuring they have a say in the workplace. But, bias – both conscious and unconscious – means that the experience of work will differ between employees. For example, research suggests that diverse teams may receive lower performance ratings than less diverse teams, potentially due to manager bias.<sup>100</sup> In order to be inclusive, then, managers may need to address the idea that their *'own assumptions and expectations about how people "should" think and act is a basis for success'*.<sup>101</sup>

#### Box 4: Linking line management relationships and inclusion

Leader-member exchange (LMX) theory suggests that the quality of exchange between the leader and those who report directly to them can impact on how employees evaluate themselves and their experience of the working environment. If a manager enables employees to feel like their contribution to the business is valued and that they 'belong' in a team, this can enhance feelings of inclusion.

Survey research in US public service organisations supports this idea.<sup>102</sup> Over 12 months, strong LMX was associated with perceptions of inclusion, more so than organisation commitment and job satisfaction. This study does not identify cause and effect, but does highlight that the positive link between inclusion and line management relationship is consistent over time.

Managers also have a role to play in ensuring all team members have a voice in the organisation, as well as in team decision-making. This involves encouraging contributions from all team members and ensuring not just those in a 'high status' role can have their voices heard.<sup>103</sup> One study suggests that doing this enhances 'team identity', where hierarchies in a team are minimised, especially in groups with different professional statuses (for example, this research examined multidisciplinary health care team inclusion). It's important to note that there is a balance to be made between creating a strong team identity and allowing individual team members to feel like they can be valued for their own unique skills and abilities. Creating a team identity is not about creating a homogenous team – rather, it's about creating one where different points of view are legitimate and appreciated.

Research identifies several potential skills and behaviours needed for inclusive management, although there is relatively little research testing the outcomes of these models.

Turnbull et al (2010<sup>104</sup>, 2011<sup>105</sup>) highlight a broad range of behaviours and beliefs needed for inclusive management. These highlight several competencies for managers: being sensitive to diversity issues; having integrity when relating to difference; interacting positively with difference; valuing difference; promoting team inclusion; and embedding inclusion into ways of working.

Building these competencies may, in some cases, require tailored development for managers. This is where people professionals and D&I specialists can support and equip managers with resource and guidance. Senior leaders also have a role to play – role-modelling inclusive behaviours within their own teams and supporting them to act as D&I champions.

### Senior leaders' role in inclusion

Senior leaders also need to champion inclusion because they set the tone at the top; they provide a reference point for what behaviour is expected and rewarded in a business. These social norms provide important behaviour cues for employees.

If a senior leader behaves in an exclusionary way, it signals that inclusion isn't a key priority for business. On the other hand, championing inclusion allows senior leaders to have positive influence, can encourage helping behaviour<sup>106</sup> and is also linked with performance, productivity, satisfaction and well-being.<sup>107</sup>

One model of inclusive leadership highlights that leaders must visibly model inclusive behaviour, and importantly, this role-modelling must be authentic. This means believing that being inclusive is the right thing to do, for business and individuals, rather than treating inclusion as a tick-box exercise.<sup>108</sup> Creating this buy-in can be challenging. The CIPD's forthcoming report *D&I Practice That Works: An evidence-based view*,<sup>109</sup> will discuss building buy-in for D&I in more detail.

### Making the boardroom inclusive

Finally, government policy has put pressure on business to make boards more representative, but what about board inclusion? One study in our review<sup>110</sup> examined the experience of BAME board members. They identified exclusionary behaviours present on boards such as discussing, but not acting on, D&I, the dominant group maintaining power, and offensive jokes. On the flip side, being comfortable raising issues, having clear diversity values, the presence of training and the feeling that they were encouraged to be themselves were linked to feelings of inclusion.

While board members occupy a powerful position in an organisational hierarchy, the experience of all board members is not equal, which shines a light on the importance of inclusionary behaviour at all levels of business. As well as increasing diversity on boards, we need to recognise the importance of inclusion at this level and recognise that to both recruit and retain diverse board members, inclusion needs to be considered.

