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# An Exploratory Study of an Executive Team Leading Diversity, Equity, Inclusion, and Belonging (DEIB)

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An Exploratory Study of an Executive Team Leading Diversity, Equity, Inclusion, and  
Belonging (DEIB)

by

Tara LaShawn Cooper

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

Doctor of Education  
in  
Educational Leadership: Postsecondary Education

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### **Abstract**

With the increasing demographic diversity and critical focus on social justice in the United States, leaders are under significant pressure to integrate diversity, equity, inclusion and belonging (DEIB) strategies into their core operations and organizational culture. Challenged to think more critically about how to better prepare and support leaders in DEIB efforts, minimal research exists to provide insights on how executives should prepare, what they might expect, or the proven practices in DEIB. Driven by this lack of literature, this qualitative study explored how an executive team experienced and navigated the complexities of integrating and advancing DEIB in their organization. Specifically, the study investigated their deeper cognitive and emotional experiences, including how their thinking, attitudes, and actions evolved and changed over time.

Analysis of interviews and document review yielded four primary themes based on participants' experiences: motivation, challenges, lessons learned, and advice for fellow leaders. The insights gleaned from this study significantly enrich the existing discourse on DEIB and organizational transformation by: emphasizing the pivotal role of a CEO's visible commitment and leadership in shaping executive motivation and involvement in DEIB initiatives; documenting the successes of a collaborative leadership model where all executives actively participate; focusing on the development of critical consciousness and impact of positionality in DEIB leadership; addressing the challenges and trial-and-error nature of DEIB implementation and calling for further research into effective strategies and the development of new frameworks and support structures for leaders.

### **Dedication**

This triumph is dedicated to my son, Andre. You are my North Star. You inspire me, give me hope, and without fail, you remind me of my way home. Son, remember who you are and whose you are and keep reaching for the fullness of your purpose. When we stand on faith and have the courage and willingness to stretch, nothing is beyond our reach. Always remember that--well, that and clean up after yourself, and give more than you take . . .

### **Acknowledgments**

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## **Chapter One - Introduction**

By the year 2055, there will be no single ethnic or racial majority in the United States (U.S.) and these changes and growth patterns are predicted to be linked primarily to immigration from Latin America and Asia (Cohn & Caumont, 2016). In the U.S., ethnic and racial identity intersects with various structural inequities, including access to education, employment opportunities, healthcare, and housing. These inequities contribute to disparities in life chances and outcomes (Hill & Curry Stevens, 2017). Compared to their white counterparts, for Blacks, Indigenous Peoples, Latinx and other people of color, racial and ethnic identity intersects with economic disparities: people of color experience higher rates of poverty, unemployment, and income; educational disparities: students from marginalized racial and ethnic groups face lower educational attainment and achievement due to barriers such as inadequate funding for schools in their communities, discrimination within educational institutions, and limited access to resources and opportunities; and health outcome disparities: people of color experience higher rates of chronic illnesses, lower life expectancy, and reduced access to quality healthcare compared to white populations (Monk, 2021; Morehouse & Banaji, 2024).

The ramifications of historical and current racial inequality in the U.S., combined with these growing demographic trends, suggest an even greater need to address racial and ethnic inequities and find ways to support the diversity that exists and continues to grow in our country and around the world. In addition to issues of equality and social justice, other global socioeconomic trends, such as advancements in technology, economic policy, international trade, and global market connections, have all served to

increase the means and speed by which geographic boundaries are traversed on a regular basis. This includes resources, such as information, materials, services, and actual people. The workforce is and continues to become more diverse (Mor Barak & Travis, 2013; Porterfield, 2023) and, as a result, there is a greater need for organizations to “understand and contend with added complexities due to variability in cultural norms, values, and language” (Roberson, 2019, p. 70). In the U.S., these complexities are commonly examined and discussed through the lens of diversity, equity, inclusion, and belonging (DEIB).

According to the U.S. Census Bureau, the U.S. population, and its labor force, is becoming significantly more diverse. Projections from the Bureau indicate that by 2044, demographic groups presently considered minorities will constitute the majority (Porterfield, 2023) A comparison by CNN Money (n.d.) reported, that of 76 million baby boomers, 72% of them identify as white, while of 87 million millennials, only 56% identify as white. The Bureau of Labor Statistics (2019) also reported that 16.9% of the workforce was foreign-born, with Hispanics comprising 48.3% of this foreign-born population, Asians comprising 25%, Whites comprising 16.2%, and Blacks comprising 9.3%. These statistics, along with social justice uprisings, prompted intensified attention to diversity and inclusion efforts in organizations across the nation (Anand & Winters, 2008; Boehm et al., 2014; Fujimoto & Härtel, 2017; McGuire & Bagher, 2010; Theodorakopoulos & Budwhar, 2015).

While many leaders agree there is a need and potential value in a diversified workforce, they often struggle to identify: how to increase and support employee

diversity in all roles across the organization; how to best integrate equity and inclusion in ways that are measurable, fair, and sustainable over time; and how to define and describe the business impact and benefits of diversity and inclusion (i.e., employment branding, creativity, productivity, service development, marketing, and sales). Given these unanswered concerns, workplace DEIB issues have moved to the forefront of strategic planning and improvement goals for many companies and organizations.

### **Framing the Problem**

When it comes to DEIB, organizations take different approaches to leading and managing diversity and inclusion efforts. Diversity management is defined as “specific policies and programs to enhance recruitment, inclusion, promotion, and retention of employees who are different from the majority of an organization’s workforce” (Mor Barak et al., 2016, p. 309). In organizations, one of the most popular approaches to addressing DEIB and managing diversity is hiring outside consultants and diversity training providers (Bennett, 2013; Bezrukova et al., 2016; Kaltenbaugh, Parsons, Brubaker, Bonadio, & Locust, 2017; Nishii, 2017; Roberson, 2006). In 2017, diversity training was estimated to be a 200 million dollar a year industry, and those revenues have grown an outstanding 390% (Chung et al., 2017; Lambert, 2017; Society for Human Resource Management, 2021). In 2022, U.S. companies reportedly spent upwards of \$8 billion a year on DEIB training and initiatives (Williams & Dolkas, 2022; Williams, 2021). By 2023 that number climbed to \$10.9 billion and as market research firm, Global Industry Analysts Inc., reported that figure is expected to soar to \$24.4 billion by 2030 (Global Industry Analysts Inc., 2024).

Originally, DEIB programs were primarily linked with mandatory training, workshops, targeted recruitment, or minority quotas. Today, the billion-dollar industry focuses on implementing strategies, policies, initiatives, practices, measurements, and programs designed to promote diversity, ensure equity, and foster inclusivity and sense of belonging. DEIB programs have evolved to encompass (but are not limited to):

- Leadership accountability strategies to ensure DEI goals are incorporated into the performance objectives of leaders responsible for advancing and sustaining DEIB in the organization (Nwoga, 2023).
- Recruitment and retention strategies aimed at hiring and advancing diverse talent into leadership roles (Cenkci et al., 2019).
- DEIB audits to review policy and practices to identify opportunities to reduce workplace biases and create more equitable and inclusive practices and culture (Cenkci et al., 2019).
- Training programs that educate employees on inclusive behaviors and increase awareness of conscious/unconscious biases (Curry-Stevens & Nissen 2011).
- Develop internal support structures such as employee resource groups consisting of voluntary members who share common interests or backgrounds, who meet to discuss and create suggestions and action plans for issues pertinent to their group (Cenkci et al., 2019).
- Community engagement activities designed to connect the organization to the broader community and support underserved communities (Hellerstedt, Uman, & Wennberg 2024).

- Data collection to identify and analyze gaps, track progress, and identify areas for improvement (Williams & Dolkas, 2022).
- Development of equity plans or accountability structures to track specific goals and metrics (Hill & Curry-Stevens, 2017).
- Integration of DEIB measures throughout organizational practices and initiatives as opposed to being assigned as special or ad hoc projects (Hill & Curry-Stevens, 2017; Griffin et al., 2007; Nelson, 2014).

DEIB programs have transformed from mere mandatory trainings and quotas to a comprehensive approach encompassing leadership accountability and change strategies for organizations.

Research on organizational change posits that successful organizational change relies on tangible and sustainable changes in policy, practices, and culture; and changes to the individual and collective behavior (Weiner 2008). This suggests that planning and implementation of organizational change focused on DEIB requires changes in how things are done organizationally, as well as individual behavior change. Research also suggests that this individual change be modeled and driven by executive and top-level leadership (Ng, & Sears, 2018; Zak 2020). Despite these clear expectations, when it comes to internal DEIB leadership and change efforts, organizations, and leadership teams struggle, with sometimes dire consequences.

While leaders struggle to increase and support diversity, mismanagement of these efforts can be costly and ineffective. For example, high staff turnover can become an issue because “Focusing on diversity without attending to equity and inclusion will risk

creating ‘revolving doors’ for marginalized and discriminated groups” (Hellerstedt, Uman, & Wennberg 2024, p.21). Litigation, such as class action lawsuits (Lambert, 2017), also become costly consequences for organizations. Studies have documented historical underrepresentation of racial, ethnic and gender groups in different jobs, careers, leadership, and other authority positions (Chin & Eagly, 2010; Haverman & Beresford, 2012; Jones, 2018) and lawsuits based on claims of unfair exclusion and discrimination (Burns, 2012; Ross, 2008). According to Lambert (2017), “workplace discrimination lawsuits can cost an average of \$250,000 per case, and employers paid \$638 million in 2013 to settle discrimination cases . . . turnover due to perceived unfairness cost employers \$64 billion (Burns, 2012; Ross, 2008)” (p. 21). Lambert also noted that aside from the billions of dollars paid out in lawsuits, there are many other intangible, yet high costs associated with perceived unfairness and discrimination, including “decreased engagement, increased absenteeism, increased conflict, and lower morale” (p. 21). Although there can be many benefits to diversity and inclusion, they are not automatic and when leaders fail at diversity and inclusion efforts, the results can be costly and even devastating to the organization.

Ultimately, the experience of diversity initiatives in the workplace can be perceived as positive, negative, or neutral, but it all depends on how the organizational leaders implement and support the initiatives. This means that the actual benefits of diversity and inclusion are dependent upon how DEIB is perceived and managed by the organization and its leaders (Curtis & Dreachslin, 2008; Ehrke et al., 2014). To help ensure positive outcomes of diversity, strategies for managing diversity and creating

inclusive workplaces have become increasingly important. To support leaders in building and sustaining these diverse and inclusive organizations, we must first understand the challenges and experiences leaders can expect to encounter spearheading this type of organizational change.

### **Statement of the Research Problem**

As the country and world's populations continue to grow in diversity, cultural ways of life continue to evolve and amplify, and the need for workplace environments to evolve and better integrate this diversity intensifies. There is an increasing expectation and demand that the workplace environment become more diverse and inclusive to all employees while also creating awareness of inequity and social injustice, but leaders are left to figure out how to address these demands and spearhead organizational transformational change that acknowledges and advances DEIB. Historically the approach to DEIB change has focused on one-off trainings that often heavily emphasize individual awareness and cultural competence (Curry-Stevens & Nissen 2011; Ejaz et al., 2011; Flory et al., 2021; Spears, 2004). Even when successfully implemented, these trainings most often lead to superficial increase in awareness, and technical changes or shifts in behavior. Furthermore, these trainings, on their own, provide minimal guidance or support for sustaining the deeper work needed to disrupt entrenched organizational norms and procedures that might perpetuate structural racism and other social and economic disparities (Abramovitz & Blitz, 2015; Ray, 2019). Though the development of strategic DEIB plans should, by nature, have a deeper and more sustained focus on structural and organizational change, the success of DEIB plans is also dependent upon



organizational capacity and commitment, ultimately driven by the buy-in and support of leadership. The commitment of the organizational leadership team is critical to any successful change initiative, but even more so with DEIB change. The leadership team collectively and individually will face moments where they are expected to confront and address some of their own deeply ingrained beliefs, biases and practices related to DEIB. However, in organizational cultures steeped in hierarchy, competition, and dominant white cultural norms, even with leadership commitment and a strategic approach to engaging in DEIB change, implementing DEIB changes can easily result in organizational fragmentation and resistance or other forms of intense backlash. Although necessary for success, commitment and current strategies are simply not enough (Flory et al., 2021; Lambert 2017; Ray 2019).

Although the general organizational change literature provides extensive research on a leader's role in typical organizational change efforts, there is a significant gap in the literature on transformational DEIB organizational change and more specifically, the roles and experiences of the executive leaders in those efforts (Taylor Kennedy & Jain-Link, 2020; Verdeja-Woodson 2023). Furthermore, there have been few studies on the relationship between white men and DEIB initiatives and the existing research on the topic is primarily concentrated on the obstacles hindering white men from actively participating in furthering DEIB efforts, rather than exploring avenues for their constructive involvement or leadership in these initiatives (Taylor Kennedy & Jain-Link, 2020; Verdeja-Woodson 2023; Welp, 1997). These literature offerings are insufficient considering that demographic trends indicate that white men predominantly occupy

leadership positions across U.S.-owned companies and that the percentage of white male leaders increases with the level of leadership (Shelton, & Thomas, 2013; Verdeja-Woodson 2023).

As with any organizational change effort, the roles and participation of executive leaders are critical to success and likelihood of sustained change over time. Even in organizations that employ Chief Diversity Officers or high-level Diversity Directors, those roles are not enough to build and sustain transformative change. Recent studies show that Chief Diversity Officers from marginalized groups tend to receive lower levels of support for the DEIB initiatives they advocate and are often regarded with skepticism as they are perceived as being driven by self-interests in these initiatives (Gardner and Ryan, 2020). This further accentuates the need for full leadership support for DEIB change, and yet there is minimal research that addresses the roles or experience of executive leaders and teams engaged in this work. In a time when leaders are seeking guidance on understanding and implementing DEIB change at both personal and organizational levels, the lack of literature and training resources on executive-level DEIB leadership leaves leaders uninformed and unsure about the best ways to guide their organizations in this critical work (Hogan, O'Rourke, Weeks, et al., 2023).

Left to maximize efforts to shape and implement lasting change in their organization, while navigating the personal experience of leading the DEIB change, the lack of robust literature and resources available to support executive leaders are what intensify the challenges of leading DEIB change. There simply is not enough support or research focused on these challenges and this study intends to surface the experiences,

perspectives, and needs of executives leading transformational DEIB change in their organization.

### **The Significance of the Research Problem**

Executives and senior leaders are seeking guidance and understanding of what to anticipate in leading such endeavors, particularly those who may not typically be tasked with driving such transformations. Navigating this unfamiliar terrain remains increasingly daunting, with the potential consequences of failure posing significant risks to both the organization's reputation and personal career trajectories. Without comprehensive insight into the journeys of other executives leading DEIB efforts, including both the obstacles and achievements on personal and professional fronts, leaders may find themselves ill-prepared to navigate the complexities of fostering transformative DEIB effectively.

### **Purpose of the Study and Methodology**

The purpose of this study was to explore and better understand the roles and experiences of senior and executive-level leaders working to advance DEIB change in their organization. Commonly, the organizational change and training literature for DEIB change focuses on the moral benefits, the business benefits, or a combination of the two. This extensive literature argues the merits of “why” DEIB work is important and necessary in the workplace, and in some cases, “what” work needs to be done (i.e., types of training and knowledge-building awareness people need, or policies that need to be implemented). While the literature may suggest various activities and programming, the research typically reflects options focused on individual change and stand-alone training (i.e., learning DEIB terminology; bias training for hiring managers) as opposed to

comprehensive programming embedded in the organization's mission and goals.

Additionally, the research is focused on efforts led by human resources leaders or other company roles or teams, other than the executive leadership team (Curry-Stevens & Nissen 2011; Lambert 2017; Nwoga 2023). Consequently, there is an inadequate amount of literature targeting how executive leaders might implement comprehensive, transformative change across their organization, what they should expect along the way, and how to best navigate the experience.

Understanding how to navigate leading DEIB change is critical and yet there is no guidance on how executive and high-level leaders might first navigate their own personal perspectives of DEIB, while simultaneously building a comprehensive organizational perspective. The influence of the role and positionality of the leader, the barriers and challenges of implementing and sustaining DEIB change have yet to be explored or clearly defined. Given the contemporary controversies, backlash, and wide range of perspectives on DEIB in the workplace, it is imperative that leaders are supported and better prepared to lead such change. In response, this study examined the experiences of a team of executive leaders as they navigated personal and professional experiences leading transformative DEIB organizational change. With a focus on the leader's experience (see Table 1), the study's goal was to uncover the personal and professional experiences, as well as the experiences as individual leaders and a collective leadership team. The study was a qualitative study, exploratory in nature, examining the leaders' leadership approach, thought processes and the emotional impact of the work,

phenomena insufficiently researched and not well-understood in DEIB leadership (Nwoga 2023; Merriam & Tisdell, 2016).

Figure 1: Study Focus



### **Methodology and Research Questions**

The purpose of this study was to explore and gain insight into the experiences of a team of executive leaders as they implemented transformative DEIB change in their organization. In this exploratory qualitative study interviews and document analysis were used to elicit data about the leaders' experiences. The following research questions served as the guide for this study:

1. How do executive leadership team members experience their participation in a sustained DEIB-focused organizational change initiative?
2. What have the executive team members learned through their experiences engaging in the DEIB change initiative in their company?

### **Critical Consciousness as the Paradigmatic Lens**

Critical consciousness (CC) was used as a paradigmatic lens for analyzing and understanding the experiences of executive leadership team members engaged in DEIB-focused organizational change. Freire (1971) originally described CC as self-awareness of both one's situational and environmental contexts and the ongoing development of agency to bring about change to those contexts as a result of their new awareness. More succinctly, in a recent literature review, Seider and colleagues (2017) defined CC as "the ability to engage in reflection and action upon the world in order to transform it" (p. 1162). Originally, CC was organized according to three foundational dimensions: To be able to analyze and critically self-reflect, to effect change, and to act and challenge oppressive social forces (Freire, 1973). More recently, the dimensions have been synthesized and described as critical reflection, critical motivation, and critical action (Pitner & Sakamoto, 2005; Wallin-Ruschman, 2017). In the newer understandings of CC, critical reflection, (i.e., or the analytic introspection of one's personal values and professional practices), Pitner and Sakamoto (2005) also include the "examination of biases, assumptions, and cultural worldviews [that] affect the ways we perceive difference and power dynamics" (p. 2). Ultimately, critical reflection is intended to lead to continuous learning, unlearning, and reconstruction of knowledge that can lead to the transformation of beliefs and practices.

### **Understanding Critical Consciousness in the Context of this Study**

Leading DEIB change differs from leading other, more traditional categories of organizational change in that it often has a strong emphasis on addressing systemic

inequalities and promoting social justice within the organization and broader society; can involve challenging existing norms, values, and practices that perpetuate bias and discrimination; and it typically involves engaging a wide range of stakeholders, including employees, leadership, customers, and communities whereas traditional change efforts may focus more narrowly on top-down implementation without as much emphasis on stakeholder involvement

In this study, the interviews served as an opportunity for participants to further process, describe, and attribute significance to their experiences as well as prioritize and determine the salience of details or events. In the second round of interviews, participants were able to further reflect on contexts defined by external influences such as identity-based socio-political histories, organizational structures, and social status. CC ideology posits that a person's social identity is constantly being renegotiated and heavily influenced by social, political, cultural, historical, and even socio-economic factors (Brady, 1995; Hermans & Kempen, 1998; Pinderhughes, 1989; Pitner & Sakamoto, 2005). In these ways, the personal reflexive practices for social identity are in alignment with cognitive processes for meaning making, making CC an important lens for the study.

### **Definitions of Key Concepts**

**Agency:** A person's ability to "define or interpret a situation and act based on that definition" (Musolf, 2017, p. 12). In the context of critical consciousness, agency requires an ability to define or interpret a situation in ways that uncover ideologies of inferiority or ideologies that privilege one group over another; agency addresses the ways in which

people "... are motivated to act in given ways that are ... contrary to dominant powers and beliefs" (Musolf, 2017, p. 12). Danielewicz (2001) defines agency as the following:

The power or freedom or will to act, to make decisions, to exert pressure, to participate . . . or to be strategically silent. Although agency can't be externally fixed or even identified, we can recognize it in ourselves. We experience agency as an internal, embodied feeling, a self-consciousness, or a will to act. (p. 163)

**Bias and Unconscious Bias:** Bias, or "prejudice in favor of or against one thing, person, or group compared with another, usually in an unfair or negative way" (Boden, 2020) may be held by an individual, group, or institution. The impact of the bias can be negative or positive, depending on whether the person affected is a member of the group that is advantaged or disadvantaged by the biased activity. Unconscious or implicit bias is described as "attitudes and stereotypes that influence judgment, decision-making, and behavior in ways that are outside of conscious awareness and/or control" (Boden, 2020). Our implicit biases are deeply rooted in our subconscious and these attitudes and stereotypes can affect our understanding, actions, and decisions in an unconscious manner that can lead us to unwittingly behave in ways that do not necessarily align with our own declared beliefs (Dalton & Villagran, 2018; Staats, 2016).

**Culture:** "Collective programming of the mind; it manifests itself not only in values, but in more superficial ways: in symbols, heroes, and rituals" (Hofstede, 2001, p. 1). Culture has also been described as patterns of beliefs, behaviors, and values learned and shared among a group of interacting people (Bennett, 1993).



**Diversity:** Diversity can be understood as a numerical representation of different types of people. Categories of representation might include race, ethnicity, physical ability, cognitive ability, gender, age, sexual preference, religion, nationality, language, economic status, height, weight, level of education, professional background, etc. *Diversity of thought and leadership* means there are no one set of skills and practices or ways of thinking that are considered “normal” or superior. Collective practices and norms incorporate multiple voices and perspectives (Ferdman, 2013; Ferdman & Davidson, 2002a; Miller & Katz, 2002).

**DEIB:** As previously defined, DEIB is the acronym for diversity, equity, inclusion, and belonging. Other common acronyms include (but are not limited to): DEI: Diversity, Equity, and Inclusion; EDI: Equity, Diversity, and Inclusion; DIB: Diversity, Inclusion, and Belonging; DEIJ: Diversity, Equity, Inclusion, and Justice; and DEIAB: Diversity, Equity, Inclusion, Accessibility, and Belonging. The variations in acronyms often reflect nuanced differences in emphasis, but they all generally refer to the overarching goal of promoting diversity, equity, inclusion, and a sense of belonging in organizations and communities.

**Ethnocentrism:** The tendency to place one’s culture at the center of reality and evaluate other cultures through the lens of one’s own, often resulting in a sense of the superiority of one’s culture (Andersen & Taylor, 2007).

**Equity:** Equity refers to “fair treatment for all, while striving to identify and eliminate inequities and barriers” (Boden, 2020). More specifically, unlike equality where each person receives equal portions of the same resource regardless of want or need, equity

ensures that each person has access to the resource they need, in the appropriate portion of the resource necessary for the person to meet their goals and thrive. Resources might be tangible items like food or medication, or resources can be in the form of opportunities, networks, or support systems.

Racial equity is the condition that would be achieved if one's racial identity no longer predicted, in a statistical sense, how one fares. Racial equity requires elimination of policies, practices, attitudes, and cultural messages that either reinforce differential outcomes by race or fail to eliminate them.

**Inclusion:** Inclusion in the workplace can be applied in three specific areas. First, inclusion related to access applies to the degree to which previously excluded or underrepresented groups are represented within the organization in different roles, at different levels throughout the organization. Whereas those groups were previously blocked, or it was difficult for members of the underrepresented groups to integrate and advance within the organization, new efforts and initiatives that allow access may increase the numerical representation of underrepresented groups, but they do not guarantee a climate of inclusion. If members of previously excluded groups are invited into the organization but are expected to assimilate and hide aspects of themselves so they can be accepted, they may not feel truly welcomed or “included” in the organizational culture. In addition to representation, inclusion in the workplace is also a marker of “the extent to which employees feel valued, respected, encouraged to fully participate, and able to be their authentic selves” (Boden, 2020). Inclusion as

measurement of workplace culture can be critical and Ferdman (2013) summed up the phenomenon as follows:

The practice of inclusion is dynamic and ongoing: because inclusion is created and re-created continuously—in both small and large ways—organizations, groups, and individuals cannot work on becoming inclusive just once and then assume that they are done; it is a recursive and never-ending approach to work and life. (p. 13)

**Majority Rule:** A common value and approach to decision making in U.S. culture, politics, and business leadership. In majority rule ideology, the largest number of people within a group, or the “majority,” have the largest amount of influence and decision-making power. Conversely, those found in smaller numbers within the group, or the “minority,” have the least amount of power, voice, and visibility in decision making.

**Racism:** Racism can be described as existing in three main categories: cultural racism, personal racism, and institutional racism (also referred to as structural racism). Cultural racism can be described in multiple ways. It involves a preference for one’s own cultural heritage, expressions, and values *and* an aversion to, and imposition on, other cultures. Cultural racism refers to the ways in which “dominant culture is founded upon and then defines and shapes norms, values, beliefs, standards, and reality to advantage White people and oppress People of Color; the norms, values, or standards assumed by the dominant society perpetuate racism” ([surjpoliticalsite.weebly.com](http://surjpoliticalsite.weebly.com)). Furthermore, “cultural racism uses cultural differences to overtly and covertly assign value and normality to white people and whiteness in order to rationalize the unequal status and degrading treatment of People and Communities of Color”

([surjpoliticaledsite.weebly.com](http://surjpoliticaledsite.weebly.com)). Historically and to date, cultural racism calls out tangible characteristics of culture such as language, social customs, celebrations and activities, aesthetic values, religious and moral beliefs, and practices (Halstead, 1988; Scott, 2007). An example of cultural racism is how native Spanish-speaking students are forced to learn English and their lack of English as their native language is treated as an intellectual deficit, but native English-speaking children are encouraged to learn Spanish or other languages because in that context, being bilingual is seen as an asset. Another example is beauty standards. The mainstream archetype of a beauty woman is a White, thin, blond-haired woman (i.e., Barbie). Women with fuller body figures, dark skin, and/or thick, kinky hair are not portrayed as universally beautiful in the media and typically not considered as attractive (i.e., comments like, “you are pretty for a dark-skinned girl” because the expectation is that the two are mutually exclusive).

*Personal racism* refers to “the ways in which we perpetuate and/or assume the idea that white people are inherently better and/or People of Color are inherently inferior on an individual basis” ([surjpoliticaledsite.weebly.com](http://surjpoliticaledsite.weebly.com)). Personal racism focuses on the interpersonal aspects of racism and reflects behaviors driven by racialized implicit bias. Examples of personal racism include making negative assumptions of someone based on their race and notions of racial inferiority, using derogatory racial slurs, and decision making based on racial stereotypes as opposed to the person’s actual skills, abilities, or what would be in their best interest to succeed and thrive.

*Institutional/Structural racism* refers to “the ways in which the structures, systems, policies, and procedures of institutions in the U.S. are founded upon and then promote,

reproduce, and perpetuate advantages for white people and the oppression of People of Color” ([surjpoliticalsite.weebly.com](http://surjpoliticalsite.weebly.com)). Consider government agencies such as housing, employment, and labor as well as institutions like banks, education, health care, criminal justice, and media—that all perpetuate institutional racism. For example, People of Color are underrepresented and misrepresented on television (which only serves to further perpetuate cultural racism and bias), racially biased standardized tests are used to determine who is admitted to higher education programs and institutions and redlining and housing discrimination still occur regularly across the United States.

**Structures:** In our society, structures influence and even define social action as they refer to “patterned social relations, rules, and resources. . . . Capital – financial, social, cultural, human, and symbolic represent resources” (Musolf, 2017, p. 12). Structure also refers to the numerous social contexts over which individuals rarely have control such as “race, class, sex, ideology, institutions, division of labor, organizations, hierarchy, groups, geographical location, period of history, mode of production, generational cohort, family, culture, norms, and roles” (p. 12). Musolf also explains,

In general, structure influences social arrangements, social relations, and social practices that exert enormous power and constraint over our lives. Structure organizes social positions hierarchically in all institutions so that power emanates from those who control the means of administration and violence to make and enforce policy. Policy constraints everyone. Policy makers, interpreters, and enforcers, whether corporate, legislative, judicial, executive, ecclesiastical, or royal, control rules and resources that shape social relations and can devastate lives. (p. 12).

**Tokenism:** A situation where an individual is selected for a position primarily based on a sociodemographic characteristic such as gender or ethnicity. However, despite their appointment, they often lack the same level of influence or authority as members of the majority group (Hellerstedt, Uman, & Wennberg 2024).

**Transformative learning:** Transformative learning refers to the process by which an individual's frame of reference or meaning perspective is changed (Mezirow, 1997, 2006).

### Chapter Summary

This chapter introduced the urgent need for workplace environments to evolve in how diversity and inclusion is integrated into organizational goals and outcomes. Next the discussion moved to how historically, DEIB programs have revolved around isolated training sessions, lacking the capacity to create structural shifts that lead to transformational change. Additionally, there is an inadequate amount of research focused on preparing executive leaders' wanting to spearhead transformational DEIB change in their organization. This study fills this gap in research literature by exploring the roles and experiences of executive leaders driving DEIB-focused organizational change. Lastly, the chapter introduced CC as the paradigmatic lens of the study. CC emphasizes self-awareness, critical reflection, and action to challenge the status quo of oppressive systems, making it an effective framework for analyzing the complex dynamics involved in navigating and leading DEIB change. Through qualitative interviews and document analysis, the study uncovered how the executive leaders navigated the personal and professional nuances of leading DEIB change, shedding light on the complexities and

triumphs of their journeys and contributing to a deeper understanding of this critical phenomenon.

In this dissertation, Chapter Two presents a review of relevant literature, encompassing topics such as the necessity for diversity and inclusion training in workplaces, organizational change theories, nuances of DEIB organizational change, and additional factors influencing leadership in DEIB initiatives, such as motivation, positionality, identity politics, and CC. Chapter Three provides a detailed accounting of the research methodology, including details on site and participant selection, data collection procedures, data analysis methods, and the ethical considerations ensuring research integrity, as well as the researcher's positionality. Chapter Four delves into the research findings, covering motivations, challenges, lessons learned, and advice for other leaders. Finally, the concluding chapter addresses the guiding research questions, discusses the implications of the study's results, and suggests opportunities for future research and practice in DEIB leadership.

## **Chapter Two - Review of the Literature**

This qualitative study explored the experiences of executive leaders engaged in DEIB focused organizational change. While literature describing the importance and benefits of DEIB organizational change (Lambert, 2017; Mor Barak et al., 2016; Ray, 2019) and what to do to create DEIB organization change exist (Griffin et al., 2007; Hill & Curry-Stevens, 2017; Lambert 2017; Ray, 2019), there is minimal literature describing the experiences of executives leading this type of change. More concerning published guidance is scattered and insufficient for executive leaders regarding what to expect or how to lead this specific type of organizational change. The purpose of this study was to explore and gain insight about their experiences implementing second-order, transformative change. This chapter first reviews the evidence supporting the organizational benefits of successful DEIB efforts in the workplace and current trends in DEIB investments. Following this, the research on organizational change and leaders' individual roles in organizational change is discussed. The next section explores DEIB-centered organizational change and those aspects of DEIB change that make those efforts unique from other organizational change efforts. Lastly, this chapter discusses literature about leading DEIB change before discussing CC and positionality as theoretical frameworks for analyzing the executive leaders' multilayered experiences in this organizational change endeavor.

### **Benefits of a Diverse Workplace**

Recent research (Hill & Curry 2017; Hunt et al., 2020; Lambert, 2017; Lee, 2021; Hellerstedt, Uman, & Wennberg 2024) suggests there are many benefits to diversity and



inclusion in the workplace, from employee job satisfaction to business productivity and success. Based on findings from their longitudinal study, (Hunt et al., 2020) claimed, “The most diverse companies are now more likely than ever to outperform non-diverse companies on profitability” (p. 3) and went on to report “companies in the top quartile of gender diversity on executive teams were 25% more likely to experience above-average profitability . . . the higher the representation, the higher the likelihood of outperformance” (p.3). Similarly, in terms of ethnic and cultural diversity, they described the findings as “equally compelling” reporting companies with higher representations of racial and cultural diversity outperformed their companies with lower representation in terms of profitability.

Diversity among employees can also provide new perspectives and approaches to problem solving. According to Lee (2021), when organizations hire people from a broad representation of backgrounds and lived experiences, the diversity in perspectives dismantles the typical homogeneous thinking and ways of operating on traditional work teams. Lee stated that in a homogenous team or group of people, the process of innovation, from the brainstorming and thought generation, to the ideas for solving the problems, are all likely to be similar, lacking creativity and nuance. In homogeneous groups, there is less opportunity for divergent thinking and more likelihood to assume everyone is faced with the same challenge that can be resolved by the same solution. Again, this type of thinking limits creativity and inhibits broad, expansive, and inclusive solution seeking. Conversely, a heterogeneous or diverse team will contribute unique perspectives that inherently disrupt assumptions of sameness and introduce new

understandings of needs and solutions to the situation. Lee (2021) also asserts new perspectives and circumstances can spark novel ideas and approaches and, in his review of the research, he found that companies with high levels of diversity demonstrate more innovation, and that diverse teams see a 60% improvement in creativity and decision-making abilities.

In addition to an increase in approaches and innovation, diversity was linked to creating a potentially broader reach with an organization's customer base, a finding supported by social theory literature. Drawing on Festinger's (1954) social comparison theory, a study by Mor Barak and colleagues (2016) suggested, in general, people feel more comfortable with people they perceive as similar in terms of personal identity and lived experience. The study also revealed that people are more empathetic and more easily relate to people in their shared identity group. Townes, Chavez-Korell, and Cunningham (2009) stated that members of marginalized or non-dominant groups "... often feel more comfortable receiving services from people with whom they share important characteristics, such as race and ethnicity" (p. 308). Thus, diversity within an organization can be leveraged to positively affect the diversity of the organization's clientele and potentially other stakeholders.

Another benefit of diversity in the workplace is a wider talent pool for hiring. According to Lee (2021), two-thirds of job seekers consider workplace diversity an important factor when considering employment opportunities, and more than half of current employees want their workplace to do more to increase diversity. Employees expect more than a paycheck from a job; they want a work environment where they will

be challenged and grow professionally, a place where diversity is embraced and they feel accepted, and a place that attracts a broader range of candidates. CNN Money (2021) reported the millennial and Gen Z generations are the most diverse in history which suggests companies are experiencing and will continue to experience unprecedented diversity within applicant pools and potential new hires. Our workplaces are becoming increasingly multicultural, global, and interdependent (Lambert, 2017; Toossi, 2006), which highlights the urgency and importance of engaging in change initiatives that prioritize diversity and inclusion. Most commonly, organizations attend to this work under the banner of DEIB. At minimum, the addition of equity can be understood as an acknowledgement of the importance of treating everyone fairly, even across differences. Beyond that, the exact meaning of equity is dependent upon the organization and its culture.

### **DEIB Investments**

Amidst the heightened focus on DEIB across workplaces nationwide, organizations are dedicating increasingly substantial resources toward advancing and managing DEIB initiatives (Hunt et al., 2020; Tyson, 2021; Vogel, 2021). For example, in a study involving senior DEIB leaders from large companies, it was found that out of 227 participants, 26% reported budgets exceeding \$50 million, with the number of employees dedicated to DEIB work quadrupling after 2019 (Vogel, 2021). According to a survey conducted by OneStream Software (Tyson, 2021), nearly 90% of North American financial executives surveyed reported that their companies expanded budgets for DEIB training. Additionally, 77% of financial executives and 65% of IT leaders reported

increased investments in DEIB, surpassing the 52% reported by other industries. In the same survey of 340 finance decision-makers in the U.S., Canada, and Mexico, 85% of companies reported increased spending to align business practices with new DEIB and environmental initiatives. While these findings highlight a rise in spending and resource allocations for DEIB across businesses, organizational leaders still struggle to implement lasting DEIB change measures.

### **Organizational Change**

Broadly defined, organizational change refers to adjustments or adaptations to an organization's internal make-up, structures, or practices. A synthesis of several leading change models emphasized the significance of establishing a clear vision and strategy for the change project. The literature further indicates that this vision should encompass aspects such as the rationale behind the organizational change, the anticipated attributes, and outcomes of the change (Hill & Curry 2017; Errida & Lofti, 2021; Lee, 2021). Despite this emphasis on a clearly defined scope and strategy that aligns with and propels the overarching organizational strategy (Errida & Lofti, 2021), there is a profound lack of peer-reviewed research providing insights or identifying specific objectives, implementation strategies, or tracking and accountability measures related to promising practices and strategies for implementing DEIB organizational change goals or achieving outcomes (Paluck et al 2021; Devine & Ash 2022). However, leaders continue to try to understand DEIB change and find ways to advance DEIB in their companies. This section examines various types of organizational change models, the rationales and motivations driving DEIB change endeavors, and the primary areas of focus in

organizational change efforts.

### **Rationales for DEIB Organizational Change**

Arguments supporting the necessity of DEIB initiatives in the workplace have traditionally been driven by two different logics coined as moral justice logic and business case logic (Hellerstedt, Uman, & Wennberg 2024; Johns, Green, & Powell, 2012). The moral justice logic traces its origins back to anti-slavery movements and more recent social and grassroots movements, emphasizing the attainment of equal opportunities for individuals through legal means. The underlying assumption of this rationale is that if societal shifts are driven by legal reforms, for example, Affirmative Action and other quota-based legislation, organizational leaders are consequently pressured to establish and maintain initiatives that support diversity and equity for historically underrepresented groups (Thomas, 1992). In contrast, organizational change driven by the business case logic appeals to leaders' self-interest and recognition of organizational benefits of diversity (Cox & Blake, 1991b). In short, moral justice logic centers individual changes in attitudes and beliefs which are subjective and rely on individual interpretations, while business case logic centers business outcomes and relies on leaders to define and drive the specific changes to individual behavior to achieve those outcomes (Hellerstedt, Uman, & Wennberg 2024).

#### ***Moral Justice Logic***

It is often emphasized that DEIB programs should be embraced and pursued because it's the right thing to do or more specifically, they are “socially and morally justified” according to researchers Hellerstedt, Uman, & Wennberg (2024). Their

scholarship on moral justice logic described the ethical framework and its origins contending:

The moral justice logic towards DEI in organizations and society is inspired by the original ideas of grassroots movements in the 1960s. This logic argued that “differences should not make a difference,” signaling inclusion as an ultimate aim . . . This logic also focuses on equal rights . . . where all individuals are given equal and fair treatment as citizens, employees, or customers. (p.6)

Moral justice logic embodies the principles of fairness and equality suggesting that by providing individuals equal opportunity and access can help address and remediate historical and systemic inequalities based on race, ethnicity, gender, sexuality, disability, and other dimensions of diversity. Moral justice logic attempts to acknowledge the inherent worth and dignity of all individuals and seeks to challenge oppressive systems and structures that perpetuate discrimination and marginalization (Hellerstedt, Uman, & Wennberg, 2024; Thomas 1992).

While the moral justice case logic for DEIB is often seen as a more ethically grounded approach than the business case, several common critiques and challenges have been identified including (Ely & Thomas, 2020; Hellerstedt, Uman, & Wennberg 2024; Steimel, 2021; Steel & Bolduc, 2020):

- DEIB initiatives based on moral or social justice principles can be seen as imposing specific values on individuals within the organization who may have different beliefs.

- Initiatives framed primarily in terms of social justice can sometimes polarize workplaces, especially if they are perceived as accusatory or confrontational. Employees might feel unfairly targeted or blamed for systemic issues, leading to backlash and decreased engagement with DEIB efforts.
- These frameworks can be complex and subject to varying interpretations. Different stakeholders may have different views on what equity and justice should look like, leading to disagreements and conflict that are seemingly impossible to resolve.
- There can be concerns about how resources are allocated in pursuit of DEIB goals and how the efforts divert resources from other pressing organizational needs.
- The success of initiatives driven by moral justice logic is harder to measure making it difficult to hold organizations accountable for real progress, as changes in attitudes and culture are more qualitative and can take longer to manifest.
- Even with a focus on morality and justice, organizations can still fall into the trap of tokenism or making surface-level changes that do not address deeper systemic issues.
- Initiatives that do not align with business objectives may struggle to sustain support, especially in times of economic downturn or leadership changes. Without demonstrating how DEIB aligns with overall business strategy, these efforts are often viewed as expendable or secondary.

Addressing these critiques often involves building a broad consensus around the values and goals of DEIB, ensuring open dialogue, and integrating moral imperatives with

practical strategies that address both the ethical and operational needs of the organization. Most organizations do not have the time, capacity or other resources to adequately or effectively address these critiques.

### ***Business Case Logic***

Over time, DEIB programming and leadership justifications began to shift from a moral imperative to focus on the potential economic benefits of diversity in hopes that an economic focus might motivate for-profit businesses to adopt diversity management practices to increase business profitability (Nkomo et al., 2019). Referred to as the business case for diversity, this framework views diversity as advantageous for problem-solving and innovation due to the presence of a broader range of information and diverse perspectives. Higher productivity and better products and business outcomes translate to higher profits and market share for businesses. The business rationale and drive for diversity is grounded in a “goal-oriented utilitarian ethic,” (Hellerstedt, Uman, & Wennberg 2024) or an approach or perspective that prioritizes achieving specific goals or outcomes while maximizing overall utility or benefit.

While business case logic for DEIB suggests that diverse and inclusive organizations are more innovative and perform better competitively and financially, there are several critiques of this logic, including (Ely & Thomas, 2020; Steimel, 2021; Steel & Bolduc, 2020):

- The logic potentially reduces DEIB to a tool for profit maximization and treats diversity as a means to an end rather than as a value to be pursued for its own



sake. This can result in organizations focusing only on those aspects of diversity that they believe will directly contribute to financial performance.

- When DEIB efforts are primarily justified by business outcomes, there is a risk that efforts will be abandoned if they do not quickly lead to financial gains. This can undermine long-term commitment to organizational change.
- This approach oversimplifies complex issues surrounding DEIB, ignoring systemic and structural inequalities that cannot be addressed merely by improving business metrics. The approach often overlooks the deeper work needed to change organizational culture and address biases at all levels.
- Organizations might focus on certain dimensions of diversity (i.e. gender and race) that are perceived as more directly linked to performance outcomes, while neglecting other important aspects, such as socioeconomic background, disability, or age.
- Diversity can be relatively easier to quantify (e.g., through demographic statistics), while equity and inclusion are more challenging to measure and improve. Consequently, they may receive less attention, even though they are critical for making diversity efforts successful and sustainable.
- A focus on external appearances of diversity can lead to tokenism or an illusion of diversity without genuine integration or empowerment within the organization.
- The approach can cause contention as many believe that the moral and ethical imperatives for DEIB should be sufficient to drive initiatives. Relying heavily on

a business rationale can undermine the ethical arguments and value of promoting diversity and inclusion as the right thing to do regardless of financial outcomes. Ultimately, when striving to implement transformational DEIB change in an organization, increasing diversity does not, by itself, increase effectiveness; what matters is how an organization harnesses diversity, and whether it's willing to reshape its power structures (Ely & Thomas, 2020).

### **Primary Areas of Organizational Change: Process, Structure, and Attitude**

In organizational change, there are three primary areas for focusing change: process, structure, and attitude (Welton et al., 2018; Kezar, 2001). Each of these areas of change represents a key lever for implementing and sustaining organizational change.

*Process change* involves strategically aligning and mobilizing resources to attain specific business objectives, such as assigning tasks to individuals and teams or reconfiguring the organization's decision-making structures. In process change, distinct parts or procedures are established or modified to enhance the execution of tasks geared towards achieving goals. Given that employees interpret and engage with organizational structures—such as hierarchies, policies, and procedures—at the process level, prioritizing attention to processes and deliberate process-focused change is crucial (Welton et al., 2018) and can lead to minor or transformative shifts for the organization. For example, an organization might implement hiring review meetings to reinforce newly established hiring policies and expectations. These meetings signify a change in process aimed at assisting the organization in achieving its goal, yet it requires no changes to the organization's structure. This change might represent a minor shift primarily intended to

enhance time efficiency, or it could serve as an accountability measure to monitor and uphold a shift intended to transform hiring processes and outcomes.

*Structural change* within an organization pertains to how individuals are organized to fulfill responsibilities and how roles, tasks, and activities are configured to align with the organization's objectives (Zheng, Yang, & McClean, 2019; Skivington & Daft, 1991). These changes prioritize the organizational infrastructure and often serve as mechanisms for establishing and reinforcing new internal frameworks and schemas. For example, if an organization were to dissolve its Human Resources Department and establish a broader "Community, Inclusion, and Belonging Department" tasked with managing traditional HR functions and expanded internal and external engagement objectives, this restructuring would exemplify organizational structural change.

In organizational change, *attitudinal change* centers on modifying employees' personal values and belief systems. Harnessing these shifts in attitude can play a pivotal role in shaping and transforming organizational culture (Welton et al., 2018; Kezar, 2001; Legate & Weinstein, 2024). Unlike process or structural change, where organizational leaders can prescribe, monitor, and enforce behaviors and actions, attitudinal change presents a different dynamic. Employees' engagement in attitudinal change efforts is driven by their values and beliefs, which significantly influence both conscious and unconscious behaviors and are less directly controlled by leadership (Piderit, 2000; Armenakis et al., 2007; Weiner 2008; Choi, 2011; Onyeneke, & Abe, 2021). Navigating the complexities of shifting these deeply held belief systems requires careful attention to individuals' readiness and willingness to change. In sum, process level change focuses on

*how* things are done, structure level change focuses on *what* is done, and attitudinal level change focuses on shifting *mindsets, behaviors, and cultural norms*. Integrating all three approaches to organizational change is crucial for effective change implementation and sustainability, particularly for achieving transformational DEIB change.

### **DEIB Focused Organizational Change**

The specific components of organizational DEIB change efforts vary for each organization and are typically assessed through methods like conducting an equity audit or enlisting the services of a DEIB consultant to evaluate the strengths and areas for improvement in the organization's DEIB initiatives. (Hill & Curry-Stevens, 2017; Lambert, 2017; Ray, 2019). Zak (2020) recommended three places for organizations to start their DEIB journey:

1. Define what “equity, diversity and inclusion” mean to you and your company.
2. Define which areas of diversity and inclusion you want to focus on first.
3. Determine how leadership will support the DEIB strategies.

The first recommendation, defining the three terms is necessary because there are many ways of understanding DEIB in the workplace.

### **Equity**

In a society founded on principles of equality, where ideologically every person is entitled to exactly the same access to a given resource, regardless of actual need or want, principles of equity can be perceived as counter to traditional notions of fairness in both personal and business settings. In organizational change, equity work is necessarily and purposefully disruptive to traditional ways of doing business. It requires engagement and

disruption at multiple levels. At the individual level it requires critical self-reflection and agency; collectively an equity focus requires advancing new policies and narratives to include what is possible and has been intentionally ignored or omitted; and institutionally, equity requires that organizations do business differently to work in solidarity with social change movements for more meaningful and sustainable impact (Lambert, 2017; Pitner & Sakamoto, 2005). While some organizational changes might only be technical or tactical and represent process or structural changes, the work of integrating an equity mindset into an organization's DNA is a fundamentally transformative change. It requires changes to core beliefs, priorities, habits, and loyalties and these attitudinal changes may even require changes to beliefs and ways of being that contributed to the organization's past success. At some point, an organization's focus on equity will challenge past practices in ways that challenge both professional and personal beliefs for all members of an organization (Open-Source Leadership Strategies Inc, n.d.). Examples of the three primary areas of change for equity-centered change might include:

- *Process Change:* Altering the interview process by sending interview questions to candidates via email 24 hours before their interview, ensuring a more equitable experience. Traditional methods of verbal questioning may favor candidates who excel at auditory processing or spontaneous speaking, disadvantaging those who prefer visual information or need more time to formulate responses.
- *Structural Change:* Establishing an Ombuds position within the organization. Typically, the ombuds role serves as an impartial advocate and mediator, providing confidential and neutral support to individuals with equity, fairness, or

discrimination concerns. The ombudsperson may identify practices that unfairly advantage certain individuals, as well as systemic discrimination within the organization, and they recommend policy changes or interventions to enhance equity and fairness for all employees.