### Organisational practices

Positive employee and leader behaviours need to be coupled with inclusive and fair people management practices that motivate all employees and allow them to develop skills and contribute to organisational goals.<sup>111</sup>

Creating inclusive HR policies and people management practices is where inclusion and diversity have the strongest overlap. A core part of organisational inclusion is the presence of policies and commitment to diversity<sup>112</sup> – which needs to recognise that some groups typically face higher levels of discrimination at work or barriers to inclusion.

*A core part of organisational inclusion is the presence of policies and commitment to diversity – which needs to recognise that some groups typically face higher levels of discrimination at work or barriers to inclusion.*

This means that a two-pronged approach needs to be taken. Policies might need to be adapted or targeted for the needs of a particular group, recognising the unique needs of individuals. And, as one researcher puts it, amending practices can 'institutionalize' inclusion.<sup>113</sup> Doing so can be an important signal to employees that the organisation is committed to D&I<sup>114</sup> and contributes to a climate for diversity<sup>115</sup> (although any such policy must be put into practice and be part of a wider inclusion climate to be effective).

Recent research<sup>116</sup> suggests that these identity-specific approaches, such as having specific strategies for certain parts of the workforce, are more effective at building a climate for inclusion than general approaches. The authors suggest that targeted action signals a commitment to diversity, whereas general programmes do not. And, general approaches can only be effective if decision-makers are aware of, and manage, their own biases.

Nonetheless, there are other, more general areas where formal and informal mechanisms can be improved to enhance inclusion. For example, feeling like one has a ‘say’ in an organisation has been identified as a key part of inclusion, so ensuring everyone has access to channels is important. Employers should examine how individuals express their views in their organisations – whether through informal conversations with managers, or through formal channels such as complaints procedures, employee councils or unions (for more on voice at work, see the CIPD’s *Talking about Voice* report<sup>117</sup>). Employee resource groups (ERGs) – for example, LGBT+, BAME and disability networks – have a key role to play in ensuring voice channels are available to all, without bias. ERGs can provide a safe channel for voice for particular groups and can also galvanise action in an organisation and challenge poor practice.

Actively engaging with work–life balance programmes and organisations that consider work–life balance also contributes to a climate of inclusion, recognising the roles that employees have in and outside of work.<sup>118</sup> This suggests that flexible working can enhance inclusion by helping people into work and stay in work. Flexible working offers different patterns of working that the traditional full-time, fixed-location model can’t, enabling better inclusion of workers from different backgrounds and circumstances.

Finally, Church et al<sup>119</sup> suggest that a systems development approach needs to be taken to create true change in D&I and to embed into organisational practices. They highlight a number of organisation development areas and people management systems where *not* embedding D&I can allow bias to creep in. Instead, inclusion can be used as a lens through which to adjust and evaluate people management and organisational development practices.

They highlight a number of areas where inclusion can be embedded into an organisation’s way of doing things. One area is performance management. Are D&I goals assessed in objectives and are they aligned to reward systems? Is inclusion considered as part of employee feedback? In leadership appraisal, for example, awareness of D&I-related competencies is thought to be critical because it enhances self-awareness and thereby the change process. So, D&I-related competencies must be a key part of leadership and not a ‘sideline’ set of behaviours. In turn, this can contribute to the sense that an organisation truly values D&I.

### **Organisational values, climate and culture**

Our review identifies the potential components of an inclusive climate:<sup>120</sup> presence of fair policies and practices, recognising and valuing difference, and including all employees in decision-making processes. However, there’s little empirical evidence in the research literature on how to effectively turn this theory into practice, particularly in regards to ensuring difference is valued and not a barrier to inclusion.

However, one theoretical model of inclusion culture suggests a four-part process is needed to work towards this culture, recognising that systems alone can’t create an inclusive culture, and instead norms and values need to be changed. These are:<sup>121</sup>

- 1 raising awareness and encouraging reflection on current norms
- 2 developing a vision of organisational inclusion, and the change that is needed
- 3 assessing and adapting management practices accordingly
- 4 building this vision into people management practices – both through increasing competence and amended reward and recognition practices.

Research on climate more generally – that is, the social norms and shared understanding on what behaviours are expected – suggests that climate can be influenced by workplace practices,<sup>122</sup> so assessing both informal and formal practices (including the fairness of formal processes such as promotion and pay, as well as more informal practices such as networks) is a good place to start.