- *Attitudinal Change*: Transitioning from a belief in strict uniform treatment of all employees with identical resource access, to an understanding that fairness may also entail providing resources based on individual needs. This shift acknowledges that equitable distribution of resources may sometimes result in varied access or allocation based on specific requirements, ensuring fair provision of resources as needed.

### **Diversity**

Difference and diversity can be based on an immeasurable number of attributes such as the obvious ones that are observable and more easily detectable (e.g., age, race, gender, occupation) and the less observable (e.g., family structure, educational attainment, neurodiversity, and organizational tenure). These attributes can serve as critical group identifiers in an organization. Workplace diversity can be described as “the degree to which the organizational workforce consists of people with different background characteristics” (Peretz, Levi, & Fried, 2015, p. 875). Most commonly, in DEIB focused change, organizations focus on diversity, or the multiple identities, backgrounds, cultures, perspectives, and lived experiences represented (Kalinowski et al., 2012; McGuire & Bagher, 2010) in their hiring, retention, and marketing

practices. Examples of the three primary areas of change for diversity-centered change might include:

- *Process Change:* Providing agendas in advance of the meeting to accommodate and demonstrate recognition of the various ways that people like to approach and prepare for team meetings. For instance, some people like to know what to expect and be prepared to discuss meeting topics in advance, while others may not need information prior to the meeting.
- *Structural Change:* Establishing Employee Resource Groups (ERGs) to provide support, networking, and advocacy opportunities for employees from underrepresented groups. ERGs may focus on specific demographics such as race, ethnicity, gender, sexual orientation, or disability, and serve as a platform for employees to share experiences, provide mentorship, and advocate for change within the organization.
- *Attitudinal Change:* Acknowledging that diversity in lived experiences, thoughts, and perspectives leads individuals to approach problem-solving and work methods differently. Transitioning from the notion that there is only a single correct approach, or that one's own approach is superior, to recognizing that there can be multiple effective ways of achieving objectives.

### **Inclusion**

To understand inclusion in the workplace, we look at how leaders, groups and individuals within an organization create and maintain environments that allow employees of all backgrounds and organizational levels, “to participate, contribute, have

a voice, and feel that they are connected and belong, all without losing individual uniqueness or having to give up valuable identities or aspects of themselves” (Ferdman, 2013, p. 12). Most important about this workplace inclusion is its function of “recognizing, appreciating, and leveraging diversity so as to allow members of different cultural and identity groups . . . to work together productively without subsuming those differences and, when possible, using those differences for the common good” (p.12). Inclusive practices ensure balanced representation throughout the organization, enhance individuals’ sense of belonging, and provide employees with an equal voice in the creation of organizational norms, values, and definitions of success.

With inclusion there is a high sense of belongingness, and a high value is placed on uniqueness. When employees experience inclusion When employees feel included, they are treated as, and feel like an insider, all while retaining their individuality. With assimilation there is a high sense of belonging, but a low value is placed on individual uniqueness. Assimilation occurs when the employee is regarded as an insider when they conform to organizational norms, often downplaying their unique traits (Shore, & Chung, 2022). Examples of the three primary areas of change for inclusion-centered change might include:

- *Process Change:* Implementing flexible work policies that accommodate employees' diverse needs and preferences, such as remote work options, flexible hours, and compressed workweeks. This allows employees to balance their work and personal responsibilities more effectively and promotes inclusivity for individuals with varying schedules or caregiving responsibilities.



- *Structural Change*: Establishing robust mechanisms for feedback on diversity and inclusion efforts, including surveys, suggestion boxes, and regular meetings with ERGs, to continually adapt and improve strategies.
- *Attitudinal Change*: Encouraging open and honest communication among employees at all levels of the organization. This includes creating a culture where individuals feel comfortable sharing their ideas, opinions, and concerns without fear of judgment or reprisal.

### **Belonging**

In the context of DEIB, "belonging" is a relational phenomenon that refers to creating an environment where every individual feels accepted, valued, and included regardless of their background, identity, or characteristics. It goes beyond mere representation or diversity; it's about fostering a sense of connection and acceptance across difference within an organization (Kunde, 2023). Belonging emphasizes individuals feeling comfortable being their authentic selves, knowing their voice is heard, and they can fully participate and contribute without fear of discrimination or bias. Fostering a sense of belonging the workplace involves recognizing and respecting the unique perspectives, experiences, and identities of all individuals and actively working to eliminate barriers to inclusion and participation (Kunde, 2023; Kennedy, 2021; Mor Barak, 2015). Examples of the three primary areas of change for belonging-centered change might include:

- *Process Change:* Regularly conducting audits of existing processes to identify and eliminate any that may inadvertently exclude certain groups or individuals, ensuring that all organizational practices contribute to a sense of belonging.
- *Structural Change:* Including diversity and inclusion goals as key performance indicators for leadership roles, ensuring that leaders are accountable for fostering a sense of belonging within their teams.
- *Attitudinal Change:* Establishing a universal expectation that every employee, regardless of position or personal background, is accountable for contributing to a sense of belonging and for challenging exclusionary behaviors when they see them.

The crux of developing organizational capacity and embarking on DEIB initiatives lies in the nature of the change that occurs. The pivotal question revolves around whether the change is merely surface-level and temporary, leading to a regression to previous norms, or if it constitutes a profound and enduring transformation. For transformative DEIB change, it is crucial to address not only the organizational structures and procedures but also the attitudes and behaviors of its individuals and stakeholders. This involves promoting diverse representation across all levels and integrating principles of diversity and inclusion into every facet of the organization's mission. Leadership's focus on diversity and inclusion requires a thorough review and deliberate modifications in the organization's overall culture, strategy, programming, products, structure, resource allocation, internal operations, communications, advocacy, and external relationships.

**Motivation and DEIB Change**

Motivation influences individuals' behaviors and actions and drives their willingness to actively participate in DEIB initiatives. When situated in the context of leading DEIB transformation in a work environment, the nuances of intrinsic and extrinsic motivation can be critical determinants for understanding and leveraging motivation for successful organizational change.

***Intrinsic Motivation***

Intrinsic motivation refers to the inner drive or desire to engage in an activity for its own sake, rather than for external rewards or incentives (Ryan & Deci 2000). When individuals are intrinsically motivated, they are driven by their own personal enjoyment, curiosity, or interest in the task at hand. This type of motivation arises from within the individual and is often associated with feelings of satisfaction, fulfillment, and autonomy. Intrinsic motivation arises from the inherent enjoyment or value derived from the activity itself. Examples of intrinsically motivating activities include pursuing hobbies, engaging in creative endeavors, or seeking personal growth and mastery. Intrinsic motivation is closely linked to factors such as autonomy, competence, and relatedness, as individuals are more likely to be intrinsically motivated when they feel a sense of autonomy and competence in their activities, and when they perceive their efforts as meaningful and connected to their personal values and goals. Individuals who are intrinsically motivated are more likely to persist in the face of challenges and setbacks, contributing to the sustainability of the activities and initiatives over time (Chui, 2017; Ryan & Deci 2000).

***Extrinsic Motivation***

Extrinsic motivation refers to the drive to engage in activities or behaviors in order to attain external rewards or avoid punishments (Ryan & Deci 2000). Unlike intrinsic motivation, extrinsic motivation is influenced by external factors such as money, praise, grades, or social approval. In the workplace, external rewards such as bonuses, promotions, or recognition such as public praise or awards can motivate employees to achieve specific goals or targets set by the organization. These tangible incentives and rewards can boost morale, enhance job satisfaction, and reinforce desired behaviors and performance, driving employees to perform at their best, contributing to the overall success of the company. Extrinsic motivation is also driven by external consequences, such as disciplinary actions or warnings. It can motivate employees to comply with organizational policies, procedures, and standards of conduct. The threat of negative repercussions can deter employees from engaging in misconduct or violating company policies. In sum, extrinsic motivators play a valuable role in motivating employees, driving performance, and achieving organizational goals. Extrinsic motivation can be a useful tool in motivating people. However, although it can effectively prompt behavior in the short term, it may not lead to sustained engagement or intrinsic satisfaction. Additionally, reliance on extrinsic rewards or punishments may undermine intrinsic motivation and diminish individuals' intrinsic interest in the activity over time (Chiu, 2017; Ryan & Deci 2000).

In organizational change, motivations and perceptions of motivation shape how individuals interpret and respond to DEIB policies, practices, and training programs,

ultimately impacting the effectiveness of these interventions in promoting inclusive behaviors and attitudes. Individuals who are intrinsically motivated to engage in DEIB efforts often do so because they genuinely believe in and value the principles of diversity, equity, inclusion, and belonging. This leads to more authentic and consistent advocacy and action where initiatives are more likely to be sustained over time, even in the face of challenges. Furthermore, individuals are more likely to go beyond standard procedures and think critically about how to make real change and progress. At the leadership level, leaders who demonstrate a genuine commitment to diversity and inclusion can inspire similar attitudes in their teams, setting a tone that promotes an inclusive culture throughout the organization (Chiu, 2017; Ezell, 2024).

Not to be overlooked or underestimated, extrinsic motivations for DEIB initiatives also offer advantages and opportunities for DEIB advancement in organizations. For instance, many organizations pursue DEIB initiatives to comply with government regulations and avoid legal consequences (i.e. anti-discrimination laws, equal employment opportunities, and other statutory requirements), out of a desire to enhance an organization's public image and reputation, or for financial benefits associated with DEIB which can drive initiatives that capitalize on the economic advantages of a diverse and inclusive workforce. Even though these approaches may not necessarily foster a deeper cultural shift towards inclusivity, they do ensure at least a minimal investment in DEIB efforts. Extrinsic motivation can kickstart DEIB initiatives and achieve certain benchmarks, and for those who desire deeper, more longstanding transformations, the challenge often lies in transitioning from extrinsically motivated efforts to embedding

more intrinsically held values and motivation within the organizational culture (Chiu, 2017; Ezell, 2024).

### **Transformational Change**

Organizational change may be, but is not always, transformational. In many cases, change is adaptive. Organizational development literature describes these kinds of change as "first-order," or "single loop," alpha change and "second order," "double-loop" gamma change (Argyris & Schon, 1978; Golembiewski, Billingsley, & Yeager, 1976; Watzlawick, Weakland, & Fisch, 1974). Before discussing DEIB-focused organizational change, the characteristics of both adaptive and transformational change are presented.

### **First-order Adaptive Change**

In organizational change, first-order change accounts for “minor improvements and adjustments that do not change the system’s core, . . .” (Levy & Merry, 1986, p. 5). These adaptive types of changes are often minor, incremental and impact just one part of the organization or system; for example, a change in roles, scheduling or a process is adaptive (Adserias et al.; 2017; Kezar, 2001; Oakes et al., 2005; Perkins et al., 2007). Additionally, first-order change is not meant to interrupt or bring change at the structural or cultural levels, nor does it interfere with the organization’s values, mission, or purpose. On an individual level, first-order change focuses only on behavior, is incremental, and transactional and these are the clarifying elements of first-order change. Transactional change is a modification to systems and processes in which individuals interact (Henderson 2002), and there are no deeper expectations of change, such as individuals’ perceptions of their role in the organization or organizational structure or goals.

Furthermore, organizational theorists Eckel and Kezar (2003), argue that transactional change can be understood as an *absorption* of new elements into existing policies and practices in ways that *buffer* and in no way threaten the stability of the existing organizational structure and culture.

### **Second-order Transformational Change**

Second-order change represents a fundamental reframing of the “underlying values or mission, culture, functioning processes, and structure of the organization” (Kezar, 2001, p.16) and “. . . implies a paradigm shift . . . [that] is transformative or revolutionary . . .” (Perkins et al., 2007 p. 304). Second-order change can be understood from reviewing definitions of transformational change. In his research on transformation, Mezirow (1997, 2006) theorized “Change is transformative when individuals, groups, and organizations arrive at new perspectives and actions that greatly differ from their past views and behaviors” (Lambert, 2017, p. 7). In a synthesis of transformational learning and change in organizations, Henderson (2002) concluded “Transformational change in organizations involves radical changes in how employees perceive, think, and behave at work” (Cummings & Worley, 1997; p. 186). Similarly, others concluded in an organization, transformational change occurs when core elements such as values, norms, and rules of the culture are altered in ways that go beyond minor modifications to the status quo or small tweaks to make the organization better (Burke,1992; Cummings & Worley, 1997; French & Bell, 1999; Henderson 2002; Nevis et al., 1996; Walton, 1999). Transformational change is complex and challenging, leading to a “fundamental change of the character and culture of the organization” (Henderson, 2002, p. 189). There are

clear distinctions between adaptive and transformational change. While adaptive change focuses on surface-level improvements and incremental adjustments, transformational change delves deeper, fundamentally altering the organization's underlying values, culture, and structures. Through this differentiation, it becomes clear that transformational change, though more complex and challenging, is essential for achieving substantial and enduring improvements within an organization.

### **Challenges of Leading DEIB in the Workplace**

While there are numerous advantages to cultivating DEIB in the workplace, one of the primary hurdles in implementing and maintaining such change lies in confronting entrenched attitudes, personal values, and belief systems among employees within the organization (Hill & Curry-Stevens, 2017; Lambert, 2017; Ray, 2019). Leading change expert John Kotter (1996) argued that organizational readiness for change is critical for successful change endeavors, with a crucial component being the extent to which employees are psychologically and behaviorally prepared to embrace and enact change. Employees' engagement in attitudinal shifts is influenced by both conscious and unconscious behaviors and they have agency in choosing to reinforce or reshape their personal values and beliefs. In organizational settings, individuals often strive to uphold familiar organizational cultures and practices that enhance their sense of identity, control, and psychological well-being (Argyris & Schon, 1978; Hirschhorn, 1988; Schein & Bennis, 1965; Weiner, 2008). Consequently, the feasibility and likelihood of accomplishing and sustaining DEIB change efforts are intricately linked to and reliant upon the willingness of leaders and individuals within the organization. Attitude and



psychological readiness are pivotal factors in any organizational change initiative. The literature underscores that procedural, structural, attitudinal, and personal changes can all occur independently or as isolated endeavors. However, for the desired DEIB change to have enduring impact on the organizational culture and infrastructure, efforts toward personal and attitudinal change must complement procedural and/or structural initiatives (Hill & Curry-Stevens, 2017; Korach, 2011; Ray, 2019). The sustainability of DEIB change hinges on personal and attitudinal transformations, which are essential for upholding procedural and structural adjustments over time, ultimately fostering authentic transformation. True transformative change in DEIB work cannot materialize without accompanying attitudinal and personal shifts.

### **Leading Personal Change**

For people, personal identity develops through their association with, or exclusion from, specific social groups (Tajfel & Turner, 1986). This identity is further influenced by various factors such as cultural, political, social, economic, and historical circumstances. Often, identity is shaped at the intersection of multiple affiliations. Individuals belong to several groups, each representing distinct identities that hold varying importance depending on the social context (Pitner & Sakamoto, 2005). As individuals navigate these contexts, they must also navigate the prominence of their different identities. Through this process, their understanding of self-identity and the importance of certain identities evolves, shifts, and sometimes undergoes redefinition. These shifts, also known as identity shifting, are defined as “self-altering strategies that individuals utilize to cultivate a sense of belonging and meet the perceived demands of their social surroundings” (Loyd

et al, 2023, p. 701). For example, an employee who identifies as male and Muslim, might be more aware of his identity and experiences in terms of gender in a team meeting where he is the only person who identifies as male, but in a situation where he is invited to an employee event hosted by the Christian employee support group, he may be more aware of his identity and experiences as a Muslim. In this case, the salience in his self-identity shifts based on contextual and relational experiences. Recent research conducted by Loyd et al. (2023) emphasized that identity shifting can take on active or passive forms as conscious or unconscious behavior. Frequently, individuals undergo these shifts without being aware of them. As a result, cultivating DEIB change necessitates practices that encourage individuals to first reflect on and contemplate their own identities and how they navigate social spaces. This process involves reflecting on experiences of prejudice, bias, and stereotypes, all of which can influence shifts in perceptions of identity relevance and sense of belonging. Heightened self-awareness and understanding of these contextual dynamics often facilitate individuals' development of the willingness, commitment, and opportunities to become personally engaged and challenge barriers to supporting diversity, and inclusion in the workplace (Danielewicz, 2001; Pitner & Sakamoto, 2005; Seider et al., 2017).

It's equally, if not more, crucial for leaders to actively engage in this development themselves. Yet, for leaders, these efforts are complicated by the inherent position and privilege associated with their leadership roles, and how this intersects with their varied, personal identities and lived experiences. This complexity adds an extra layer of challenge to organizational readiness and the implementation of DEIB initiatives. It

suggests that even when focusing on business-centered DEIB change, there's a need for both organizational leaders and employees to have the opportunity and space to reflect upon their personal identities, experiences, values, and attitudes regarding diversity and inclusion—and a prioritized need for the leaders. To underscore this point, consider the fundamental concept that prejudice, biases, and stereotyping serve as barriers to equity and inclusion in the workplace. Prejudice involves preconceived judgments against or in favor of individuals or groups, not based on facts or personal experiences (Nelson, 2015). Similarly, bias is described as a prejudgment of others in the absence of individual-specific information (Latting, 1990), while stereotyping involves generalizing information about a few individuals to define an entire group (Pitner & Sakamoto, 2005). These phenomena uphold individual and structural barriers to DEIB change. When implementing DEIB change, all members of the organization will encounter these and other barriers that require awareness-building, attitudinal changes, commitments, and efforts to overcome ingrained, often implicit beliefs. In these circumstances, managers and other employees often follow the lead of senior leaders. Therefore, top-level leaders must model an active and direct approach to DEIB changes, both personally, and as a united and committed leadership team (Ng & Sears, 2018).

### **The CEO and DEIB Change**

In organizational leadership literature, CEOs are depicted as pivotal decision-makers who often establish and delineate organizational priorities and direct resource allocation (Cox & Blake, 1991). Positioned at the helm of an organization, CEOs occupy a unique role as symbolic leaders, publicly taking stances on issues and

thus serving as exemplars for the behaviors necessary for change and aiding in propelling the organization forward (Ng & Sears, 2018). Beyond merely modeling expected behaviors, CEOs also motivate employees to persist in their roles, even when the immediate benefits may not be apparent (Salancik, 1977). Likewise, superficial or dwindling commitment to diversity by a CEO can detrimentally impact the organization, particularly its DEIB initiatives (Ng & Sears, 2018). The success or failure of DEIB change efforts heavily hinges on the leadership of the CEO, as well as the collective leadership of other executive members. Consequently, the challenges they encounter individually and as a team carry comparable, and sometimes equivalent, importance in affecting change.

### **Theoretical Frameworks**

In Chapter one, critical consciousness (CC) was introduced as a paradigmatic lens in this study for analyzing and understanding the experiences of executive leadership team members engaged in DEIB-focused organizational change. Critical consciousness was originally defined as self-awareness of both one's situational and environmental contexts and the ongoing development of agency to bring about change to those contexts as a result of their new awareness (Friere, 1971). More succinctly, in a recent literature review, Seider and colleagues (2017) defined CC as "the ability to engage in reflection and action upon the world in order to transform it" (p. 1162), while scholars Pitner and Sakamoto (2005) described it as "the process of continuously reflecting upon and examining how our own biases, assumptions, and cultural worldviews affect the ways we perceive difference and power dynamics" (p. 2). CC is often used as a framework in

disciplines such as social psychology, clinical psychology, critical theory, counseling, social work, and feminist theory.

In its original conception Freire (1973) contended that CC is not achievable by oppressors or those in power as privilege often blinds them to the realities of oppression. He argued that the oppressors, benefiting from the existing social structure, lack the perspective needed to critically analyze and understand the systems of oppression. Instead, CC is typically developed by the oppressed, as they directly experience and confront the effects of oppression. It is the oppressed who, through their struggle for liberation, develop the critical awareness necessary to recognize and challenge oppressive systems.

Since Freire's original work, social justice-oriented scholars have refined and developed the concepts of CC. The evolution represents slightly differing historical and political contexts with broader conceptualizations of CC, yet the objectives of critical reflection, and elements of critical action aimed at promoting social justice are upheld (Diemer et al., 2021; Heberle et al., 2020; Sakamoto & Pitner, 2005). For example, recent scholarship delineates CC into three categories: critical reflection, critical motivation which involves the perceived ability or moral dedication to confront perceived inequalities, and critical action encompasses engagement in either individual or collective efforts to challenge, contest, and alter perceived inequities (Diemer et al., 2021; Heberle et al., 2020). These contemporary interpretations of CC and its attainment are better suited to contexts where the individuals advocating for critical action and social justice could also be perceived as "oppressors" or "privileged" and holding positions of power. Under

these circumstances, while those striving CC may not be perceived as “oppressed,” there is still a recognition and confrontation of oppression and inequities, and a quest for social justice and equity. CC underscores the significance of fostering self-awareness, reflective practice, and transformative action in leading DEIB change. In the context of DEIB organizational change CC can be used in describing the ability to recognize and analyze one's own position within social, political, and economic structures. It involves a heightened self-awareness of one's biases, assumptions, and the power dynamics that influence perceptions of diversity (Dalrymple & Burke 1995; Dominelli, 2002; Freire, 1973; Mullaly, 2010). It calls for continuous reflection, learning, and unlearning to transform beliefs and practices and reduces stereotypical thinking, “and the likelihood of imposing beliefs and value systems onto others” (Pitner & Sakamoto, 2005, p. 684). Scholars define CC as the intersection of critical reflection, motivation, and action aimed at challenging oppressive forces and fostering social justice and equity (Pitner & Sakamoto, 2005; Reed et al., 2011; Wallin-Ruschman, 2017). Fostering CC in executive leaders, who hold positions of power in the organization, is a common goal in DEIB change efforts.

Cultivating CC also involves a continuous examination of “how one's various identities, positionalities, and standpoints play in shaping one's worldviews and how these worldviews interfere with one's understanding of cultural diversity and difference” (Pitner & Sakamoto, 2005, p. 688). Within professional settings, critical self-reflection serves as a vital, self-aware form of introspection, involving the revisiting and questioning of motives, frameworks, assumptions, and actions. This process enhances

individuals' understanding of themselves and others within specific social contexts and this reflexivity fosters a deeper awareness of situational influences on behavior (Danielewicz, 2001). As such, CC provides an important paradigmatic lens and theoretical framework in this study.

### **Positionality Framework**

Another analytical lens for this study was positionality framework. Positionality involves an individual's comprehension of "...how their own identities are influenced by contextual factors... [and critically examining] how they position themselves within these contexts" (Pitner & Sakamoto, 2005, p. 686). For instance, an individual might experience privilege, or unearned advantage, due to their membership in certain groups or social categories (e.g., White, affluent male, heterosexual, Christian), or they may face oppression or disadvantage based on their membership (e.g., Black male, Muslim woman, individual experiencing poverty). Alternatively, an individual might experience both privileges based on one identity and oppression, or disadvantage based on another identity (e.g., affluent White and neurodiverse female or homosexual male). Adams et al. (2000) labeled privileged groups as "agents" while oppressed groups were labeled as "targets." Through this perspective, positionality enables individuals to examine their experiences as agents, targets, or potentially both, depending on their group affiliations. The roles of agent and target, as well as the inherent issues of privilege and oppression, "inevitably lead to a discussion about the power dynamics associated with memberships in socially defined categories" (Pitner & Sakamoto, 2005, p. 686).

In the context of this study, positionality is a framework for understanding how each leader's role might impact and even help define their experience in these DEIB-centered change efforts. The concept created space for consideration of the unique facet of positionality—the ever-present juxtaposition of self-defined social location and positionality and those assigned to us by others (Johnson-Bailey, 2012), especially executive leaders attempting to assert their role or agency in a given situation where they could also be challenged, dismissed, or undermined by others who see their social location (and thus their authority or positionality) differently. Transformative DEIB change leads us to question power, oppression, and inclusion in relation to one's "own positionalities and how these positionalities can lead to selective and biased information processing" (Pitner & Sakamoto, 2005, p. 686).