And, organisations signalling that diversity is valued is a key part of fostering climates for inclusion. This can be built through senior leaders committing to diversity and inclusion, and having fair management practices,<sup>123</sup> although any commitment and policies must translate to meaningful action, resource and advocacy to create a truly inclusive environment.

More broadly, organisations can also demonstrate a commitment to diversity and inclusion by working to create value in local communities, and tapping into a wide pool of talent, seeing the potential of applicants outside the usual talent pool as talent to develop, rather than ‘disposable labour’.<sup>124</sup>

### Summary

Employees, line managers, senior leadership and people professionals are all able to influence the inclusivity of organisations. People professionals and D&I specialists are particularly critical at the level of evaluation and improvement, challenging bias and working inclusively in their own practice, but it’s clear that inclusion can’t be ‘a job’ for HR. A systemic approach is needed, embedding inclusion into the organisation’s way of doing things, through the practices and behaviours of all stakeholders.<sup>125</sup>

However, there are a number of areas that have the potential to influence individual feelings of inclusion and perceptions of inclusive practices; namely, line management, robust people management practices, and organisational commitment to D&I. Where best to focus efforts should be guided by organisational data and an understanding of where current barriers to inclusion lie. We outline some general recommendations for line managers and people professionals below.

#### People professionals and D&I leads: points for practice

As experts in people, work and change, people professionals are ideally positioned to challenge exclusionary practices, embed inclusion into people management strategy, and role-model inclusive working behaviour in their own practice. People professionals should:

- **Role-model inclusive behaviour** in their day-to-day role. The CIPD recognises working inclusively as a core behaviour for all people professionals in the new Profession Map, the international benchmark for the people profession.
- **Use organisational data, tracked over time, to review policies and practices** and inclusive behaviour throughout the organisation. This could involve working with representatives across the business to gather feedback on practices and policies, accessibility and barriers.
- **Involve employees at all levels of the business in inclusion**; facilitate reflection on what inclusion means to them in their day-to-day role, what their role is in building inclusion, and how this is reflected in organisational values.
- **Work with senior leaders to embed inclusion** into the organisation’s way of doing things; highlight the importance of their advocacy and buy-in.



- **Embed inclusion into wider practices** such as talent management, appraisals and skills development. For example, do employees get feedback on behaviours related to inclusion?
- **Clearly communicate the policies in place to support diversity and inclusion at work**, why they are important and support employees and managers to access and embed these policies.
- **Support line managers to effectively carry out policies and practices.** People professionals need to understand management capability (both middle and senior managers) in relation to inclusion and highlight where development is needed.

### Line managers: points for practice

Our review highlights several competencies that are needed for line managers to act inclusively. People professionals should consider how best to support managers to develop these skills. Managers need to:

- **Develop self-awareness and understand bias;** the way individuals relate to difference can impact on the opportunities and experience that employees have in the workplace, and this bias might influence management behaviours.
- **Take action to create an inclusive environment for teams**, both role-modelling inclusive behaviour and challenging exclusionary behaviour (for example, proactively and sensitively handling team conflict).
- **Build positive relationships with all team members**, taking steps to understand the needs and strengths of individual team members.
- **Ensure all team members have opportunity to contribute** in team discussions and projects, creating the sense that all contributions are valued.
- **Encourage feedback from all team members**, even if feedback challenges the status quo.

## 7 Conclusion

Inclusion is increasingly a focus in organisational D&I strategy. However, it's less clear what this focus on inclusion looks like in practice, and by extension whether it represents a step change in how businesses are approaching D&I.

### Inclusion – belonging without conformity

This review highlights that inclusion is conceptually distinct from diversity. Inclusion is a part of how an employee experiences their workplace, grounded in theories of how we evaluate our social environments, and where we 'fit' within them and what 'groups' we feel we belong to. Diversity, on the other hand, refers to the differences represented within an organisation.

An employee's perception of inclusion relates to having a voice, being treated fairly, and a sense of belonging. Importantly, this belonging must stem from the feeling that they don't need to conform – difference is valued, rather than distrusted. True inclusion arises where individuals feel they will be valued for their own unique views and skills, not when 'different' people are accepted into an organisation as long as they comply with existing organisation norms. But, this comes with its own challenges given human bias towards

people ‘like us’. How best to manage the tension between belonging and the desire for authenticity requires further exploration.