### **Chapter Summary**

This chapter explored literature relevant to the framing and understanding of a study on the experiences of executive leaders spearheading DEIB organizational change. The literature review began with the rationale behind DEIB change, including its moral and economic justifications and the activities and methods through which DEIB contributes to organizational outcomes. Next, organizational change was broadly defined, focusing on adjustments to internal structures, processes, and attitudes. This includes process, structural, and attitudinal changes, all crucial for achieving transformational DEIB goals. The chapter then examined organizational readiness, motivation, challenges in addressing entrenched attitudes and values among employees, and the pivotal role of leadership commitment in DEIB change efforts. The theoretical frameworks were



introduced as the analytical frameworks used in the study. CC and positionality emphasize self-reflection, exploration of social contexts, and critical examination of power dynamics. The next chapter outlines the research design for this qualitative exploratory study.

### **Chapter Three – Methodology**

In today's increasingly diverse world, workplace environments are being forced to evolve to be more inclusive to a broader diversity of employees. Organizational leaders are confronted with the challenge of supporting and sustaining transformational change that advances DEIB. Despite a wealth of literature on organizational change, a notable gap persists in understanding how executive leaders can effectively navigate and lead DEIB initiatives within their organizations. Traditional approaches to DEIB change often focused on one-off trainings, primarily emphasizing reducing discrimination and bias, and cultural competence (Flory et al., 2021). This approach frequently results in superficial outcomes and limited guidance for achieving lasting structural change. The development of more successful DEIB plans depends on organizational capacity and commitment and needs to be driven by top-level leadership.

Executive and senior leaders are seeking guidance on leading DEIB efforts, as ineffectively navigating this unfamiliar area of leadership can pose significant risks to both organizational reputation and personal career trajectories. Without insight into the journeys of other executives leading DEIB efforts, leaders may find themselves ill-prepared to navigate the complexities of implementing transformative DEIB effectively. This study addressed these knowledge gaps by exploring the roles and experiences of executive leaders driving sustainable DEIB change within their organizations. Through qualitative exploratory methods, the study uncovered the personal and professional experiences of an executive team, and provided insights into their leadership approaches, thought processes, and the emotional nuances of leading DEIB

change. By shedding light on these underexplored aspects of DEIB leadership, this study contributes to a deeper understanding of effective leadership in fostering inclusive organizational cultures. The research questions that guided this study were:

1. How do executive leadership team members experience their participation in a sustained DEIB-focused organizational change initiative?
2. What have the executive team members learned through their experiences engaging in the DEIB change initiative in their company?

### **Research Design**

As outlined by Merriam and Tisdell (2016), qualitative research seeks to uncover how individuals interpret their experiences, construct their realities, and assign significance to their encounters. In this methodology, I assumed the role of the research instrument and was primarily interested in discerning the prominent themes, patterns, and categories of meaning that arose from the participants. The substantial body of research surrounding organizational change in general, juxtaposed with the limited literature on the process and journey of spearheading DEIB organizational change at the executive leadership level, led to an exploratory approach for this study. An exploratory investigation facilitates a deeper comprehension of a subject lacking extensive prior research, allowing the researcher to observe a specific phenomenon without the goal of creating a solution (Corson, 2020). Marshall and Rossman (2016) characterize exploratory studies as intending to "investigate little understood phenomena; to identify or discover important categories of meaning" (p. 69). An exploratory, qualitative investigation seemed most appropriate considering current research and understanding of

the experiences of executive leaders leading DEIB change.

Unlike other change endeavors, a distinctive aspect of DEIB-focused change is that sustained second-order change efforts must consider both business objectives and the attitudinal or more personal, individual-oriented goals which are often influenced by an individual's or more personal, individual-oriented goals which are often influenced by an individual's positionality and perspective (Collins, 1990; Medina-Minton, 2019; Pitner & Sakamoto, 2005). Another advantage of employing an exploratory approach in this study is that it allowed me to adopt a broader perspective with the research questions. By utilizing a set of expansive open-ended research queries, the study more effectively gathered the requisite data from participants, which enabled a more flexible and adaptive investigation. Within this study, the inclusiveness of the guiding questions provided room for each participant to express themselves based on their distinct positionality, perspective, and experiences, while also providing me with nimbleness to navigate and adapt in response to the sometimes divergent and unique insights shared by participants.

As I collected data and the insights began to surface, the open and flexible design of an exploratory approach allowed me to naturally pivot to follow the direction of the emerging data to uncover the varying levels of depth of each topic. My ability to be responsive to the participant's feedback in real time was particularly critical given the uncharted and involved nature of the phenomenon being studied. For example, the personal and self-reflective nature of DEIB change work is complex and was further compounded by the participants' roles as individuals and members of a collaborative team. As such, the participants' experiences varied. Therefore, during the interviews their

individual levels of comfortability, what they chose to discuss, the experiences they highlighted as most salient, as well as their language and discourse competency for detailing their experiences all impacted my approach in the interviews in real time. This includes the level of interaction during the interviews, the language used for probing questions, providing more examples to help clarify a question, and my decisions about how to best probe deeper into emerging topics, particularly in moments when candidates were demonstrating high vulnerability during the interviews.

### **Site Selection**

Many companies across the nation are adopting new DEIB policies and practices, or simply continuing with their previous DEIB strategic plans and goals. Many of the efforts, however, focus primarily on training and other adjustments described as first-order change (Hunt et al., 2020; Lambert, 2017; Tyson, 2021; Vogel, 2021). In this study, I sought out a company committed to transformative DEIB change, challenging established value systems and norms to pursue adaptive, second-order change (Korach, 2011). While some organizations may opt for strategies that involve minor behavioral adjustments rather than structural shifts, this study prioritized a company implementing significant internal modifications more likely to catalyze second-order transformative change. In addition to considering the demographic composition of the site, the history of driving DEIB initiatives, their proximity, accessibility, and my pre-existing relationship with the site were critical factors in the selection. At the time of the study, I was engaged with the site as their DEIB consultant.

The company chosen for this study, “Tech Star,” is a mid-sized technology firm headquartered in the U.S., Pacific Northwest. There are approximately 225 employees along with a dozen interns. While the majority of employees are based in the U.S., fewer than 5% work abroad. The company's headquarters draws about 70% of its workforce from the surrounding region. Its selection for this study was based on both its size and commitment to advancing DEIB initiatives. Over a span of more than two years, the company has been actively engaged in comprehensive DEIB organizational change efforts, partnering closely with a consultant for DEIB executive coaching, training, and strategic operations.

### **Population and Sample**

Among the company's employees, 63% identified as White, 11% Black, 11% Latinx, 9% Asian/Pacific Islander, <1% Native American, and 6% identified with two or more races. In terms of gender, 52% were male, 47% female, and <1% identified as non-binary. The company's leadership comprised eight executives, eleven senior managers (VPs and Directors) reporting directly to executive leaders), and twenty-one managers, representing various roles such as sales, engineering, customer support, marketing, legal, product development, curation, accounting, and human resources. As a result of the COVID-19 pandemic, the company transitioned to primarily remote operations in 2020, with most employees adopting fully remote work schedules.

For this study, the selected participants were the company's CEO, seven other executive leaders, and the Director of People and Culture. These individuals were chosen to provide insights and perspectives on their experiences as high-level leaders actively

involved in driving DEIB change initiatives within the organization. Descriptive data for the leaders in the study are summarized in Table 1.

**Table 1: Participant Demographics**

<b>Pseudonym</b>	<b>Role</b>	<b>Gender</b>	<b>Race/Ethnicity</b>	<b>Age Range</b>
Dillon	Sr. VP	Male	White	41-55
Eli	VP	Male	White	25-40
Irwin	Sr. VP	Male	White	41-55
Bianca	CFO	Female	Asian American	41-55
Serenity	Director of People	Female	White	25-40
Eric	President	Male	White/Jewish	41-55
Isabella	VP	Female	White	41-55
Bailey	CEO	Male	White	55+

### **Data Collection Instruments and Procedures**

Utilizing a qualitative exploratory approach, this study gathered data through the following methods: conducting two interviews with each participant, totaling sixteen interviews; analyzing relevant company policies and procedures, encompassing a total of

five documents; and reviewing pertinent consultant notes. Initial data collection included the first semi-structured interview. In research, when we are unable to witness a situation, we can only rely on questioning others about their experience of the situation. Therefore, the interviews provided insight into the participants' perspectives, or rather their behaviors, feelings, experiences, interpretations, and how they made sense of their circumstances as they led DEIB change in their company (Merriam and Tisdell, 2016; Patton, 2015). Following Seidman's (2019) three-interview series approach, the study utilized a condensed approach consisting of two interviews: The first interview explored participants' experiences, while the second delved deeper into context and meaning. Typically, in an exploratory study, interview questions are broad and open-ended to allow data and themes to emerge organically from participants' shared perspectives (Polit & Beck, 2017; Reid-Searl & Happell, 2012). Key aspects of the interviews included:

- Both the first and second round interviews were conducted virtually, each lasting between 30 to 60 minutes.
- To ensure consistency, all interviews were conducted by a single researcher.
- Zoom audio, video, and transcript recordings were made for 14 out of the 16 interviews, with one participant opting not to be recorded.
- All recordings and transcripts were securely stored in a password-protected cloud-based account to maintain accessibility, confidentiality, and security.

Lastly, the study utilized document analysis as a form of triangulation. By examining data collected through various methods, I validated results and present a confluence of evidence, thereby mitigating the impact of potential biases that can exist in single data



research (Bowen, 2009). In this study, document analysis served several purposes: it provided contextual information, offered historical insights, suggested pertinent questions for inquiry, contributed valuable insights to the knowledge base, and enabled the tracking of changes and developments (Bowen, 2009).

### *Interviews*

Upon receiving approval from the institutional review board, I conducted individual Zoom meetings with the company's Chief Executive Officer (CEO), the seven other executive members, and the Director of People and Culture to introduce and explain the purpose and design of the study. During these meetings, the leaders were informed of the steps that would be implemented throughout the study to ensure confidentiality. They were also assured that their participation was entirely voluntary and that any decision not to participate would remain undisclosed to other leadership team members to ensure no adverse professional consequences. Following that meeting, each leader received an email invitation to participate (see Appendix B). This email provided a written detailed description of the research study, the amount of time and effort that would be requested of each participant, and a written assurance that the option to participate in the study was completely voluntary and confidential. The Informed Consent Form (see Appendix C) was attached to the email and this document described the minimal, yet potential risks, of participating in the study, as well as a listing of my committed efforts to maintain confidentiality and mitigate the participant's risk throughout the study. Within two weeks, all invited leaders expressed their agreement to participate and returned the completed Informed Consent Forms with no notable questions.

The first round of interviews aimed to put the participants at ease and build rapport with me as their interviewer, which facilitated candid recollections of the participant's experiences. Despite being a team, participants held differing beliefs and opinions about DEIB work and demonstrated varying degrees of comfort discussing DEIB issues and personal aspects of leading the work. The semi-structured questions were provided for review prior to the first interview in an attempt to minimize disconnected, irrelevant, or abstract answers. The first segment of the protocol consisted of four introductory questions intended to establish context and frame the discussion for participants. These initial inquiries, along with follow-up questions, focused on participants' identity and positionality and general reflections of their experiences leading the DEIB change efforts. The interview protocol employed open-ended questions to afford participants greater freedom in discussing their experiences and insights (see Appendix D). While the protocol questions remained consistent across all participants during the first round of interviews, its semi-structured format also allowed for adaptability and follow-up. For example, four participants were asked further questions about their experience working with a consultant or how they believed their personal identities may have, impacting how they experienced or were perceived in the work. Probing follow-up questions encouraged participants to elaborate on previous responses, address new areas of awareness, and discuss unforeseen perspectives or topics. Furthermore, this semi-structured approach accommodated the unique experiences of leaders based on their positions within the company and their diverse areas of expertise.

The questions for each second-round interview (see Appendix E) depended upon the participant's responses in the initial round of interviews and the review of documents. This round of interviewing provided an opportunity to dig deeper into previously addressed topics, as well as to explore new and developing themes and insights. The second round of interviews featured questions aimed at eliciting participants' opinions, information, and sentiments regarding the emerging themes (Patton, 2015). Participants were also invited to reflect on their experiences and share any additional insights they deemed relevant.

### ***Company Documents & Consultant Notes***

Triangulation, or the use of multiple data sources, enhances internal validity and various types of documents can aid researchers in uncovering meaning, developing understanding, and gaining insights relevant to the research problem (Merriam & Tisdell, 2016). In this study, document analysis of company documents and notes from the company's DEIB consultant were employed to corroborate findings across different datasets. Five company documents were collected and analyzed for this purpose: DEIB Leadership Team Meeting Notes, Diversity Hiring Rubric, Hiring Review Meeting Notes, past Culture and Climate Survey Results, and the Recruitment and Hiring Manual. Additionally, the consultant's notes, which documented company activities, executive coaching sessions, overall progress, and notable incidents related to the DEIB initiative and the executives' experiences, were also analyzed.

The documents were collected during the first round of interviews. They were obtained from both the consultant and the Director of People and Culture. These

documents were reviewed and analyzed after the first round of interviews and then again after data coding. To triangulate the data, the initial insights gleaned from document analysis were then incorporated into the formulation of interview questions for the second round of interviews, resulting in deeper understanding, clarification, and validation of interview data. After the interview process, I examined the documents for content pertaining to emergent themes of motivation, challenges, lessons learned, and advice for other executive leaders driving DEIB organizational change. These findings will be provided in Chapter Four.

### **Data Analysis**

Bernard (2018) characterizes qualitative data analysis as the endeavor to discern patterns within data and to formulate explanations for the presence of those patterns. Expanding on this concept, Saldaña (2021) proposes that patterns serve as indicators of stability and “become more trustworthy evidence for our findings since patterns demonstrate habits, salience, and significance in people’s daily lives” (p. 8). Employing inductive and open coding techniques for data analysis, this exploratory study aimed to discover insights of the perspectives and experiences of executive leaders navigating DEIB-focused organizational change. In qualitative analysis, a code or symbolic researcher-generated interpretation of data, “can be an assigned phrase or simple word symbolizing a salient essence capturing, and/or evocative attribute for a portion of language-based or visual data” (Saldaña, 2021, p. 5).

Inductive coding begins with close readings of text and consideration of the multiple meanings inherent in that text. This approach then allows researchers to explore

the richness and complexity of qualitative data without imposing preconceived notions or theoretical frameworks. (Chandra & Shang, 2019). While open coding is closely related to inductive coding, it is commonly known as "initial coding," and this technique deconstructs qualitative data to determine similarities and variances (Saldaña, 2009).

To address the research questions, the data analysis process followed these steps:

1. Participants were interviewed virtually using the Zoom computer software. For those who consented, the interview was recorded (audio, visual, and transcription).
2. Transcripts were downloaded and proofread to ensure accuracy. My handwritten notes were also reviewed.
3. Prior to the second round of interviews, I reviewed the transcripts from the first-round interviews, along with the documents collected for analysis, to formulate group and personalized questions for the second round of interviews.
4. After the second round of interviews, step 2 was repeated.
5. All transcripts were scrubbed and underwent de-identification, with participants assigned code names to safeguard confidentiality. The transcripts were entered into Dedoose, a qualitative data analysis software, for analysis.
6. Transcripts were coded using inductive and open techniques. Dedoose was also utilized as categories and themes were constructed in analysis.

### **Interview Question Formulation**

After the first round of interviews, the transcripts and collected documents were reviewed to gain insights for generating questions for the second interviews. I scanned

documents for contextual information experiences and concepts that required further inquiry and clarification. In that process, the documents were reviewed for new information and additional information about what participants shared in the first round of interviews. Round two interview questions (see Appendix E) included items that were applicable to all participants, while other questions targeted specific participants.

### **Data Coding**

Following the conclusion of the second round of interviews, I adopted an immersive approach to become familiar with the transcripts. Approaching the task with openness, I then engaged in inductive, open coding, meticulously scrutinizing each transcript to discern noteworthy concepts and patterns. This process led to the generation of an initial list of codes, derived solely from the content participants shared during their interviews, encompassing individual words, sentences, phrases, and data segments. There was no reliance on pre-existing categories. After generating the list of initial codes (see Appendix F), similar codes were compared, juxtaposed and then grouped into broader categories and themes, followed by a secondary phase of refining and organizing based on similarities and disparities. These codes and categories were further analyzed to identify overarching patterns, concepts, or relationships present within the data, resulting in the identification of the themes. Next, the transcripts were subjected to a meticulous line-by-line review and analysis to pinpoint words and concepts that were pertinent to the two guiding research questions and were aligned with the conceptual frameworks. These excerpts were highlighted, and open codes were attributed to them. Additionally,

alongside manual highlighting and coding, I utilized Dedoose qualitative data analysis software to upload the transcripts and codes for tracking and further analysis.

After concluding the interview analysis, document analysis began. In addition to aiding in the formulation of interview questions, the array of documents and notes utilized in this study underwent coding to facilitate comparison with the interview analysis. This coding aimed to identify overlapping patterns, areas of convergence, and points of divergence among the codes. Through this additional coding, the emergent themes from interview coding were corroborated and further refined. The document coding process also remained open to considering new, pertinent codes that might have surfaced during the document review. The document analysis process supported the primary themes derived from the interview data analysis: motivations, challenges, lessons learned, and advice for other leaders.

The interviews and documents were analyzed through the lens and frameworks of CC and positionality, with a heavy reliance on participant quotes and authentic reflections, as these elements offer a more comprehensive representation and revelation of the participants' consciousness (Seidman, 2019). In addition to the participants' accounting and descriptions of their day-to-day experiences, the study seeks to uncover their deeper cognitive and emotional experiences of leading DEIB, including how their thinking, attitudes, and actions may have evolved and changed over time. CC is a central lens because of its focus on an individuals' ability to critically examine and understand the social, political, and economic structures that shape their lives. It involves being aware of power dynamics, questioning societal norms and structures, and recognizing

inequalities and injustices. This lens is significant because it provides a framework for analyzing how the executives navigated the complex personal and intergroup dynamics involved in leading DEIB change as a leadership team. As an analytical tool, CC assisted the researcher in describing and highlighting phenomena that aren't easily observable, such as the thoughts, feelings, intentions, and reflections of each participant. This type of data depends not only on participants' ability to recall their experiences, but also on their deeper cognitive processing of those experiences, helping the researcher understand how they make sense of and assign meaning to them.

A second analytical lens for this study was positionality framework. Positionality involves an individual's comprehension of "...how their own identities are influenced by contextual factors... [and critically examining] how they position themselves within these contexts" (Pitner & Sakamoto, 2005, p. 686). In the context of this study, positionality is an important lens for examining and understanding how each executive leader's multi-dimensional positionality impacts and even defines their experience in DEIB-centered change efforts.

### **Researcher Positionality**

In qualitative research, the researcher acts as the primary instrument, influencing both data collection and analysis through their positionality, perceptions, research inquiries, and professional background (Merriam & Tisdell, 2016). For instance, Frey (2018) suggests that factors associated with the interviewer, such as their positionality or perceived identity, could potentially bias or influence data collection and study outcomes. Given the nature of the study, in my capacity as the primary research instrument, it was



my responsibility to reflect on and acknowledge how my personal identity, positionality, and perceptions might have impacted the study, particularly regarding data collection and analysis.

My affiliation with the company began shortly after the tragic death of Mr. George Floyd. The CEO, deeply affected by the murder and ensuing racial upheaval, committed to a deeper emphasis on diversity and inclusion in the company, specifically focusing on equity and advancement for the Black community. I was brought on as a DEIB consultant tasked with collaborating with the executive team to further diversity and inclusion objectives. Among my duties as consultant were facilitating confidential individual coaching sessions and team discussions on sensitive topics. These interactions often required a high level of mutual trust and vulnerability between me and the leaders. While the existing relationship may raise concerns about potential bias in the study, an advantage of the relationship was it encouraged a sense of familiarity and comfort among the participants during the interviews. As a result, they likely participated with greater depth, transparency, and openness. Moreover, in qualitative research, understanding the context is essential for interpreting participants' experiences accurately, as emphasized by Seidman (2019). The collaborative nature of our working relationship provided a shared understanding and context of the leaders' roles, the intricacies of specific situations, and the terminology used, which helped to enhance the richness and accuracy of the gathered data.

In conducting this study, I found myself in a predominantly white male leadership environment and as consultant, my role included DEIB coaching and facilitating

discussions among the leadership team regarding strategies for enhancing diversity, inclusion, and supporting professional advancement in the Black community, and aligning these efforts with the company's business mission. As a Black woman consultant and leader in a space where Black women are typically underrepresented and have limited influence in leadership matters, this context was significant. In such situations, being perceived as an outsider and encountering incidents of bias and stereotyping are highly probable. Fortunately, as a leader, I have extensive experience and training in navigating predominantly white business and leadership environments and I have learned to mitigate these challenges.

Successfully overcoming being a perceived outsider and navigating stereotypes means being aware of the stereotypes and the microaggressions that accompany these issues and finding ways to remain effective in my role in spite of them. Even beyond how I am personally treated, as a DEIB consultant and coach I often hear perspectives and opinions that I personally disagree with, dislike, or find harmful. However, when I am in that role, I compartmentalize and stay focused on the work objectives in the moment, and later I engage in reflective practices that help me process and assess my ability to continue work in a way that is authentic, healthy, and productive. These practices include journaling and talking through situations and the emotional toll with mentors and other DEIB professionals.

When the study commenced, I had been working with the company for two years as a consultant. As a researcher, I followed many of the same practices to help surface areas of potential bias and potential assumptions I may have held about each participant

given my tenure working with them. Specifically, to mitigate bias, before I started the interviews I journaled, reflecting on questions like, do I have emotional triggers with any of the participants and if so, what are they. I also wrote out the steps I should take if I was not sure of the participant's meaning or if my experience of what they were describing was vastly different. For example, during the interviews there were times when I journaled frustrations about a participant's comments. Their interpretation of a situation was different from my own and I was bothered by their perspective. I did self-reflection asking myself why is this bothering me, and considered whether there was anything about the discrepancy that was noteworthy in the study in comparison with how other participants experienced that situation? In other words, was there an insight relevant to the study, or was this a personal issue that should not be attached to my study interpretations or analysis? Similar to how in my work as a consultant my job was to move people towards specific objectives, regardless of my personal opinions or feelings towards them, as a researcher, my job was to capture data that reflected the participants' perceptions and interpretations of their experiences. If ever I was unsure of the meaning or reference in a participant's comment, I followed up with clarifying questions and asked for specific examples when possible. Additionally, as the researcher I approached the study with an inherent belief that DEIB initiatives must be led from the top and supported by senior leadership to be effective, and DEIB has to be integrated into the core business mission and goals for sustainable impact.

### **Ethical Assurances**

Merriam and Tisdell (2016) describe quality studies as those demonstrating credibility and trustworthiness. Establishing the credibility and trustworthiness of the study is critical for ethical assurances, in addition to producing a reliable and valid study. As such the research design process prioritized construct validity and reliability of the data collection methods, as outlined by Yin (2018). To achieve construct validity, or “correct operational measures for the concepts being studied” (p.42), multiple sources of evidence were used. The study design incorporated three data collection methods, interviews, company document analysis and consultant document analysis. With the multiple data collection methods, data triangulation was possible. Maxwell (2013) suggests that multiple data sources: help guard against the inherent biases of single-method approaches; increase the reliability and credibility of the research when the findings are consistent across the multiple data sources; provide varied perspectives and a more comprehensive understanding and broader range of insights and nuances and allow for richer interpretation through exploration of different dimensions of the research topic. In summary, triangulation can lead to deeper insights and implications in the research findings (Maxwell, 2013).

To prioritize the safety and confidentiality of the participants’, informed consent was required from each leader prior to interviews (see Appendix C); Interview data was scrubbed of any information that could identify or be linked to any one participant. Pseudonyms were randomly assigned to each participant and used on all data collection documents; and with participant consent, interviews were recorded using the Zoom

computer software. Seven of the eight participants consented to have their interviews recorded. Handwritten notes were created for the non-recorded interviews. The Zoom generated transcript was compared to the Zoom visual/audio recording to clarify and eliminate inaccuracies in the transcript. Interview transcripts were then uploaded and stored on a cloud-based, password protected drive, and uploaded to a password protected Dedoose account.

As mentioned, I served as the consultant for the participating site beginning in the summer of 2020. This relationship fostered a shared understanding of DEIB terms, philosophies, policies, and practices. Consequently, I actively mitigated bias stemming from prior knowledge or presumed knowledge through the reflexive practices I described previously when discussing my positionality as the researcher and consultant. By maintaining a routine of self-examination, I focused on deeper self-awareness and recognition of potential biases (Danielewicz, 2001). Additionally, asking follow-up and clarifying questions to participants helped to ensure accurate understanding of their intended meaning and perspectives, while also revealing any potential biases in my interpretation. In the rare instances when my understanding differed from what they conveyed, I took note of the specific content and context, periodically revisiting the list to see if any similar content or context appeared in other interviews. If so, I assessed whether follow-up questions were needed to ensure accurate interpretation. Reflecting and recording these instances, along with my thoughts, misinterpretations, and potential biases, helped me stay vigilant in minimizing bias in data reporting and analysis.

### **Chapter Four - Findings**

The purpose of this study was to explore and gain insights from the experiences of a team of executive leaders attempting to implement second-order, transformational change in their organization. In this study, this team of eight executives, representing various identities, diverse lived experiences, and different hopes and expectations for the DEIB work, explored their professional and personal experiences of leading organizational change focused on diversifying their company and incorporating principles of equity, inclusion, and belonging in the daily business practices and goals. The goal of this study was to surface an area of DEIB leadership rarely discussed– the DEIB change process from the executive leader perspective, with a particular focus on the experiences on the professional and personal levels, and as individuals and a team navigating DEIB organizational change. The exploratory research questions were:

- How do executive leadership team members experience their participation in a sustained DEIB-focused organizational change initiative?
- What have the executive team members learned through their experiences engaging in the DEIB change initiative in their company?

This chapter begins with personal identities, contextual information, and the professional role of each participant. These participant profiles describe how they understand their identities, roles, and positionality in the company. The profiles provide a glimpse of how each leader thinks about, communicates, and prioritizes identity and roles, and how they initially understood and approached the DEIB work based on those

contexts. Collectively, the profiles reveal some of the differences between these executive team members, including their identities, what is most important to them, their experiences navigating other's perceptions, the power dynamics associated with their roles in the company, and their fears and frustrations.

### **Participant Profiles**

As explained in Chapter Three, an exploratory study should “allow each participant to respond according to their own unique positionality, standpoint, and experiences.” The participants' background information and insights were collected through interviews. The emphasis on the individual experience is crucial for understanding how diverse lived experiences and motivations influence a team's experience of leading organizational DEIB change. The leaders of this study described the company where they work as a place where they “do heavy lifting” and “aren't afraid of hard work.” They explained, “we build the playbook as we go along” and often used the metaphor of “building the plane as we are flying it” to describe their company culture and their fearless approach to innovation. As such, the data presented centers the experience and perceptions of leaders against this organizational backdrop.

#### **Bailey**

Bailey is one of the company's founders and CEO. Most people know a CEO as the “Chief Executive Officer,” but Bailey also described CEO and his role as being the “Chief Encouragement Officer.” He felt a responsibility to ensure that the leaders of the company set the conditions for successful business, which included “having the right

people, the right processes, and the right products for customers.” In his interview, Bailey identified himself as a white American male but thought of that more as a “physical description” because “most people's identity is much more complex than that.” Leaning more towards a professional analysis of his identity, Bailey recognized the value of his identity. While some of the other executives discussed the ways their identity potentially hindered their ability to lead the DEIB work, Bailey focused more on how aspects of his identity enhanced his ability and thoughts about how to approach the work. Also considering his socio-economic status as a part of his identity, he explained:

When you have white American males talking about change, other white American males might say, “Oh, okay, I hear that person talking. Does he seem trustworthy? Does he seem logical? Do the things he says make sense to me?” Perhaps they'd be more influenced by hearing that from me versus a Black American female, for example. I think that's true with regards to the general things. I think my identity really goes beyond just those three attributes I described [white American male]. There is also my position as the CEO and being a person of relative success for my age. Therefore, in our company, when people hear me talking about what we desire to do and how we want to go about doing it, whether that's our business strategy or our sales momentum, they would be fortified and encouraged that we all can make these [DEIB] changes in a successful way, both for the company and our people.



Bailey showed up to the work understanding the ways in which he could leverage his identity and credibility to influence and encourage change in the company and beyond.

To give context to Bailey's beliefs and how he showed up in the work he provided a brief history of his background. Growing up in the 1970's he went to a high school in which 30% to 40% of the student body was Black. He and his sibling had Black friends and his sister had romantic relationships with Black men so from early in his life, he was exposed to racial diversity, and it was incorporated in day-to-day life. Admittedly, his career did not surround him with the same degrees of diversity as high school, but according to Bailey, the experiences he did have, along with the experiences of his formative years helped him to “more than understand, but really believe that there's an important aspect of the work [DEIB] that is beneficial and required for the resolution or integration of different minorities into America.” This proved to be a strong conviction for him throughout his interviews as he later added, “our goal and challenge is to keep ourselves and America awake and on a path that deconstructs institutional racism and constructs institutional integration, institutional diversity and inclusion.” Bailey was clear about his objectives, and he was able to consider them from professional economic perspectives, as well as more personal and social perspectives. He explained:

I truly believe that when people with different backgrounds and life experiences—degrees, education, people having different genders, race, ethnicity, where they went to school, who they grew up with— when the teams are more diverse, that's when they produce higher quality at faster speeds. The business

outcome is more likely to be better than it would be otherwise. That's the main underlying capitalistic rationale for doing the [DEIB] work that we're doing.

Personally, there's two other pieces that are less relevant per se to the business, but more relevant to the emotional connection.

Bailey went on to say:

If we can do this work in a way that is productive and profitable for the business *and* helps to deconstruct the systems that have held different groups back, then that's an extra bonus. To me that is an important and emotionally connected process because we're getting to do it for the benefit of both the company and its business mission, and it should benefit not just the people in our company, but in the communities that we serve.

These are sentiments Bailey held on to throughout the DEIB journey and repeatedly shared throughout the company to set the expectation and encourage others to join in the transformation. As Bailey's personal commitment and resolve for the DEIB work grew deeper, so too the company's momentum and the sustainable change began to flourish.

### **Eric**

Eric is one of the founding members of the company and serves as President. He has a strong presence in the company and in leading the DEIB work. He was passionate about bringing more diversity and inclusion to the company. In his interview, Eric talked about his own identity, and shared that when it comes to the question of identity, it's not something he thought about. He instead chose to describe himself "academically" as a

white male with a Jewish ethnic and cultural identity but explained, “I do not fully observe Jewish cultural and religious practices and beliefs.” Eric was raised in a liberal household and taught from an early age that “everybody's equal and we should be colorblind.” Growing up he had exposure to concepts of racism and institutionalized racism because it was a topic one of his parents had studied and written about. His experiences around race continued into his college years when in one job, his boss was Black as were many of his coworkers. In some ways, racial diversity in both his personal and professional life was common. He noticed a change when he moved to the Pacific Northwest for work. In his new city, he noticed the lack of diversity and his reflections shared:

I didn't pay attention until then, but I realized you can't just take diversity for granted. It doesn't happen naturally unless you live in certain areas or work in certain areas. Workplace diversity isn't something that just naturally occurs [in the PNW]. You have to be very proactive about it. So that had a personal effect on me.

For the interviews, some participants self-identified and positioned themselves more in terms of their leadership and role in the company. This was true for Eric. In describing who he was and how they showed up in the work, his “self” identification was intertwined with his perceived identity of the company. For example, he explained, “we are an inclusive place. We want our jobs open to everyone who wants one. We're not racist, we're colorblind and our systems are not biased towards certain groups.” Similar to how the other leaders reflected on how their awareness and understanding of their perceptions

of their identity grew, so too did Eric's awareness and understanding grow. He began to recognize ways in which his perceptions were not completely accurate. He said:

I think we felt like those things were true and that we had a good way of doing things, but at some point, we realized, no, that's not really true. It's all a lot harder than we imagined. It's going to take a lot more effort than we've ever put in or thought we needed to put in. Diversity and equity don't happen magically, and it wasn't happening organically.

There were other ways in which he described himself in terms of the DEIB work and his role in the work. When a consultant was hired to help the team, his colleagues had varying ideas of what the DEIB work would look like, but it usually involved them being engaged in learning and allowing the consultant to lead and do most of the heavy lifting. Unlike the other leaders, Eric saw himself as being more active in the process. He shared:

I thought my role would be demonstrating the importance of the work and that it's something that has to come from the top. It potentially impacts business operations and people need to understand that it's important that it's a worthwhile investment. I had to demonstrate commitment to it and help define how we were going to do it. I feel like I'm not just obligated, but it's my role to help create inclusion once people get here. I felt responsible for that.

Perhaps because of his sense of responsibility, Eric was one of the two leaders for whom there was never a time when he was so frustrated or when the challenges seemed so great that he wanted to quit or ease up on the new processes they designed to increase diversity

and inclusion in the company. Eric positioned himself to lead and take the work beyond the category of DEIB. He said, “this work isn't going to be limited by that DEI label. This work is about adopting good practices for being in business in general. It's not an optional, stand alone, or side category. How our company does this should let people know hey, this is how you operate to be successful; it's integrated into everything you do. A natural advocate for the work, Eric was one of the most passionate in the group, his presence and influence was strong. He believed it was his job to help convince people “it's worth investing energy and making change, even if it's not the easiest or most popular thing to do.”

### **Dillan**

Dillan, a Senior Vice President at Tech Star, showed up to his interviews ready to participate. He had worked for the company since its inception and demonstrated an obvious loyalty and dedication to the company and the executive team's success. Throughout the interview he was attentive and thoughtful with his answers and did not shy away from being candid in some of his responses. Diving right into the initial question, Dillon self-identified as “a middle-aged white male, a father, husband, leader, friend, and coworker.” In terms of this identity, he saw his personal and professional identities as both beneficial and potential hindrance at times. He believed, his age, tenure, and experience could be advantageous in establishing his credibility as a leader, which also led to him having positional authority when leading and navigating DEIB work and difficult conversations. He also recognized that in addition to credibility, his personal

experiences also showed him that being a middle-aged white male could present specific challenges such as others making judgements about him based on his role, company title, gender, or age.

Although he typically showed up as a confident leader, it was different with the DEIB work. In his experience, because he was a white middle-aged guy, people assumed that he did not and could not identify with them, he was instead somebody that lived a privileged life and wouldn't be as "well versed as people that came from traditionally underrepresented communities." While those potential judgements didn't seem to impact his leadership in the company, on a deeper, more personal level, he worried how those assumptions might cause others to dismiss his experiences and his intentions in the DEIB work. He explained:

Despite my experience as a leader, and experience managing difficult situations, I'm a middle-aged white male executive and in many respects, I think underrepresented communities might see my role, title, gender, age and view me as somebody that doesn't identify with them and somebody that has lived a privileged life.

He was also able to connect aspects of his personal identity to his identity as a leader and how it potentially impacted his leadership of the DEIB work. His worries about the stereotypes that might be associated with his identity and his lack of experience in DEIB work created and fed his fears about leading the work. This revelation shed light on the leader's initial response when asked to describe how he self-identified. He jumped to

clarify, immediately asking, “Are those things that are outside of my control? Things that I was born with, or both how I describe myself as well as things that I don't have control over, like skin color and things like that?” Dillon did answer the question, but he was clearly tentative in his approach and careful in how he chose to describe himself. This was one example of how, for even a seasoned, passionate, and confident leader, the uncharted territory of DEIB work can be unnerving and cause pause in even those most passionate about excellence and doing good in the workplace.

Dillon spoke in greater detail, further describing how his sense of personal identity, the initial discomfort of not knowing how to approach the work, and the uncertainty of how he was perceived by different people within the company all converged, leaving him to feel uncomfortable and less confident in leading the DEIB work. He shared:

Usually when you present yourself in a role that is leadership or management, people look to you for answers. In my role I've been confident in giving answers and knowing what to do, but when it comes to this topic, I don't have all the answers . . . in these DEI conversations my role is not the same. If somebody who comes from an underrepresented community and I show up to the same meeting and we are having an uncomfortable conversation about x, y, z or whatever related to DEI, it made me feel more uncomfortable knowing they were the ones we were referencing or talking directly about or I might be seen as one of the ones we are talking about– but on the “wrong” or “bad” side of things.

Despite his discomfort, Dillon pressed on in leading the work, and with time, grew stronger in his convictions. Not only was it “the right thing to do,” but as he experienced the outcomes of their efforts across the company and within his own team, he was increasingly convinced and willing to continue to stretch in his leadership to help move the work forward.

### **Irwin**

The Senior Vice President of Sales and Client Success, Irwin, brought an enthusiasm for the company and an invincible attitude. He had a strong sense of self and was succinct when describing his personal identity. His list included: husband, father, leader, coach, and athlete. From his perspective, in the workplace those identity markers are irrelevant. What he viewed as most important was “actions and how you show up.” He also shared that he thought others’ preconceived biases can make relying on personal identity markers a challenge in the workplace. He added, “As a 50-year-old white guy, I’ve experienced preconceived biases from others.” That is all he shared on the topic of self-identity.

Highlighting the differences in identity and perspectives within the executive group, Irwin expressed a different perspective on the company’s DEIB work. While he supported the principles of the DEIB efforts based of his belief that “all people are created equal and entitled to equal treatment,” ultimately for him, what was most important about the work was recognizing that diversity in approach, thinking and perspectives led “to better decision making and makes for better teams.” He also



recognized the value of the company becoming a leader in DEIB organizational change and understood their work advancing DEIB as a “business driver.” As such, he not only valued the mission of ensuring equal opportunity and building stronger teams, but he was also driven by the prospect of stronger business outcomes— increased sales in particular. Although some of his motivations were distinctly unique from his colleagues, Irwin considered himself to be one of the most committed and the “biggest champion” of the DEIB work on the team.

One other unique way Irwin showed up in the work was illuminated when he shared his values and conflict with some of the DEIB work. As he explained, “In the workplace identity is irrelevant. What’s most important are your actions and how you show up in the work.” To him, the new hiring policies that focused on diversity in hiring, placed too much focus on identity and led him to focus on identity markers and characteristics that he never considered prior to the DEIB work. He was accustomed to only considering candidates based on their experience and qualifications, not their identity. True to his sentiments and preference for a depersonalized, task and outcome approach to the workplace, his answers in the interview focused only on work.

Unlike his colleagues, there was no discussion of what he learned or how the work they did as a team impacted his personal life. His perspectives, approach to the work, and reflections of the DEIB work were all related to business outcomes. For example, in one way or another, most of the executives felt less confident leading DEIB work because of its personal and potentially political implications. The organizational

changes the team created were high stakes and for each of them, it was a new area of focus and leadership. Uncertainty and even moments of wavering were to be expected in the process. For Irwin, however, those factors seemed to have little impact on his experience. In his interview he explained, “It's easy to feel confident about being a part of advancing this work or any work. If you're going to decide to do something, you need to feel confident [in order] to be successful,” making confidence a result of willpower or discipline as opposed to it increasing or decreasing as a result of, or an accumulation of experiences. Furthermore, Irwin believed his role as leader was to “execute against the stated goal” whatever that goal was, DEIB or beyond. That belief seemed to drive his confident perceived abilities to navigate and lead this new work. The executives showed up to the work in different ways, yet they came together, did the hard work of developing shared goals despite their different perspectives and motivations, and successfully transformed company culture and policies.

### **Eli**

Eli, a founding member of the company, serves as the Vice President of Engineering and Technology. When asked to describe his personal identity, he provided a more detailed and nuanced description. He described himself as “just a regular person” from the PNW. Where he grew up there was political diversity but that was the only real form of diversity he recognized. In that environment, he did not think about himself as being a member of any group other than his family, political affiliations, or the specific community he lived in. He also did not think of himself as being white, and so today, he

still doesn't really think of his identity in terms of ethnicity or race. Nevertheless, understanding that he now lives in a different context, Eli also described his identity as "a white cis male who's married. . . I just consider myself to be a regular person." Out of the team, Eli seemed to be the most reflective of the group. He had deeply considered his background, his present-day perspectives, and his growing motivations for the DEIB work. He shared both personal and professional interests in the team was attempting to accomplish. On a more personal note, he shared:

Since I grew up in and have lived in not very diverse communities for a really long time, it is exciting and important to me to seek out different types of people with different backgrounds, to learn about them, to get to know them, to understand them.

His response could have been interpreted as him viewing the work as a superficial novelty or temporary interest, but he went on to explain, "this is an opening or an expansion of what I have experienced. That's part of what I am looking for in my life, an expansion beyond my previous and current experiences." Like most, Eli's personal perspectives heavily influenced his approach to the work and his lack of experience with diverse environments and relationships drove his curiosity and dedication to leading this work for his department.

Eli's sense of identity contributed to his belief that he could do any kind of work, no matter how difficult. He shared:

There weren't any real constraints or barriers put on what I could do as an individual or as a leader. It was just expected that I would progress in life, in successful ways and so I did. The expectations were that I would just "become" based on his schooling and how I related to the people I grew up with and in my community.

In approaching the company DEIB work, initially it was an effort to "wrap his mind around" what the company was trying to do and what he wanted to do in order to change his perceptions to approach the DEIB work. For Eli it had been normal to be in environments where all the people looked like him, so on a personal level, he had to first do work to recognize the potential issues in what he had long considered to be normal, as well as consider the potential benefits of changing things. Like the saying, "if it ain't broke, don't fix it," Eli was not convinced that something was awry and needed to be fixed. After all, he did not view himself as racist, nor did he discriminate in the workplace, and he saw racism and structural racism and vestiges of the past. Early on, Eli engaged in deep reflection about what the work meant for him both personally and professionally. Even as he continued to grapple with the politics, legitimacy, and reality of the work he was doing with his leadership team, he was committed from day one. What did resonate about the work was, if in fact people were blocked or didn't have fair access to the types of careers and opportunities that were offered by their company, simply because of their skin color, gender, economic situation, or any other unfair measure, he wanted to remove the barriers and ensure fair and equal access and opportunities at Tech Star. Eli clearly

saw the work as an opportunity to “change things in a way that's positive.” During his interview he shared, “It’s sad that people grow up not having that same experience that I did, where there wasn't anything that was off the table” and the more he learned about the historical and current contexts for DEIB work, the better he understood some of the inequities that exist, especially the ones that are unintentionally perpetuated in companies and institutions. He showed up to the work committed and ready to lead and those convictions only grew stronger as time progressed.

### **Bianca**

Bianca is the Vice President of Finance and People. She has worked for the company for numerous years and had the reputation of being a strong leader. She was also an advocate for the DEIB work. Bianca identified as a married Asian American woman. She has two kids and since her marriage is an interracial marriage, her children are bi-racial and for Bianca, being a parent of biracial children is an important aspect of her identity and experiences. Bianca also identified spirituality as an important part of her identities and explained, “I believe in helping people” and this aspect of her identity also shows up in her work role. Although Bianca sees herself as a “numbers person,” as a member of her executive team, she is the one who usually brings out the empathetic lens and helps the team consider how people may be impacted by the decisions they make. In that way she often brings forward the “human component” into their business conversations. Bianca feels compelled to show up and use her leadership influence to help people in that way. When asked what about the DEIB work motivated her, she answered,

“it's about righting the wrongs of the past and what it's done to society and in certain groups. We need to take a step somewhere.” Bianca is one of the two female executives and one of the three women on the leadership team. She understands firsthand some of the consequences of bias and discrimination in the workplace.

Given her past experiences of being a racial and gender minority in the workplace and her current experiences of being a woman and the only Asian American on the executive team, she shared,

I have a perspective that I feel like other people don't have. I'm used to being a woman in tech . . . and for me to fit in I have to golf, talk about cars and understand football and all those kinds of things. I want to be able to bring my whole self to work. I want to be heard, I want influence, I want my opinions to matter, and I want it to drive the direction of the company because DEI is important.

She went on, adding,

I just have a hard time shutting up. I think that's been my role. I've been stepping in more often than I probably should. I have made a difference though. I've been trying to influence; I keep trying to push. I still question, have I made a difference? Have my perspectives mattered?

In this study her perspectives indeed mattered. She too believed that “having more diverse people in an organization makes for better decision making and adds more perspective to the company story and impact.” She was driven by the hope that if people experienced the

benefits of that, they would change and believe more in the value of diversity, inclusion, and belonging. She explained, “I hoped to change our policies to make them more inclusive. I hoped we would change people's thinking to take into account other people's perspectives and actually incorporate them in our business practices and decisions.”

Bianca wanted to change policies and practices, along with hearts and minds. Although they may have different backgrounds, priorities in the DEIB work, and ways of expressing themselves, Bianca and her colleagues remained committed to their own goals, yet also put the goals and success of the team in the forefront of the DEIB work, which contributed heavily to their collective success.

### **Isabelle**

Isabelle is the Vice President of Marketing and self-identifies as female, and her gender identity is followed closely by her identity as a mother and wife. Even though she doesn't have a long list of identity markers, Isabelle showed up to her leadership role with many years of experience and intentional consciousness around being a woman in tech and what that meant in terms of being a part of an underrepresented group in her professional space. Adding to the fact that she was female in a predominantly male industry, as a female executive leader, she has even more insight into some of the equity and inclusion challenges in the workplace. She believed that her experiences positioned her to be a more empathetic leader and gave her “a deeper awareness of others from underrepresented groups, especially groups different than her own.” However, despite her

experiences of being underrepresented and not feeling totally “included” throughout her career, Isabelle still faced challenges in leading DEIB work.

Isabelle believed that being a white female on a predominantly white male executive team makes being heard and being taken seriously about her experiences a little harder. In that way she experienced her identity as “double edged sword” explaining, “it's hard being heard and taken seriously based on my own experiences because I think at some point it's not always easy for people to have empathy for others when they don't know what they've gone through.” Although that was hard to navigate, Isabelle still showed up to the work inspired.

### **Serenity**

Serenity has been with the company for many years and has an obvious devotion to the company and is committed to its' success. Serenity is the Director of People and identifies as a white female who uses she/her pronouns and was born and raised in the same city in the PNW. In the past few years, Serenity became more aware of how the city she grew up in and her associations were predominately white and lacked other forms of diversity. She revealed:

not living in or growing up in a diverse community some of the stuff we are working through in our DEIB work is stuff that I was completely oblivious to because it wasn't a part of my life or community. I had no way of being aware of it.



Serenity's gaps in awareness and knowledge weighed heavily on her, but she was no less eager to help lead the work. Her realizations only increased her curiosity and commitment to the work early on.

For Serenity, personal identity was equally important in defining and understanding her professional identity, and at times, it seemed to be the leading influence in her professional sense of self. In her interviews, she was one of the few participants who identified in ways that intertwined her professional and personal identity together. In describing her identity, Serenity identified first and foremost as a mother. She explained that not only is she a mother at home, but even in her work she shows up as a caregiver and nurturer. With pride she explained, "I'm very maternal in my work and how I manage people, how I think about my team, our full staff, and how I want to help people. I want to protect people. So that's a big part of my identity." That "mama bear" persona strongly influenced how she experienced and attempted to lead the DEIB change work.

Serenity's role within the executive team also influenced how she experienced the work. Her position and close working relationship with the executive team also played a role in how she self-identified. She was certainly a leader in the company and worked closely with the executive team and each executive, but she was not an official member of the executive team. She did not have the same positional authority or influence as the other executive team members and walked the line of being an "outsider within." While she knew that her colleagues valued and respected her, she still felt that she was

sometimes “dismissed or overlooked.” She admitted it was hard for her to know whether her perceptions were true, but nevertheless, they sometimes left her feeling like she was “just another worker bee.” Even though she may have had moments of doubt and uncertainty about the direction of the work, she was confident that it was the right work and important for racial and social justice, and she knew that she had a pivotal role in the success and sustainability of the work.

### **Themes**

The first theme, motivation, is presented in terms of the participants’ intrinsic and extrinsic motivations. The theme is shaped by the participants’ “why,” or rather what the driving forces were for them and their individual approaches to the DEIB conversations and work. This includes why they did not give up when faced with challenges and barriers or if the immediate consequences felt too challenging. For understanding each leaders’ experience, motivation is perhaps one of the most significant themes in this study as it showcases the teams’ range of perspectives and values, and how their motivations evolved over time. Along with the key findings for motivations, understanding what the participants perceived and experienced as challenges also proved to be necessary for a deeper understanding of what the work meant to them, what the work cost at times, and ultimately understanding their overall experiences leading the organizational DEIB change.