While inclusion and diversity are different concepts, in practice there is some overlap between diversity and inclusion at work. This is in part because an employee view of whether their workplace is inclusive is influenced by whether their organisation has fair promotion and hiring practices and has D&I policies in place. The reality of modern work is that some demographic groups fare better than others and have better inclusion experiences at work. Not considering diversity and inclusion in the round risks ignoring specific barriers to inclusion.

*Inclusion is fundamentally about individual experience and allowing everyone at work to contribute and feel a part of an organisation, not the practice of ‘including’ diverse groups in the workplace. It’s clear that while related, inclusive practices can’t be rebranded diversity programmes.*

By bringing together the literature on inclusion, this review provides a nuanced understanding of what it really means, for both organisations and the individuals within them. Inclusion is fundamentally about individual experience and allowing everyone at work to contribute and feel a part of an organisation, not the practice of ‘including’ diverse groups in the workplace. It’s clear that, while related, inclusive practices can’t be rebranded diversity programmes.

Any inclusion strategy must recognise that increasing representation contributes to diversity and potential inclusion, but won’t lead to inclusion by itself. It requires a holistic view of how people are valued in an organisation, and an honest assessment of how biases and group dynamics impact on employee experiences of being valued, included or excluded.

We need to be clear on what issues D&I strategies seek to address to create meaningful change in both areas. For example, reviewing and amending job adverts to make them more attractive to a diverse range of candidates might be successful in increasing diversity in the talent pipeline, but won’t address barriers to inclusion at interview stage, or improve employee experience in the workplace.

### **Reframing the diversity and inclusion conversation**

The evidence base highlights that the general principles of inclusion transcend diversity as it is often defined in organisations (in terms of groups of protected characteristics, for example). No team is homogenous – everyone is ‘different’ in some way, so taking an intersectional approach where organisations consider how they value and support employees as individuals is the first step to becoming more inclusive. This may require a departure from thinking about diversity just in reference to protected characteristics.

We recommend that the diversity and inclusion discourse be reframed. Often diversity is considered to be the ‘predictor’ of workplace outcomes (for example, firm performance), and diversity metrics are used to evaluate D&I strategy. This is undoubtedly useful in galvanising action, and increasing workplace representation is still necessary and important, but, further action needs to be taken to address the barriers to inclusion.

Inclusion must be elevated to become a core outcome measure that gives insight into employee experience. Taking this one step further, inclusion could be reframed as the ‘predictor’ of organisational and employee outcomes, with ‘diversity’ metrics used to

highlight where inclusion is falling short – because, if some feel included in a workplace, and others don't, it's not an inclusive workplace at all.

### **We need a better understanding of the mechanisms and practices that influence inclusion**

People are fundamental to business success, and creating an environment where everyone can meaningfully contribute simply makes sense. Indeed, some research does support the idea that inclusion is linked to creativity and knowledge-sharing<sup>126</sup> and reduced absenteeism.<sup>127</sup> But this study highlights that research into inclusion is less established than research into diversity.

The findings in this report are based on theoretical and survey-based research, but we did not identify any randomised, controlled research that robustly tests the impact of change programmes or initiatives that seek to create inclusive climates or cultures, or evaluate which organisational practices result in inclusion. Also, further research is needed that explores the mechanisms through which inclusion can have beneficial impacts for business and employees, and whether these impacts are contingent on other factors.

As noted in the CIPD's research, *Diversity and Inclusion at Work: Facing up to the business case*,<sup>128</sup> while there's a large body of research linking diversity to performance, there's far less research on how to effectively increase diversity. While building the 'case' for diversity and inclusion is important to galvanise action, we also need better evidence on what action is most effective.

### **Taking action on inclusion**

Nonetheless, becoming inclusive requires action on the part of employers. Inclusion is a complex concept that interacts with diversity and equality – both issues that extend beyond the workplace. Social mobility, education and socialisation all contribute to structural and power inequalities in societies – but as key parts of the community, organisations have a responsibility to make their workplaces accessible, positive environments for everyone.