Understanding what the participants perceived and experienced as challenges also proved to be necessary for a deeper understanding of what the work meant to them, and

the cost of doing the new line of work. As the second theme describes what the leaders perceived as obstacles and challenges as they navigated the work, detailing these experiences at the personal and professional level. This section also offers insights on the teams' experience of navigating the range of perspectives, confidence and buy-in of the team. The third theme, lessons learned, consists of the participant reflections on what they learned personally and professionally from the process. These reflections include what they learned in terms of measurable and actionable changes in approaches, processes, and actions, as well as the less tangible lessons such as internal shifts in attitudes, beliefs, and expectations. In addition to learning, some of the participants also delineated between personal and professional gains from the DEIB efforts, and in more personal reflections, the individual benefits they experienced from going through the processes and extended conversations with their colleagues. The last theme, advice, covers advice that the leaders would offer to other executive leaders and CEOs interested in leading DEIB change initiatives in their organization.

### **Motivation**

In this study, motivation proved to be a fundamental theme in understanding the experiences of the executive team members' leadership of DEIB work. The study recognizes intrinsic and extrinsic motivations as distinct constructs, acknowledging their occasional overlap and the unique interplay within the leaders' individual motivations. Early in the initiative, the CEO's directives, and influence, seemed to be among the primary motivators for each leader. For four of the leaders, when the team began working with the DEIB consultant they were not personally motivated to lead the DEIB work.

While they may have valued DEIB in the workplace to some degree, it was not enough to create strong intrinsic motivation, or a significant “why” for doing the work. Those leaders also provided feedback that suggested that certain aspects of DEIB or what they perceived to be DEIB did not align with their values.

### *Early Motivations*

One leader spoke of how in the beginning, he didn’t really believe that the work would lead to significant change or have much impact beyond the specific goals they focused on. Similarly, another leader shared his initial experience in detail, explaining that he was primarily driven by the expectations placed on him by the CEO and the fact that everyone else on the team was compliant. He admitted he subscribed to the DEIB work “because we had to maybe not by choice of my own,” but he also believed “it was a good thing to do.” Another admitted frustration at having to take on the work, “I was like, why? We’re here to run a business. Why are we talking about this DEI stuff? We’ve got emails to respond to, meetings to attend and a giant to-do list. This is a distraction.”

These leaders were not alone. It was clear that the CEO was directing the company to focus on DEIB as an internal and external priority so there was not much choice if individuals wanted to remain employed at Tech Star. While there were no findings that suggested that any of the team members even considered not participating in the DEIB work, they were clearly positioned by these extrinsic motivators the way these leaders were expected to behave and participate, and how they had to comply to avoid a personal negative outcome or consequences. Aside from the CEO and President, only two people on the team described initial intrinsic, deeply personal motivators and would have been

willing to take on DEIB leadership even if they had not been directed to do so.

Regardless of whether the leadership team wanted to do the work or not, the leaders all signed on without protest or dissension, planning to dutifully follow the lead of the CEO and President, and fulfill their role as company executives.

### ***Extrinsic Motivation***

For each of them, the better they understood the business purpose, the more motivated they became. According to the CEO, “We all knew that we needed to do better in terms of diversity, it just needed to be connected to the business mission.” Often, the CEO recited and encouraged the team to think about the new DEIB focus as a business decision with business-driven goals. A key motivator and overarching reason for taking on the new focus was that a more diverse and inclusive company would lead to better business results, and that would lead to increased value and success for the company. That was a rationale and additional motivation they all recognized as a driving force.

As the team delved into the work, they experienced initial feelings of uneasiness and caution. For each of them, including the staunchest advocates, leading this kind of work was new and they recognized they had much to learn. As a principle they valued the welcoming of all people into their company, giving them opportunities to excel in their roles, and providing fair and equitable experiences. Beyond that however, developing the policies and practices to better support those efforts and work to “right social wrongs of the past,” was a new leadership challenge. Many of the leaders expressed dis-ease and feeling inadequately prepared because they lacked a solid understanding of the “how and why of leading this work.” This was particularly true of the recruitment and hiring work,

an area that represented the bulk of their change efforts in the company. They wanted more diversity within staff and leadership, but they were unsure how to achieve that in ways that were legal and did not exclude or discriminate against certain groups as they tried to increase certain demographics within the company. While many of them had ideas of how they could do that, initially there was little consistency and confidence in which would be the best path. Even though the challenges may have served as de-motivators, working as a team through the challenges was a source of encouragement and motivation. Despite their feelings of uncertainty, they were learning this new path of leadership together. One leader described, “we were able to take comfort and relax a little knowing they weren’t alone, and we had each other's back.” This extrinsic motivator worked well. As the team continued to learn and better define their work, they felt even more assured that they could succeed.

There were other motivations driven by external rewards. One leader reflected that in the beginning, he was simply in superficial problem-solving mode. The prospect of finding solutions, even if only short-term solutions, was his motivator in the work. He found the opportunity to “silence naysayers” and “put to bed all the noise around lack of diversity on the executive team and lack of diversity at Tech Star” to be more of a personal motivator. Another executive shared that among his many motivations for bringing positive DEIB changes in the company, one of his motivations was the feeling of power. He explained, “it's like the sense of empowerment—actually being able to move the needle on something that was immovable before.” There were many on the team who felt invigorated and motivated by the idea of leading the company to accomplish this

difficult, groundbreaking work. Another leader directly named his need to be admired, admitting:

I'm a performer, I want to be admired. It's a little self-serving to say the thing that I like most is when people admire us for the work. But I try to live my life so that people admire me, just part of my makeup. I am glad when people come talk to me or send me notes or whatever, that they admire the work we're doing.

Extrinsic motivators can be understood as rewards that come from the environment. When you think of an endeavor where “it’s the right thing to do” becomes the mantra and is among the first reasons that people cite for engaging in the endeavor, it might be surprising to find that in reality the motivations are more extrinsic as opposed to the intrinsic, altruistic, selfless, “giving to communities and society” ideologies that often accompany racial and social justice work. However, in the work environment these findings are not surprising. While there might be hopes of transforming hearts, minds, and personal values in an endeavor, any initiatives in the workplace that are not self-initiated are contextualized by power dynamics—the fact that participation may not be voluntary; the actions and behaviors may be required regardless of the person’s values and personal opinions; and positionality and social privilege impacts participation (i.e., motivations, who gets to opt out, who has to carry the brunt of the work and responsibility, etc.). Extrinsic and intrinsic motivations can co-exist within a person.

### ***Intrinsic Motivation***

For those participants who demonstrated intrinsic motivations, those motivators were unique to their experiences and what they considered priorities in their life. The CEO was heavily driven by his intrinsic motivators.

**Bailey.** During the pandemic, the CEO had an opportunity to get to know some Black men in his community experiencing homelessness. These experiences gave him a new perspective on racial justice and a new motivation to be a part of the burgeoning justice movements in a deeper, more impactful way. As he connected and spent time “getting to know their stories and their upbringings and their struggles,” he began to recognize, everything they experienced was not specifically because they were Black, yet there was something to some of their experiences that was impacted by their racial identity. For him, it was more about understanding how here in the U.S. that racial difference “caused their lives to be in some way more difficult than for people who are white, and that there's no way to segment out— ‘well, here's the different parts of your life that you chose that made it difficult’.” He went on to explain,

And there are different parts of their life. They didn't choose where to be born, what color their skin would be, their gender—all those things that we don't choose. It is difficult to pull apart exactly why their lives are the way they are because it's all a combination of their choices and the things that they had no choice over, and things that none of us have a choice over. They're all combined. You can't, just say, well, it's because you're black, or it's because you chose to steal something, or hit the police officer. Those choices and things he didn't have choices about are things that are all interconnected.



These intimate connections provided new and deeper understandings of racism and oppression. He began to ask himself critical questions like,

How might anyone, regardless of their race, ethnicity, or color, how might anyone respond if they're in the situation that these people are in? And is their response—knowing what they know, and coming from where they came from, and the experience that they had—is it reasonable or not? And again, some of those questions and answers aren't super clear, and everyone wouldn't agree on them, but I think it helped me think more deeply.

As he got to know about the men in deeper, more personal ways, he was compelled to think about their circumstances in ways that went beyond his own experiences, expectations, stereotypes, and assumptions. In his own words, the experience gave him “a broader and more intimate view of the struggles that people have because of racism and discrimination.” Bailey’s personal relationships motivated him to further prioritize racial justice in his company and along the way, those relationships also strengthened his resolve to continue forging forward, especially when facing obstacles and moments when the leadership team seemed to be wavering under the strain of the challenges.

**Eric.** Similarly, Eric was also highly motivated to lead DEIB change in the organization, although his motivations came from a few sources. One motivation was his strong desire to demonstrate to the employees, their families, and the community that the work of diversity and inclusion is valuable. Ultimately, he wanted to create an organization where “people looked like and reflected the communities that we serve, and people from a variety of underrepresented communities thrive.” Eric had a vision for the

Tech Star full company Zoom meetings. He wanted to “see people from different backgrounds, locations, and life experiences” and that vision kept him persistent in the work to diversify the company. Another goal and motivation he shared was his desire to receive feedback that “people felt welcomed and empowered in a way that they hadn't before in other companies.” Eric felt strongly that it was not the responsibility of people from underrepresented communities to fix the issues of discrimination and exclusion they may face, but instead the responsibility of those in the majority and more advantaged groups to lead in changing the mindsets and structures that have disadvantages different communities throughout the years. Eric's personal convictions about inclusion, racial justice, and “righting the wrongs of the past” kept him focused and unwavering as he helped direct and lead the work of the executive team.

**Other Executive Team Members.** This executive team was filled with high achievers who are not afraid of a challenge. If anything, they thrive in moments of challenge. For them another natural motivator was the fact that once it was announced to the company and publicly, they were going deeper with their DEIB work, many of them felt driven to deliver on what they promised. As one executive explained,

When you put something out there like that, then it's going to happen. I think that was a huge factor and it was contagious for the rest of us. It fueled and helped push us through some doubts about the work. From a purely leadership perspective, when something has to happen, it doesn't matter whether you doubt if you can do it anymore because the motivation to try is just so strong that nothing else really registers.

The team members valued high performance and upholding their word. These motivators drove the leaders in the work, and they took greater initiatives in leading their teams in the DEIB changes.

As the work progressed, the team members' motivations for pressing forward also progressed. Their ongoing efforts and early positive results helped the team evolve in their understanding of why the work was important and some leaders were able to connect those "whys" to their personal values. For example, as they experienced different situations, they gained new insights and motivations to go deeper in the work. As they experienced the DEIB work, it became more than just words or a plan of action. The work and its impact on individuals and the company became tangible and real. The leadership team better understood what they were trying to achieve and could better articulate how the business grew and benefited from the changes. One leader explained, "we've come to realize that we get better feedback, come up with better approaches and answers to problems, and better results when we have a more inclusive approach to decision-making." Another leader shared,

Sitting around a table or in a zoom room and looking at all of these different individuals, that's been rewarding, not just because of the look of it, but the depth and richness of the conversations that are happening. It's rewarding because we see how rich the relationships are and people's happiness of being recognized in these new ways.

These leaders became driven to continue to create environments like those she described, not just because of the better business outcomes, but they recognized that the

people seemed more engaged, authentic, and fulfilled at work. As leaders, they were personally driven to help employees succeed and be happy in their roles. The employees' well-being mattered to this group of leaders just as much as any business outcome and these results brought them satisfaction and a desire to do more.

Each of the other executives recognized their power and ability to impact social outcomes individually and as a company. To varying degrees, they were all developing stronger intrinsic motivation to advance racial and social justice. As one person stated,

In our industry there's a clear path to build personal wealth. A challenge that people from underrepresented communities face is a lack of access to build wealth. If we can create opportunities that increase people's ability to generate wealth for themselves and their communities, that's important and not just from a monetary perspective . . . it opens doors to education and world experiences people may not have due to systemic racism.

Another stated motivator was "being able to help lead change within the organization that had a real impact in the lives of employees and their families." They were thinking beyond what the company needed and tapping into motivation connected to their personal values and goals.

The team also became motivated to learn and go deeper into understanding diversity and inclusion. One person shared, "I've learned a lot, and it has sparked my interest in going deeper into things that were maybe just surface level." Like others, another spoke of how the initial motivation was to "tow the company line," but with time she noticed a change within herself and the leadership team as they developed more

personal “whys” for helping to lead the work. She said, “I’ve seen us morph . . . our policies, our approaches, and our questions have gotten so sophisticated that it seems like we all have our own why now.” She went on to add, “Now my why is richer and deeper. I’m motivated to learn more and do better. I want to be able to have these kinds of deep conversations with my kids and family.”

### ***Summary***

As a team, there may not have been a deep inherent interest or connection to leading DEIB work initially, but over time, these dedicated leaders were able to find motivational drivers beyond the external rewards. As they experienced the beneficial and positive impacts of becoming a more diverse and inclusive company and recognized the power of their leadership in driving that impact, they developed a deeper consciousness of the work and through the ongoing practice of introspectively analyzing and assessing how their inherent biases, preconceptions, values, and cultural perspectives and diversity and power, they were able to connect aspects of the work to their more deeply rooted personal values. From the time they started working with the DEIB consultant to the times of the study interviews, these leaders surprised even themselves by how personal the journey of leading the DEIB had become and their newfound intrinsic motivators for the work.

### **Challenges**

This section focuses on challenges identified across participants, detailing them at the personal and professional levels, including how the two distinct categories often blended, becoming enmeshed much to the surprise of the leaders. The findings also

illuminate how as the executive team leaders felt their sense of self and identity challenged in new ways, they engaged in reflexive and meaning making practices. Most of the leaders were able to describe their experiences and how they sorted it out and made sense of what they experienced. The most common obstacles and challenges are explained through the themes of time constraints, leadership disequilibrium, working through tensions as a team, guiding metrics, and personal challenges.

### *Time Constraints*

The leaders in this study identified team discussion and collaboration, planning, communication channels, and implementation as critical aspects of leading the DEIB change. The discussions were aimed at building shared understandings of the issues and determining the company stance on various issues; they collaborated to identify potential impact and unintended consequences across the company, plan, and build consensus among the team when possible; and they then made final decisions on communication and implementation strategies. In their interviews, each of the leaders named time as one of their biggest challenges for each of these phases in the work.

**Leadership Team Discussions & Planning.** In interviews it was common for the leaders to express frustration, and sometimes extreme frustration, over the amount of time that was spent in discussion. A primary concern was rooted in concern for business results. They felt in some circumstances, the time and effort it took to work through the different issues was overwhelming and distracted them from the work of the business, especially early on when some of the team members thought of the work as an “add on” as opposed to a deeper cultural transformation that would be integrated into the business

mission and values, thereby also making it “work of the business.” Despite the frustration with the amount of time it took to discuss and attempt to build consensus around issues, the leaders also recognized how spending this time to collaborate and build the new norms was necessary for their success. They described these deliberations as “feeling all-consuming at times,” and yet they all acknowledged that through these discussions they experienced a new approach to decision making— through building a collective understanding of the various issues, factors, and perspectives, they were able to achieve decision making that was better informed and more inclusive than their previous processes. One executive gave the example of enduring many meetings that lasted for hours beyond its scheduled end time as the team grappled over challenging DEIB topics and decisions. Shaking his head at the memories he shared, “Meetings went late into the evening. I would come out of my office fired up about some of those conversations.” Speaking of the meetings as though he were reliving the moments, his exacerbation was palpable as he rolled his eyes adding, “My initial gut reaction was usually, ‘Oh my gosh, this is crazy. Why did we do this?’”

By the teams’ account, over time they learned to embrace slowing down in ways that their more traditional decision-making processes had not allowed for, and they began to recognize that the extended time of group processing was necessary and beneficial to the change they were attempting to create in the company. Nevertheless, as they attempted to balance the DEIB work and all the other business needs, time remained a challenge. The same leader summed up the experience adding how it helped him approach situations differently and transformed his practices, “I make more time and

space for others to express thoughts and feedback because of the leadership team's experience and the results that we've seen."

**Decision Making.** Decision making became far more complex than any of them originally expected it to be. Further compounding the challenges of time, some of their typical decision-making processes were also barriers in the work. A particular barrier stemmed from the leadership team's inherent reliance on "majority rule" ideology and practices. At Tech Star "majority rule" was a common approach used after surveying the needs of employees and business and then designing interventions and policies to address those needs. In many ways the DEIB work required the leaders to shift from that common approach and focus on seeking out, understanding, and responding to the experience and needs of not just the perceived majority, but also the minority groups within the company and external stakeholders. As the team began to do the deeper DEIB work and consider the necessary cultural shifts, they were forced to grapple with their traditional "majority rule" approach to leadership. Reflecting their heightened self-awareness, the leaders shared comments such as, "we most often reflect the interests of the majority;" "we base decisions and do our work by appealing to the bulk, kind of the 'bell curve' approach;" and "major decision-making is typically driven by the majority, not the outliers."

The company's DEIB-driven transformation had to begin with the executive teams' ways of thinking, operating, and making decisions. This was accomplished by first building self-awareness, which usually developed through lengthy team discussions where they needed to respond to a problem or when an issue was called out as needing to be addressed before it presented as a problem. Suddenly, there was a responsibility to



understand and consider the experiences and perspectives of minority groups, which required taking additional time and space for the discussions and collaborative planning. They needed time, new approaches, and a new patience for navigating it all. According to the CEO, part of the challenge was they had to listen to each other and respond in different ways and that required a new level of patience. He explained,

It takes patience to listen intently and actively versus listening and at the same time formulating a response or a rebuttal. . . it takes listening to people and their concerns because you're trying to figure out, “what am I missing? Where is my experience not the same or not resonating with that person?”

It was that process of deep active listening that made meeting discussions livelier and required more time and effort. Focusing on inclusion, the team could no longer take the shorter route of primarily relying on the perspective and needs of the majority.

**Implementation: Communication, Recruitment, and Hiring.** As the leadership team moved forward, they inevitably hit the next challenge— how could they create communication channels for informing the teams within the company and get their feedback in a timely manner? One leader explained the issue and asked, “We spent hours in debate and dialogue to build alignment and reach a decision. How do you transfer the level of passion and understanding to others, especially when they were not a part of the hundreds of hours of conversations?” Even though the leadership team recognized the importance of having the time to listen, discuss and process new ideas and differing perspectives, employees had few opportunities to work through the proposed changes. There simply was not enough time for those in-depth conversations at every level of the

company. That remained an ongoing tension and strain for the executive team as they managed this change process.

Recruitment and hiring were another area where time was identified as a challenge. A goal and primary focus of the DEIB work at Tech Star was increased recruitment and hiring of highly qualified, underrepresented candidates. In their efforts, new requirements and candidate filters were added to the recruitment and selection process to increase diverse representation in the hiring pools. The addition of new criteria slowed down the hiring process significantly and the perceived delays were seen as detrimental to the business needs. The leaders faced the pressure of the immediate business needs not being met, frustrated teams and managers, and the ongoing responsibility to make the right decisions for the company to succeed. These demands were not just frustrating, but they took other emotional tolls on some of the leaders. In a candid moment, one executive talked about how the delays and pressures took him to the brink and for the first time ever, began to wonder if he was in the right company. He shared,

I love the business, love the product, and I'm passionate about what we do, but I felt like we couldn't get to the next step or milestone unless we hired people faster. Frankly, I hadn't bought into the fact that slowing down and doing the hard work to find a diverse pool of candidates (when we already had many valid candidates) was what we needed to do. There were many nights where I questioned the leadership and questioned the policies and things that we put in place and a few nights where I wondered, "is this the right place for me?"

This leader was not alone in second guessing the new policies and decisions. Nearly all the executives questioned the sacrifice the company made by slowing down the hiring process at one point or another.

Despite mounting concerns, the CEO never lost sight of the purpose for the new recruiting and hiring practices. He held firm to the teams' new rules, and this proved to be a unique challenge that only the CEO faced. He was the only one with the authority and influence to make modifications or cancel the rules. Bailey admitted that eventually business pressures and individuals' frustrations were high enough that he began to contemplate when to modify the recruitment and hiring plans versus when to stay firm. Initially he decided to maintain the new rules even though the sacrifice was a timely hiring process, and at times, losing their top candidates due to the lengthy process. It was not until the leadership team hit new benchmarks (i.e., they built a stronger understanding and focus on what they were trying to achieve, fully implemented the new rules, and experienced success on multiple levels) that Bailey considered amending their new procedures. Once the leadership team solidified their understanding of diversity which included understanding the significance of "historically underrepresented" categories vs. underrepresentation in a specific setting such as company or a specific team within the company, the CEO felt it was an appropriate time to make adjustments. The team expanded the recruitment and hiring criteria to be more inclusive and responsive to different categories of underrepresentation on teams and in the company. The adjustments did not cancel or undermine their initial strategy, they instead strengthened their position

and goals around diversity in the workplace. They also provided some relief from the pressure of struggling to fill open positions in a timely manner. The CEO explained,

I allowed a shift, and it was a significant shift. We changed our rule to expand the definition of underrepresented from the traditional definition to a mathematical definition of underrepresented that is based on the company and team make-up. That wasn't giving up, we changed the filters in a way that allowed us to continue to attract [and prioritize] diverse talent. I'm glad that we were able to redefine what underrepresented meant in a way that included everyone.

By the time the CEO implemented the shift, the leadership team had already experienced successes and the new changes added to their momentum. There was a greater focus on diversity of thought and lived experiences for all candidates in their recruitment process, and the number of highly qualified candidates from historically underrepresented groups increased, as did the number of offers to those candidates. The executive team's confidence in leading the work grew (individually and collectively) and they finally arrived at a place of shared understanding of how the key DEIB terms were to be used in different settings. Most importantly, after months of implementing their new policies and participating in group and individual self-reflexive practices with the consultant, they were able to clearly define what the DEIB terms meant at Tech Star and how those terms would be operationalized in their company. That was a major turning point for the leadership team as they moved forward in the work. When it comes to the amount of time required to implement and sustain the DEIB plans, it would be misleading to characterize the team's experiences solely as challenging and filled with barriers because ultimately,

the experiences were essential for cultivating critical reflection, sustained action, and transformation.

### *Vulnerability in Leadership*

In terms of their leadership culture, these high performing executives were accustomed to pushing innovation and taking on new challenges. As a team, they have strategies and procedures for working through difficult or unexpected obstacles. The challenges of the DEIB work were a different experience for them. One leader explained:

We're all accustomed to challenges. It's like, oh, we've got this! Let's go read the book on this, or let's go talk to this or that leader for insights. But with the DEIB work, there is no book or experienced executive teams to ask. It's new terrain and a new leadership experience for all of us.

Although the team worked with a DEIB consultant, it was not the same as using the resources they found familiar and comfortable. So many of the DEIB concepts and processes were new to the team and initially, they did not trust the consultant like they trusted their usual resources and methods. As a result, most of them felt less confident moving into the work and they sometimes questioned the work and the choices they made as a team. For example, one leader described themselves as being invested in the work, but unsure that the team was doing the right thing. She said, "It felt like we were pushing the needles so far. Sometimes I wondered if it was too far and if it was going into some legal issues." Even though the team was cautious and intentionally mindful when it came to possible legal implications and unintended consequences of their decisions, at times team members remained uncertain and wary of potential backlash. They admitted facing

uncertainty in other leadership efforts, but this time it was different. The feelings of vulnerability and uncertainty were more frequent and intense than they were used to experiencing. Later, in their own ways, each leader recognized that their moments of hesitancy and doubt were because they were not confident in their understanding of the purpose and expectations of the equity work. The clearer those things became, the more confident the leaders felt.

In reflection, one of the leaders talked about the disequilibrium he experienced in meetings where DEIB issues were discussed. He described it as recognizing himself as “the person in the room who was a part of the group that had contributed to some of the inequities and social disadvantages that the company was working hard to understand and correct.” In those moments he did not have space to process and deeply reflect on what he was hearing. Feelings surfaced as a result, on whether his perceptions of what was being conveyed were accurate. Instead, he had to continue “portraying leadership by stepping up” and continuing to contribute. Adding to the complexity of those situations, in representing DEIB leadership he was expected to contribute in ways that were different from the “usual ways of leading.” He instead was expected to be more transparent in sharing his experience and what he was learning. At times in smaller more intimate meetings he was expected to be more vulnerable by sharing his own internal processing of the learning and leading connected to the work and progress the company was trying to achieve. The expectations he faced were not isolated to only him, the entire leadership team faced them. Processing on both professional and personal levels in real time and being vulnerable in new ways was a tall order for executives, especially those who were

typically more private and not prone to center their emotions or personal reflections when leading at work.

With the support and reassurance of the consultant and their colleagues, the leaders continued to move forward despite their discomfort. Eventually they were able to embrace discomfort as part of the process. After having time to reflect, they shared comments like, “There's still a fear but it's not nearly as prevalent as it was early in our DEI journey;” “It was comforting to know that I was going through this with people that are relatable and that I identified with. There were others that were in a similar boat as me.”

**Lack of Diverse Representation on the Executive Team.** The leadership team demonstrated commitment to creating more diversity, but the predominantly white male team lacked the diversity they worked to create. Even the CEO admitted,

To improve the likelihood of success the team needs to be diverse. People normally only believe what they see . . . and they like to see people that look and act like them leading the way. That gives them confidence consciously or unconsciously that they too can do that.

After months and months of efforts, the leadership team continued to struggle to find the right candidates from traditionally underrepresented communities to add to the executive team. The absence of more gender and racial diversity impacted how the team was perceived and for some of the team members it contributed to their uncertainty in the work. For example, one leader felt like her experiences were different and, in some ways, more “privileged” than others and she questioned her ability to “represent other people

appropriately or understand their struggles.” In this way she and other leaders had to work through “imposter syndrome” as they led the DEIB work.

**Others’ Perceptions.** A major personal challenge was insecurity about how they would be perceived by their team and other company employees. Unlike typical leadership moments where the leaders’ professional knowledge, experience and professional personas allowed them to feel assured and grounded, the DEIB work forced them to experience day-to-day work in more personal and intimate ways. Many of the white executives reported concern about how they would be perceived based on their attributes such as race, gender, age, and role in the company. “Cancel culture” and increased scrutiny of white male leaders were cited as examples of the common attacks that left them feeling more vulnerable than usual. A few of the leaders were candid about their experiences with doubt and the discomfort that sometimes accompanied leading the work. For one executive, despite all his years of leadership experience, he was surprised by the onset of unfamiliar insecurities, feelings of fear, and discomfort. As a white male leader, he felt like he was under a microscope being judged in personal ways and it made him uncomfortable. He explained, “being in a room with underrepresented people that could have viewed me differently than how I viewed myself was an odd position to be in.” Navigating the perceptions of others, not being sure what they were thinking of him created fears that he further explained:

I might say something that comes across not the way I intended, or I might use a term that is no longer socially acceptable. Things are changing so often that



there's still that fear that I say something that has unintended consequences and not even be aware of those consequences.

This leader who was typically confident in leading was suddenly unsure about what to do or say for fear of offending someone and potentially not understanding that he had even done so. He was not alone in fearing that he might say the wrong thing, be negatively judged, and lose credibility with his employees. Not surprisingly, he was not alone in second guessing his words and impact on their teams. Five of the eight executives expressed similar fears and at times, they also dealt with the paranoia created by being in the spotlight and “feeling judged” or “on eggshells” because they might say or do what someone else thought was wrong or offensive. The leaders gave specific examples of their experiences that fed those fears.

From the onset of the initial work, the executives experienced skepticism and moments of strong criticism from employees. For one leader, the pushback was akin to the adage, “damned if you do, damned if you don’t.” Despite her earnest efforts to create different opportunities within the company she described her experience as “. . . people treated me like what I was trying to do was wrong and they thought I was the enemy.” Another leader gave the example of how some of the strongest advocates of more diverse representation in the company also provided the most critical feedback about how the company reported demographics and results of their efforts. Over time the leaders slowly figured out ways to allow transparency and vulnerability to be a part of group and individual leadership. Once they conquered that challenge, they were able to approach the DEIB work in ways that were more authentic and realistic for who they each were,

regardless of the insecurities that may have lingered or the consequences of others' negative perceptions.

There were many times when the team's efforts and credibility in the work were questioned.

**Company-wide.** The team quickly realized that across the company, most of the employees publicly said they supported the direction of the new efforts, yet many of them found ways to express different perspectives and expectations of what was appropriate for the workplace. These were challenging realizations for the leadership team, especially when people, including managers, did things to undermine the work. The CEO found these situations most challenging, explaining, "People can easily say, 'I'm aligned, I agree,' but when it comes down to their needs, their business results and metrics—where they're going to have to sacrifice, you start to realize who really is committed and agrees." He went on to describe how some people's positionality did not lead to prioritization of the business goals for diversity and inclusion. He said their positionality, or their "upbringing, experiences, and perhaps strongly held beliefs about race, inclusivity, opportunity, and the business aspects that one should be considering in growing a business and having a diverse team" ultimately determined how they experienced and participated in the DEIB work. As such, he grappled with how even though people said they wanted "success for the business," their response to the company changes demonstrated just how varying the perspectives of success were (i.e., financial vs diversity and inclusion).

**Executive Team.** As the leadership team rolled out the DEIB initiatives, they were met with a general sense of enthusiasm and support, it was after all, “the right thing to do.” As the work unfolded, even though the executive team provided a united front, “everyone did not always agree on everything” according to the executives. As one leader recounted,

We should have all been on the same page. I remember thinking, “wow, I didn't know it was going to be this hard.” I would think, “Oh, let's all rally! We've got the same lens!” But that was silly because we didn't. We're all very different.

In these moments, the team's anchor was the shared goals and motivations for being successful in the work. Nevertheless, the leaders' differing lenses and perspectives presented challenges along the way, which resulted in lengthy, sometimes heated discussions as the team attempted to calibrate and recalibrate across their differences.

A noteworthy example of this came from one of the leaders who faced a challenge unique to his experience. Given this executive's strong belief in performance as the key indicator of success, he was not in full agreement with the principles of the new hiring process. The new criteria for identifying and evaluating various applicant characteristics, experiences, and assets were not his preference. Like his colleagues he adopted and showed support for the process, but his perception and experience of the process did not align with the rest of the leadership team. He explained, “the process has made me look at people for more than their skill. Now I look at them for race, ethnicity, or sex for example.” Arguably, the processes for diversifying the company were designed to identify multiple aspects of identity and lived experiences. It also created new

opportunities for all candidates to showcase their various qualities, skills, and experience. This executive did not perceive or experience the changes as beneficial, certainly not in the same ways as his colleagues.

Another example of differences on the team, the same leader also questioned the new hiring standards. He believed they had issues with the hiring process especially given the “urgency and haste” created by the delays from the new process. For his team, turnover was higher than preferred, and he felt it was because standards were not met in the hiring process. For him, his concerns that the new policies lowered the traditional standards in hiring were unresolved. Interestingly, he was the only leader who expressed perceptions or concerns about the hiring standards being compromised. The other leaders spoke with confidence about the efficacy of the new hiring policies and practices and two leaders specifically discussed how the new levels of scrutiny and review of candidates had led to even higher standards and a higher caliber of finalists for open positions.

These examples provide a glimpse of how the executive team experienced diversity of thought and perspective in their own deliberations. At times their opposing perspectives created tensions and frustrations within the team. In these moments the Tech Star executives worked to at least hear and understand each other, and then make the best decisions possible. The leaders could authentically represent and maintain their personal values and perspectives, even when at odds with other team members. When there was imperfect alignment in “how” the work was done, as long as there was total alignment in the “what” (i.e., what they were trying to achieve/desired outcomes), there was enough common ground and alignment in ways that mattered the most for achieving the

anticipated outcomes and sustaining the company mission. This team showed how their shared values around the business mission and goals, and at least some degree of agreement around the DEIB approach led to more inclusive and authentic leadership and continued opportunities for success.

While the executive team had overarching alignment and strong momentum, adding to the previously stated examples, there were many other moments when the team lacked alignment in their individual perspectives and priorities. For everyone, that felt even more challenging. One leader expressed how in moments when it was clear that her views and the things, she cared about most were not necessarily shared amongst her colleagues, she felt a deep disappointment at what she perceived as people simply not caring or “not caring as much as they should” about particular topics. She shared, “once you feel that [disappointment], it's hard to go back or believe that we all care the same way or the same amount. That's hard to face.” The cognitive and emotional dissonance that came from learning that the colleagues who she assumed “thought like she did” and prioritized aspects of the DEIB work in the same way, was hard to process— all while authentically sustaining team coherence and publicly presenting a united front. This was not a unique finding. Many of the leaders expressed challenges with having to accept differences in perspectives and values amongst the executive team. Those situations were described as depleting and “made the work feel unbearable on some days.”

As the leaders had opportunities to self-reflect and process with each other and the consultant, their understanding of the circumstances and everyone’s reactions grew. This cognitive process of reflecting about psychological and emotional responses, while

also considering the contexts and people involved in the situation led them to engage in deeper thinking and learning, they also experienced deeper self-awareness and CC in those moments. For example, the CEO was able to depersonalize and unpack those moments explaining:

Like any other business issue, everyday there are new and different things that we get to solve. The difference [with the DEIB work] is that some significant emotional undertones and overtones are involved. That adds a bit of complexity to the thinking and process.

Another leader explained the moments as, “incongruence with others’ perspectives because it's not their lived experience. They just don't understand it and end up diminishing it and it can be frustrating for both sides.” The introduction of strong emotions definitely changed the nature of the meetings at times, but the leaders’ opportunities to reflect and process took their responses past pure emotion to more rational and productive thinking. Arguably, that ability to shift out of personal emotionality to more grounded and focused thinking allowed these executives to continue moving forward in “leadership mode” as opposed to emotional meltdowns that would likely disrupt team cohesion, momentum, and opportunities for success. Even if they despised another leader’s perspective or simply agreed to disagree, by remaining focused on shared understandings and shared goals, the team was able to navigate tough moments and push forward as an intact team.

One leader summed it up exclaiming, “I didn't think it was going to be so polarizing . . . seeing how some people just don't care, and other people think we need to

do more.” For all the leaders, when dealing with the executive team members or employees at large, all the differing perspectives and expectations left the team experiencing strong emotions. Many of the executives found the work to be physically and emotionally exhausting. Every leader referred to hours and hours of meetings and the emotional toll those meetings took on them. One executive said,

We spent so much time . . . people are just burnt out and it's not their fault. There are so many times after DEI leadership meetings where I'm either in tears or I'm pissed, and I can't even talk to my family until I take an hour to decompress.

Another leader described a different kind of fatigue that came with the work:

Our CEO wants everything documented and wants us to follow specific rules and decision trees. Every week there's a new case that isn't exactly captured in our current rules so then we have to rehash the rules and decision tree to include this particular situation. Then we have to document the change and why we made the change. And then next week's case is going to be another new situation. And we'll do it all over again. Every week. That part's exhausting and the repetitive process makes everyone second guess the work.

In the moment the work felt tedious and “over the top” or beyond what was actually needed, but later, there was a greater appreciation and recognition that some of those hours and lengthy discussions were beneficial. In real time the processes felt circular and gratuitously repetitive but over time they served an important purpose and helped the team create consistency in approach and moved them forward in their goals.

### ***Metrics***

Another area of challenge for the team was developing metrics and ways of tracking progress and success. Even though it was experienced as a challenge, the team understood the need for and importance of metrics in these change projects. For example, the CEO repeatedly stressed the need to attach organizational diversity and cultural shifts to business goals and results, and that tracking and achieving those goals required clear metrics. With strong conviction he shared, “I’m just of the mindset that *what gets measured gets done*. If you don’t have measurements that are transparent and available to align people on, they don’t know whether they’re making progress or not.” The other leaders provided examples of why metrics were needed. One executive shared, “it would be nice to know when you’re making progress, because with this work you may not realize when you’re making progress. That is incredibly hard.” Other executives talked about how with the work being so new and different for the team, they didn’t always know what all was considered progress and what should be measured or counted as “small wins.” Even with all the strong support and acknowledgements of the metric needs, the leadership team struggled to identify the most appropriate metrics and benchmarks.

According to the leaders, their biggest hurdle was identifying metrics to define and track the various types of diversity represented in the company. The challenge was making sure people, and their experiences were accounted for without making them feel like a number or tokenized to fulfill a quota. One executive described the puzzle the team faced:



We wanted to set meaningful, measurable goals and track them, but those efforts were often experienced as dehumanizing. How do you measure and track processes without making individuals or certain groups feel minimized to a number or quota, and how do you talk about demographics and make sure people represented in smaller numbers are not identified in the data?

The team also struggled with finding ways to answer accusations that by publicly calling out people's attributes and lived experiences they were also essentializing people and narrowing them down to just one or two attributes and not celebrating the fullness of who they were. The same executive also added how the leadership team constantly sought ways to "do metrics in a way that protected people," but even for these skilled leaders, the experience of developing metrics and tracking proved to be far more complex than they had anticipated. Not having "the answer" to solve this problem was an unfamiliar and uncomfortable experience for the team and each leader was able to describe the challenge in terms of their own positions and experiences.

In discussing how the lack of metrics and ways of measuring the work and success weighed heavily on the leadership team, another team member bemoaned,

This all is so new for us and in the industry. At times, we don't have clear or consistent understanding so we may not be able to describe the exact outcomes we want to achieve, let alone cohesive plans and progress markers that could be used uniformly throughout the company.

What they were attempting to do was new and needed to be created from scratch. Even when they were able to "borrow" methods and metrics used by other companies and

organizations, they still needed to be modified so that they were relevant and appropriate for the existing company culture and goals. The final metric issue amongst the team was that some of the changes they were working towards weren't always tangible as the CFO explained:

I can tell people you need to increase booking numbers by 30%. It's so easy to direct people and say, "You're over budget. Your team needs to reduce headcount and cut travel." That's easy because I know what the answer is because they're numbers. Even when there is ambiguity, I can sit with that, but sitting with ambiguity around concrete, tangible outcomes is very different from sitting in DEI related ambiguity.

Her point is understandable. Expecting a team to "increase sales by at least 25%" is easier to conceptualize, benchmark, and set goals for, compared to telling a team to "increase team inclusivity by 25%." Inclusive according to who, and what are the benchmarks for 25%? Those are the types of questions the executive team faced on a regular basis.

However, through a combination of reassurance and guidance from their DEIB consultant, "sheer willpower" and a deep belief that what they were trying to achieve was best for the company and its people, they remained committed despite limitations in measurement.

At the time of the study, the team was still working to define their DEIB metrics and determining which measurements were most meaningful in the various business contexts. While there is more literature available about recruitment and hiring, resources for developing DEIB metrics aligned and interconnected with the other company metrics

and goals are lacking. The CEO's experience reflected this resource challenge. He said, "Most of the books that I've read, and seem to be in the popular circulation don't have many 'how-tos.' There doesn't seem to be a lot of workable tests or solutions that people could try." Forging a path of innovative leadership often means imagining, creating, and modifying what does not yet exist. With so many opinions, emotions, goals at stake, it remains a challenge that the leadership team works on day by day.

The executive leaders faced a myriad of obstacles rooted in personal and professional challenges. The findings highlight that throughout the initiative, the personal and professional experiences often overlapped and intertwined in unexpected ways, bringing about a sense of embroilment for the leaders. The challenges further illuminate how the leaders, grappling with their own evolving identities amidst the change process, turned experiences into meaningful insights. The theme of time constraints emerged prominently. Leaders' frustrations regarding the extensive hours spent in deliberations initially felt tangential to business operations but were later recognized as integral to the cultural transformation of the organization. This shift was often a result of intensive, reflective meetings.

The leaders were also challenged by the need to rethink traditional decision-making models, particularly the 'majority rule' approach that had been a staple in their organization. This was another more prominent finding as DEIB initiatives pushed them to consider the needs and experiences of minority voices, prompting broader, more complex discussions and, at times, reshaping their leadership methodologies. The complexities of these decisions underscored the necessity of patient, attentive leadership

and the adoption of new strategies to truly embrace inclusion. Overall, the data for challenges portray a candid landscape of the hurdles encountered by executive leaders in the DEIB change process. The data also reveals the depth of their commitment to overcoming professional and personal obstacles, highlighting their journey through periods of uncertainty.

### **Lessons Learned**

Each of the leaders in the study reported learning and gaining more than they anticipated when they began the deeper DEIB work. When the team decided to lead deeper DEIB work and hire a consultant to help them, six of the eight leaders expressed that the work was quite different from how they anticipated it would be. One leader explained, “I thought it would be more one way education versus how it played out in practice whereby we were far more involved and were expected to speak up, listen, and actually participate.” This leader was not alone in thinking the experience would be a “one way” transaction where they were able to be passive learners. Most of the leaders expressed similar expectations and they faced a quick reality check once the work began. Instead of being passive learners “rubber stamping” decisions, the executive team found themselves expected to “lead” as active participants, speaking and participating in ways that were more personal and intimate, and leading others in DEIB conversations. The same leader added:

I think my expectation was the consultant’s coming and she’s going to educate us on diversity, equity, and inclusion, and talk about why it’s important, and so on and so forth rather than how it actually played out, which was far more involved,

a far higher level of understanding, higher level of care and more emotionally triggering than I initially expected.

Another leader spoke of how she thought her role would be to “sign off on things” explaining, “I just thought they would come up with this and the leadership team is going to bless it.” Another leader expected their participation would be more technical in nature— “My role in the change efforts was going to be more logistics, like scheduling the meetings and training and making sure we were reporting out and tracking metrics. I didn't anticipate the personal, emotional lift of the work.” The team experienced a myriad of different expectations, and all were shocked by what the work actually entailed and how they learned in the process.

### ***Expectations vs. Reality***

Beginning at the first meeting with the consultant, the team experienced how even in a professional setting, their personal growth was interconnected with their professional growth in DEIB work. As leaders, their abilities to effectively lead the company and their teams through the big DEIB changes and shifts they had planned were also impacted by their personal engagement and growth. This newfound awareness was profound for some of the leaders. Some of their reflective comments include:

- “Ultimately it is about you, about changing in the way you want to change, and you end up becoming more authentic and doing the work on your terms.”
- “You start out trying to change the world and you end up changing yourself. That is something that is unexpected and also an amazing part of the whole journey.”

- “Little did I know that it would be a more individual journey than a team journey.”
- “I’ve done a lot of DEI training in the past so I thought this would be an opportunity for the others to learn, but it ended up being about what I needed to learn and my growth.”

One leader shared a humorous analogy about how they thought it would be introspective work where everyone else would be “fixed” and think about DEIB more like they did. He said:

You go to a DEI training; you participate in the training. Not like I wouldn't do something with what I learned, but I thought it was going to be a very introspective thing. I thought it was going to be like counseling. Sometimes you go to couple’s counseling, and you go because you hope the other person changes. If I were to be really honest, that's what I thought it was going to be.

There were different ideas of the work before them and some secretly hoped this interest in leading the DEIB work would be quick lightweight work, others hoped their colleagues would “see the light” and be changed, and others hoped for organizational change that rippled out into their industry. Different hopes and motivations for the work led to different observations and learning along the way.

### ***Building self-confidence to lead***

This team of ambitious leaders were accustomed to deciding on a course of action and sticking to it through completion. At some point during this work, however, nearly all of the leaders experienced a lapse in confidence in completing the work. Individually and

as a group, there were times when the team wavered and questioned some of their decisions. when the new changes interfered and slowed down the traditional business practices. The purpose of an organizational change is to interfere and disrupt traditional business practices so that was to be expected, but what was different about this DEIB work was the leaders' lack of familiarity with the process. Also, at times they did not fully understand exactly what they were attempting to accomplish. These factors made it more difficult for them to remain confident in their decisions, unlike their leadership decisions with other business issues. The leaders discussed these experiences and what they learned from going through those moments with the team. Their greatest learning in the project came from their reckonings with what they did not know about DEIB and what was new in their leadership experience. At the simplest level one executive shared, "The work starts with deepening your understanding around all aspects of diversity, equity, inclusion, and belonging. It's just not an acronym. You have to understand all of the parts, especially the 'belonging' part." Another leader explained, "It ends up being a much more nuanced topic than at first glance. Every part of it that develops then reveals more detailed parts under it. That is to be expected, but still feels unexpected sometimes."

An executive described the frustrations saying, "I'm not an expert, but I think I know some stuff. And then I have a moment where I say something that isn't appropriate or is interpreted in ways I didn't mean it." After sharing a specific example she said, "I felt like such an idiot! I should know better than that!" This leader was not alone in having a moment of second-guessing or realizing they said the wrong thing. All of the

leaders spoke about fears of inadvertently doing or “saying the wrong thing.” For each of them, the personal learning came into play as they figured out how to manage those fears and not allow them to interrupt how they lead the work. The same leader went on to talk about how after a period of reflection she realized,

You don't know a lot about any topic when you're first starting out. If you're starting a running program or eating healthy, you have to learn about it, try it and make mistakes along the way. Sometimes you find what works for the other person doesn't work for you. That's all a part of the process. You have to approach the DEI work the same way. I felt so much shame and I had to learn to let that go. Don't shame others and don't shame yourself.

The leaders had to learn to navigate new work and learn to navigate and manage their emotions and natural reactions to what they were experiencing.

The leaders continued learning DEIB content, and they also learned how to better navigate leading the work. One immediate effort defining and communicating the “why” behind the work and ensuring that the “why” be connected and intertwined with the business mission and goals. The CEO stressed that leaders have to understand “the business result that you want, why you want that business result, and what will be the outcome of that result when you're successful.” He learned firsthand that committing the company to make DEIB shifts was a business decision, so he needed to frame it as a business decision to increase the buy-in and likelihood of success.



Next, the leaders learned that a successful DEIB change effort required clear and consistent definitions of the conditions and issues of the efforts. For example, one leader described the shared meaning of “DEIB”:

It's not just about diversity in race, ethnicity, or gender—it's about diversity in thinking. That's the reason to hire diverse candidates, diverse as in different than the majority of the people on the team because those people will have an experience and mind map that's different. The team's combined experience and mind map will give a broader view of things compared to if everyone on the team is similar in perspectives and lived experience.

The same leader was eventually able to understand and explain what they were trying to accomplish by diversifying the staff. She described her experience:

I could have called a hundred qualified people to start working at the company, but I couldn't because they would all be white. With multiple openings on my team that was frustrating. I had this big hiring goal, but I couldn't rely solely on my usual networks. At first it just seemed like we couldn't hire white people and that felt wrong. But learning more about diversity and diversity of thought, I began to understand the problem wasn't “white people” it was “sameness.” We were the same race, had very similar backgrounds and lived experiences—we represented many of the same things.

The executive learned that the quest for diversity in the workplace was not just about race and racism, but rather, representation of a variety of perspectives. Diversity in perspective as in people with different backgrounds, world views, lived experiences, socio-economic

status, educational backgrounds, and ways of knowing. They learned that embracing diversity in perspectives and experiences was essential for cultivating a more inclusive and innovative organizational culture.

With a new focus on more inclusive decision-making, the team quickly learned that the “best” decision was one that led to a good outcome that everyone on the leadership team could at least “live with and support.” Sometimes getting to something that they could all stand behind took a great deal of time. One leader admitted, “Leading this type of change required much more patience than I normally would expend,” and the other leaders also admitted to having their patience challenged in the process. Initially, the added layers of conversation and debating seemed unnecessary and tedious. Worst, in some moments, the long process left the team feeling no closer to achieving their goals. As one executive explained it, “If we can't all agree and come to a decision on something as simple as the wording of one sentence, how are we going to make more grandiose level decisions?” The same executive then acknowledged that over time they were able to observe the results of their efforts. They reflected on their new practice, realizing that even though an argument over word choice in a sentence may have felt like minutia at the time, it was an important part of the process and ultimately helped them to be more aligned and prepared to make the “macro decisions.”