Given this complexity, and the dearth of literature into effective change, this requires careful diagnoses of the barriers to inclusion in the workplace. We suggest that inclusivity be assessed at multiple levels to effectively map where resource and attention can best be utilised.

*Organisations need to take a systemic approach to inclusion, appreciating that inclusion isn't about allowing 'different' people to 'fit in'. Instead, inclusion is about creating an environment where everyone is appreciated for being individual.*

Organisations need to take a systemic approach to inclusion, appreciating that inclusion isn't about allowing 'different' people to 'fit in'. Instead, inclusion is about creating an environment where everyone is appreciated for being individual. Practically, this means putting systems and practices in place that tackle bias and structural issues that result in different perspectives failing to be valued if they are different from the status quo, or from the 'majority'.

People professionals cannot be the only ones championing inclusion, but as experts in people, work and change, they are uniquely positioned to take the lead and create positive impact. There are a number of ways they can do this. They must role-model inclusive behaviours in their own work, challenge exclusionary behaviour and practices, and influence business leaders to understand the value of inclusion and, by extension,

diversity. These approaches are necessary to enable the business to prioritise and invest in management capability, employee experience and people management practices. A willingness to discuss sensitive inclusion issues must also emerge from these actions.

Taking action requires careful strategy and considered delivery, but organisations and employees have much to gain from being more inclusive. Creating a positive environment where everyone can influence, share knowledge and have their perspective valued is key for employee satisfaction, retention and well-being. And, crucially, being inclusive allows different perspectives to be heard, irrespective of the nature of that difference. Tapping into this can only help business make better decisions and understand their customers – both vital for businesses that want to continue to thrive and innovate into the future.

## 8 Appendix

### Research methodology

This review answers three questions:

- 1 What is inclusion and how does it impact on workplace outcomes?**
- 2 How can organisations assess inclusion?**
- 3 Which behaviours, practices and organisational values build workplace inclusion?**

Specifically, we review and report on articles that:

- explore or develop the concept of inclusion
- highlight the empirical outcomes of inclusive behaviours at an individual, team or organisational level
- outline inclusive behaviours, competencies or organisational cultures, including those that develop measurement tools for inclusion.

### Inclusion criteria

To be included in the review, articles had to:

- relate to inclusion in a workplace setting (rather than in education or other wider societal settings, such as political participation)
- be published after 1990
- be available in the English language
- be peer reviewed.

### Search

Inclusion has a variety of different meanings in different disciplines. To ensure results were relevant, a broad combination of search terms were used alongside inclusion terms (such as belonging or inclusion), such as ‘HRM’, ‘environment’ and ‘diversity’. Related concepts, such as diversity climate, were also included, as the initial literature review suggested some overlap between this measure and measures of inclusion.

Two databases (Ebsco and ABI/Inform) were searched in November 2018, and again in May 2019 to identify any new articles. In addition, we conducted a manual search of key paper reference lists to ensure articles were not missed. This search identified 369 unique articles.

### Selection

Once duplicate papers were removed from search results, articles were reviewed using their title and abstract to remove obviously irrelevant papers. 243 articles were discarded at this stage, resulting in a total of 126 papers for full-text review.

Each remaining article was reviewed using the full text, for relevance to the research question. Irrelevant papers, papers without full-text availability, or papers that failed to meet the inclusion criteria were removed.

A manual search of references and citing literature for key papers was also conducted to ensure key papers were not missed.

A total of 50 articles were included in the final review, including those from manual search.

The search terms used, and results of the search, are below.

### Search terms and hits

Search terms	ABI	Ebsco
ti(inclusi*) AND ab(divers*)	144	78
ti('divers* climate') and Ab(inclusi*)	5	2
ti('divers* culture') and Ab(inclusi*)	1	0
ti(HRM) and ab(inclusi*)	10	6
ti(environment) AND ab(inclusi*)	38	6
ti(competenc*) and (ti(divers*) OR ab(inclusi*))	43	5
ti(multicultur*) AND ab(inclusi*)	11	7
ti(includ*) ab(inclusi*)	23	3
ti(belong*) and (ti(divers*) OR ab(inclusi*))	0	0
<b>TOTAL</b>	<b>275</b>	<b>116</b>
Total unique papers	<b>369</b>	

## 9 Notes

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