Another leader noted his new learning in the process. He said, “If we can't bring people along and help them consider, adjust, or broaden their view, it just makes them more callous and anxious about not being able to deliver the results that they're expected to deliver.” The team learned that taking the time to talk through issues and gain a deeper

understanding of others' perspectives, particularly those that were different from their own, were necessary for everyone to gain a greater appreciation and experiential knowing of inclusive decision making. The team learned that helping others to understand and navigate the changes required patience. In this context, patience looked like slowing down to ask questions like, "What does this person need? Where are they coming from? What are they thinking about? Why are they resisting this? What is it that they know that I/we don't know?"

As the leaders leaned into gaining a better understanding of others, they were also unknowingly leaning into practices of CC. As they began asking deeper critical questions, those questions and answers also led them to examine and reflect upon their own thinking and assumptions. As another leader shared,

My growth came from learning how to not get mad. I just assumed people were not aligned with the work and I had to figure out how to do this work in a way where I wasn't just mad at them and thinking that they were just giving up too easily.

This leader didn't just "exercise self-control and suppress his anger" or meditate or do something to distract or interrupt his feelings of anger. He engaged in a more reflective practice that led him back to examining himself and his assumptions. Instead of insisting that others change, through greater self-awareness he recognized the potential of changing himself by reshaping his perspective. Another leader shared an example of their own realizations admitting,

I was too idealistic about “changing hearts and minds.” I had to change *my* heart and mind and accept that people are just in different places. I had to be more practical and focus on changing behaviors and outcomes, not values and opinions.

Whereas before the leaders focused decisions on business knowledge and function and were “methodical and not easily swayed by feelings and emotions,” bringing increased consciousness into the work taught them new ways of experiencing, evaluating, and responding to workplace situations, people, and emotions.

One last lesson learned was shared by the CEO. He and the other executives were already aware of how important communication is in a change project, but they learned there are different nuances to the DEIB work that require more communications and strategically planned communication. The CEO said,

People have to be invited initially, but also warned. Warned feels like the wrong word. It's more about preparing people and letting them know, 1) this work is going to be hard; 2) people need to be prepared for the unknown and moving forward into the unknown; and 3) you need to be open to rethinking the way you do things, even when it feels like the extra, unnecessary, and harder thing to do.

The CEO emphasized the critical role of communication in DEIB initiatives, recognizing the need for thoughtful planning and transparency to help others in the company navigate the complexities of the work. He recognized that by preparing people for the coming challenges, leaders can foster a culture of openness, resilience, and adaptability, all essential capacity builders for meaningful change.

**Advice**

In this study, the themes of new learnings and advice seemed to blend as the advice was directly connected to the leaders' experiences and what they learned along the way. Their recommendations come from deeper reflections of what they observed, experienced, and learned as a result of their own work. This section connects and grounds their advice in their own experiences and lessons learned.

***CEO Advice***

Each of the executives had advice for other CEOs leading DEIB work. Much of their messaging overlapped in describing how the head of the company should lead the executive team and employees to DEIB success. From Star Tech's CEO's perspective, approaching DEIB efforts should be like approaching any other major organizational change initiative as he explained:

The CEO has to be the leader of this process like the CEO should be for any major transition. An organizational cultural transformation is going to take CEO leadership and buy-in at the next level of leaders. If not, it will simply be something that has been in many companies for years—an add-on.

Similarly, another executive offered, "The most important aspect is the CEO being emotionally dedicated to the change in their company's culture." Another explained, "Tone starts at the top. For any important initiative to work, it has to start at the top with the leadership and that starts with the CEO. You can't push anything forward without that." In addition to tone and emotional dedication, another leader emphasized commitment urging, "You have to be committed. You cannot just put somebody in charge

of it and then check out. You have to do the work and people have to see you lead the charge.” The CEO became even more specific about a CEO’s role in leading DEIB change adding:

The only person that should be the DEI officer of the business is the CEO. If it's anybody else, then that person is always trying to get attention and resources from the top leaders to make changes. My true title is CEO, but in addition, I'm the Chief Diversity Officer.

The gravity of the responsibility, being visible, and vocal in your leadership were key messages of the advice offered to CEOs.

In word and deed, the Star Tech CEO modeled his advice and after reflection, one of the executives was able to describe the advantage of having a CEO who demonstrates strong conviction. He observed and experienced firsthand how the CEO’s unwavering conviction encouraged the other leaders to do the same, especially when facing criticism or pushback. He said, “Having him [the CEO] take such a personal interest and approach just gave me and the team more confidence to speak up too.” Further detailing the importance of CEO conviction, other leaders shared, “I think our CEO is very diligent and that has been the real reason why we've gotten to where we are. Because of the focus and commitment that he's instilled in all of us has made this happen,” and “It's the tenacity of the CEO and not giving up and not allowing the policies we were trying to create to become diluted.”

While conviction was the word out everyone’s mouth, the final piece of advice came from Tech Star’s CEO, from one CEO to another. Recognizing that the majority of

U.S. CEOs are white males, he offered this honest guidance and reflection of his own experience:

Progress will not be linear. Things will go well some days and terribly the next day, just like it is with leading any big change in a company. But if you've done the work of laying out the business case and committing to learning about how to go down, or even blaze your path, you'll make it. It's the stick-to-itness and grit, but always with your eyes and ears wide open because it's not a path that most of us, especially 60-year-old white guys, have been down before.

In this advice, not only does he give a glimpse of his experience leading DEIB change, but he also normalizes those feelings of “not knowing” or uncertainty that are often uncommon and unnerving for experienced leaders. The team provided more advice for teams leading DEIB in the organizations.

### ***Executive Team Advice***

The executive team was able to provide many pearls of wisdom for other teams and this section highlights the most common and poignant pieces of advice. Since time was one of the biggest challenges this team faced, it was not surprising that they all provided some advice on time and one leader stated it most clearly when he said, “Be ready for things to take longer than you think that they should.” That included time for planning, problem solving and discussing the important issues. One leader cautioned that plenty of time was needed, but not just for getting the work done. She spoke of the importance of setting aside time to process and reflect on the work together as a team. She said,

Make sure that there's plenty of time to work as a team in a space where you can talk freely, you can feel comfortable to say what might be judged as “the wrong things,” and you can debate things that you might not feel comfortable saying in front of your own team or the full company. That's valuable time and in a lot of ways our leadership team is tighter and more in tune with each other because of building trust and working through those things together.

When advice about building trusting relationships with colleagues came up, “expressing vulnerability” was another theme that came up in many of the leaders’ individual experiences and in the advice they provided. One executive offered advice on navigating vulnerability:

You have to admit you're wrong or you don't know something. You've got to follow up in times where you learned something new and realized that you might have been wrong in a meeting. That's important because it goes back to having team trust and knowing that you're going to have some failures and misunderstandings. This work is hard, you're going to mess up. At some point you will say and do the wrong thing. You still have to have each other’s back.

Once again, the leaders normalized some of the more painful aspects of the DEIB work by plainly stating, “these things will happen” so be ready for them and here is how you might navigate it more successfully.

Another area of advice was the need for a team effort and approach to organizational change. As one leader said, “It's important that the team not rely solely on the CEO or VP of Diversity, or head of HR. This work needs to be constructed and



delivered by more than a single person in order to be transformational.” Another executive added to those sentiments highlighting:

The entire leadership team has to have a stake in the work. They're the ones that are in the spotlight and who people look to. And if they're inauthentic, it doesn't work. It has to be authentic, and the commitment has to be real.

The CEO said, “every company's journey is going to be different” referring to how DEIB can mean different things for each business and the way it fits into the business mission is unique and depends on the company culture. All of these factors support the leaders’ experience and urging that it takes a unified leadership team to go through the steps for building trust, defining the work for their company in ways that are realistic and authentic. All of which require trust and vulnerability as the team works through issues and builds shared understandings of the goals and its benefits to the business.

On more personal levels, some executives shared some of their deeper learnings and what they wished they understood better when they started in the work. One executive talked about the shame that people sometimes feel when exploring and working through diversity and inclusion. He admitted grappling with feelings of shame and said,

There is some shame that comes. I felt self-shame and there was some ego in it, but more shame. I would tell myself, “I should know more of this. I should be more involved.” I would say to others, let the ego go and trust the process and your team. The thing that made it hard for me was I didn't want to offend others.

This leader was not alone in facing feelings of shame and fears of offending or saying or doing the wrong thing. In building capacity to successfully lead DEIB work, having

challenges named and normalized is critical in the process, which makes this advice even more valuable. Another executive shared advice around clarity that emerged for her as she grappled with the work on more personal levels. Over time, she experienced frustrations in leadership team meetings, but she did not have the language to fully explain to her colleagues what she was feeling and experiencing during those meetings. What she eventually came to understand and wanted to share with other teams learning and leading DEIB change was, “Even when a person’s opinion does not carry the same weight as leaders or a higher-level leader in decision-making, that person’s experience is still valid, and their opinion is often worth considering in some ways. In this work, leaders have to always remember that.” She further explained her thinking by adding,

There were times when I felt like my experience of something was different and it was minimized or dismissed. I found myself wanting to tell my colleagues, “My experiences are no less important than yours or anybody else's at this table.”

That’s what we all need to understand about this work. Everyone’s experience matters, even if you don’t understand it, agree with it, or can’t perfectly accommodate it in decision-making.

The leader felt strongly about these points and continued by explaining that a person’s position or high level of authority does not mean that their experiences are somehow more valuable or valid than someone else's. Her words are significant because in a culture where “majority rules” and the traditional, dominant perspectives and values are most important and influential in decision making, it can be easy to knowingly or unknowingly discount or invalidate another’s experience. For example, the executive highlighted that it

sometimes felt like her colleagues “decided that some opinions were less important or not equal” and that thinking was justified by authority to make a final decision was often conflated with making space to consider and value others’ perspectives. She offered to other executives and leaders,

Maybe their opinion isn't weighted in the same way yours is, maybe they don't understand the demands of running a business as you do. You still have to be able to find a way to hear and reflect on their experience and perspectives that led to their opinion or concerns. You can't just ignore them or overlook the experiences and needs of the “outliers.” That just doesn't work in a culture of inclusion and belonging.

This executive’s advice surfaces an ongoing challenge of leading and sustaining a culture of inclusion in organizations—while all opinions will not carry the same weight in decision making, how can leaders create space to at least recognize and consider the opinions not answered or satisfied by the decision? At the time of this study, there was no answer provided for that question, but the team’s learning and advice helped us to get further in our exploration and problem solving.

### ***Consultant Advice***

The executive team hired a DEIB consultant to help them lead the changes in their company. There are multiple approaches to working with a DEIB consultant. For example, the services can be in the form of coaching, advising, strategic planning, implementer, strategic partner etc.). Tech Star intentionally sought a consultant who would be a strategic partner who allowed the team to be an integral part of the strategic

planning and decision-making. In other words, they wanted a “hands on” approach as they took the lead in guiding the work as opposed to the consultant directing and implementing the work. Their consultant was meant to be more like counsel who provided insights and guidance as needed. The CEO described the relationship:

On a ship, when you go into port, you bring a local pilot onboard. They bring him out in a tugboat and put him on your ship. The ship has all the navigational aids, and they don't really need a pilot, but every ship brings a pilot on, and they go aboard but they don't touch anything. That pilot isn't in command of the ship, but the captain checks in with them to make sure they are on the right path. The pilot is there to tell the captain about certain and unique details about getting to port that the captain wouldn't know about. The pilot is the locally sourced, highly knowledgeable person who knows the best way to enter that port. I think about our consultant as the company's DEIB pilot.

For the executive team, the consultant helped them understand the DEIB concepts and issues and consider how they applied in the workplace and within the mission of their company. She provided advice and insight into best practices, helped them avoid “landmines,” or dangerous situations, and she helped them understand the underlying issues of some of the challenges and develop a deeper understanding of the process and opportunities for change. The consultant also served as a neutral facilitator and coach, regularly meeting with each executive 1-on-1. Based on their experiences and how initially, they didn't fully understand or appreciate what the consultant's role could be or

how she could support them as they lead the work, the team was adamant in wanting other leaders to understand how useful a consultant could be in the process.

For the team, it was important that their discussions and decision-making processes incorporated everyone's opinion so they could understand where they agreed and disagreed and be able to more fully own the decisions made as a team. With so many moments when their individual priorities, lived experiences, and values led them in different directions, the team dealt with disagreement and confusion. Even if they did not reach total agreement, the goal was to at least build shared understanding, stronger alignment, and a path forward they could all genuinely support. It was important that they partnered with a consultant who provided expertise in navigating DEIB work, served as a confidential coach, and thought partner for the leaders to process and reflect on the work, and who also facilitated the critical meetings and conversations to help ensure that everyone was able to contribute, be heard, and have accountability and support in the work. Going into the work, the team did not fully recognize the different ways they could utilize the consultant's expertise. Most of the leaders admitted to initially expecting the consultant to do the bulk of the work, while they would be more passive observers or "cheerleaders from the sidelines." They quickly recognized the consultant would be more of a partner, as they did the work, and they quickly came to appreciate her in that role. One leader described the experience:

By doing the work alongside somebody, we own the work, and that person is there to help us along and figure it out. If we had somebody come in and say,

“Here's a blueprint, do it,” I don't think our hearts would've been in it as much as this.

The CEO shared similar sentiments:

I think in cultural transformations, we need something more than a consultant to come in, listen to people, give us some instruction, tell us what should happen, and then leave. That's usually what consultants do, but that's not what we needed. That's not really a partner in change. It's much more productive to have somebody to go down the path with you, not just lay out your itinerary, hand you the map and tell you where to go.

For such a high performing, involved leadership team, it was important that they were the drivers and deciders of the work, and that they had the proper learning, support, and encouragement along the way. They welcomed the opportunity to share this aspect of the work with others.

### ***1-on-1 Coaching***

During the 1-on-1 sessions with the consultant, the leaders were able to speak freely and confidentially to reflect, process and figure out how to be authentic and supportive of others and the work. One leader described the opportunity noting, “in our one-on-one sessions we could talk even more candidly than we would in front of everybody. In general, I try to be transparent, but obviously, there's a limit to that.” This safe space provided by the consultant allowed for even deeper reflections and a space for the leaders to practice and engage their new learning in a private space.

### ***Meeting Facilitation and Accountability***

The team also suggested using the consultant to help maintain accountability and facilitate conversations. Typically, consultants are paid to bring their expertise and tell the truth about a situation using their expertise as the lens for directing that information and any advice. As an independent and neutral party, the DEIB consultant was expected to say things that some of the leaders may have been hesitant to say because of fears of upsetting their colleagues or out of respect for power differentials. Consultants do not face those same constraints as one person explained:

You pay consultants to tell you the truth, even if it's something you don't want to hear. If the consultant tells the CEO something that they believe is in the best interest of the business or team, even if the CEO gets angry, has strong words for the consultant, or worst yet, threatens to fire the consultant because he does not like or agree with what's been shared, that consultant should absorb that reaction because that is the responsibility of a consultant. That is an inherent occupational hazard for consultants. They accept the potential for sometimes contentious and uncertain conversations and consequences.

Most consultants, especially DEIB consultants, recognize the responsibility and nature of their role. Employees on the other hand, have different expectations and need for security within their role. Employees, including executive leadership, may lack the credibility or courage to challenge or deliver difficult information to their boss and peers. These are all important factors when the team needs to have honest and candid conversations. One leader said, "It's the consultant's job to facilitate dialogue and activities to help people process and work through things, especially the really challenging issues." Another

leader said, “consultants shouldn’t just ‘drop bombs’ and leave clients to deal with the aftermath on their own. We hire them to actually help us deal with and survive the bombs!” Similarly, another team member described the experience by comparing it to what might happen in other organizations:

Other leaders I've talked to didn't work with a consultant. Their companies put somebody in HR in charge of it and they just said, “go figure it out.” Our consultant led us to dig deep and brought structure to our team as we approached this and that has been the difference in making this successful.

In addition to helping the leaders navigate, the consultant also helped create space in the conversation for everyone to participate fully. Using himself as an example, the CEO detailed this aspect of the facilitator’s role in meetings. He shared,

Facilitators at times have to be cognizant and trusted enough that when the leader in the meeting is participating in a way that is less than productive, there's a way to dial it down so that the group can get back to where they need to be. I say that full well knowing that there were times where the consultant had to dial me down or lead us to pause because my natural sense is to drive [the conversation] to conclusion or drive to an outcome and that sometimes needed to be tempered until we could get more perspectives on the table.

It's the balancing act between hearing from everyone.

Whether it be quieting voices that are too loud, encouraging the voices that are missing or too soft, or just saying what others are too afraid or uncomfortable to say, the consultant helped the team move conversations forward in ways that were respectful, even in



conflict and that promoted equal voice among the leaders.

### *Celebrate Successes*

As hard as the work was, the executive team also experienced small and big wins along the way. They advised others to take time to reflect on gains and celebrate the wins:

When you're in the work you realize it's hard work. You can get really down in a moment and think, this is *really* hard. Then, when you get out of the day-to-day of the hard work, you take a step back and look at it and think, "Wow, we really did create something awesome." I would say to others, "Do more reflecting on all the change that *has* happened through the work."

As another executive stated more simply, "The work is grueling, make sure you celebrate the wins." The advice provided by the executive leaders was deeply rooted in their own experiences and insights gained throughout their DEIB change initiative. For CEOs they offered advice centered on the importance of their lead in driving DEIB success, emphasizing the need for emotional dedication, commitment, and unwavering conviction. For the entire executive team, they stressed the importance of that level of leadership being the driver of organizational change and the necessity of authenticity and visibility in fostering a culture of diversity and inclusion. The section concludes with advice for how to best partner with DEIB consultants and a call to celebrate successes and acknowledge the progress made in DEIB efforts, as opposed to being entrenched in, and buried by the gravity of the hard work and challenges. Overall, the advice provided by executives emphasizes the importance of executive commitment, leadership, and collaboration.

## Chapter Five - Discussion

Predictions that no single ethnic or racial majority will exist in the United States by 2055 (Cohn & Caumont, 2016) underscore the pressing nature of DEIB in the workplace and the necessity for organizational leaders to integrate diversity meaningfully within their organization. Although academic research literature on organizational change is extensive, DEIB-focused change, particularly pertaining to the roles and experiences of executive and high-level leaders remains scarce. The purpose of this study was to uncover the deeper perspectives and cognitive and emotional experiences of executives leading DEIB, including how their thinking, attitudes, and actions may have evolved and changed over time. This qualitative exploration revealed their personal and professional experiences, highlighting both the challenges and successes on their journey helping to fill the critical gap in existing scholarship that fails to adequately address the unique perspectives, roles, and needs of executives driving transformational DEIB change.

The research questions that guided this study were:

- How do executive leadership team members experience their participation in a sustained DEIB-focused organizational change initiative?
- What have the executive team members learned through their experiences engaging in the DEIB change initiative in their company?

Using CC and positionality as analytical lenses for the study, there was an emphasis on self-awareness, reflection, and action to challenge and transform company policies and culture to build a more diverse and inclusive company. Through interviews and document analysis, the study sought to capture the narratives and experiences of these leaders,

contributing valuable insights to other leaders undertaking similar transformative efforts.

This chapter will synthesize the findings of this study by presenting key themes identified to address each of the research questions. After presenting the study's findings, the I will present implications of the study, including connections to the research literature and theoretical framework presented in the Literature Review in Chapter Two. Next, the chapter discusses recommendations for future research and the strengths and limitations of the study and ends with concluding thoughts.

**RQ1. How do executive leadership team members experience their participation in a sustained DEIB-focused organizational change initiative?**

The Executive Team's experiences leading DEIB change exceeded their expectations. Initially, nearly all of them anticipated a passive learning experience but immediately found themselves actively engaged in intimate conversations, deep self-reflection, and new ways of approaching leadership. The realities of leading the work challenged their preconceived notions, traditional leadership styles, and led to an experience that blended their personal and professional growth.

**Collective & Individual Experience:**

The leaders' experiences were characterized by both individual, personal encounters and collective, team-based encounters. This dual experience lens provided a deeper understanding of the nuances of the participants' experiences. The collective experience encompassed the team's collaborative efforts to understand, implement, and uphold DEIB values within the organizational culture and mission. It encapsulated the dynamics of teamwork and collaboration, navigating challenges, as well as fostering

unity and synergy. On the other hand, the individual experience lens shed light on the varied motivations driving each leader's approach, along with their personal obstacles and transformations.

A notable aspect of their collective experience was that they participated in an approach to leading DEIB that differs from the one often discussed in DEIB change literature. While DEIB leadership and organizational change should be the responsibility of executive leaders, they are frequently delegated to a single person or department within the organization (Ng & Sears, 2018; Nwoga, 2023; Zak, 2020). Therefore, the findings regarding the team's experiences with a collective leadership approach are among the most significant aspects of this study. They support the argument that successful organizational change requires strong visibility and leadership from all top-level leaders and managers. Additionally, their successful collective leadership approach underscores the importance of leadership teams being adequately prepared and ready to respond and effectively lead DEIB change (Cox & Blake, 1991; Ng & Sears, 2018; Nwoga, 2023; Ray, 2019). This study not only presents a counter narrative to the practice of entrusting the leading of DEIB initiatives to one individual, but it also affirms existing research that emphasizes the importance of relying on teams for implementing change initiatives rather than solely depending on one person (Gardner & Ryan, 2020; Hogan et al., 2023; Ng & Sears, 2018; Nwoga, 2023).

The executive team members found themselves embarking on an unexpectedly transformative journey, one that profoundly affected both their personal development. Initially believing they would have only superficial roles in the DEIB leadership, the

team instead found themselves deeply engaged in the initiatives. At the individual level, most of the executives experienced transformational change as they were significantly impacted on a personal level. A notable aspect of the leaders' individual experiences was their own personal growth. In addition to statements of how they expected others to change but they found themselves being changed instead, there was also a new recognition that the goal of "changing hearts and minds" was too idealistic and that people were in different places in terms of their interest and growth in the DEIB work. With that growing acceptance, they also shifted to focus on more practical aspects of the work that were less subjective and geared towards changing behaviors and outcomes, not values and opinions. In this way, their experiences aligned with the literature on attitudinal change that warns that modifying individuals' personal values and belief systems is challenging and not easily motivated by external factors (Piderit, 2000; Armenakis et al, 2007; Weiner 2008; Choi, 2011; Onyeneke, & Abe, 2021).

Another significant factor in the leaders' personal experiences was their development of CC. Through reflective practices and critical dialogue, the executives experienced personal and professional growth as they worked to enact DEIB change. Cultivating DEIB change necessitates practices that encourage individuals to first reflect on and contemplate their own identities and then how they navigate social spaces (Danielewicz, 2001). In this study, that process involved reflecting on experiences of prejudice, bias, and stereotype, all of which can influence shifts in perceptions of identity relevance and sense of belonging. Heightened self-awareness and understanding of these contextual dynamics helped to facilitate the leaders' development of the willingness,

commitment, and opportunities to become personally engaged and challenge barriers to supporting diversity, and inclusion in the workplace (Danielewicz, 2001; Pitner & Sakamoto, 2005; Seider et al., 2017).

### ***Critical Consciousness and Positionality in Leading DEIB***

In leading the DEIB work, the executive leaders became more keenly aware of the societal, organizational, and personal factors shaping their perspectives and actions. This awareness enabled them to critically analyze and reflect upon their own biases and assumptions, facilitating a journey of continuous learning and unlearning which, in turn, led to significant self-initiated shifts in their beliefs and practices. CC's role in this transformative process was pivotal—the leaders not only grew to identify and understand systemic inequalities, but they also actively engaged in critical dialogue and action as a result of their growth. Through critical dialogue, also known as a continuous process of discussion, reflection, and action, the leaders reflected upon their personal experiences in relation to privilege, power, and social advantage. As a team and in their individual time they engaged in discussions about the ways in which organizational and sometimes societal structures needed to be transformed to achieve more equitable outcomes.

Unlike more traditional forms of dialogue that may aim simply for understanding or consensus, critical dialogue is transformative in its goals aiming to foster deeper understanding *and* catalyze change in both individual attitudes and institutional practices. One key aspect of critical dialogue is the inclusion of diverse voices, particularly those that are often marginalized or silenced. The team's increased efforts to be more intentional in soliciting, considering, and at times, prioritizing diverse voices and

perspectives in decision making reflected this new leadership practice of critical dialogue and action. In this study, the findings illuminate how through the leaders' work with the DEIB consultant, their development of CC led to critical dialogue and action as a natural progression and process as they lead the work.

As a lens, CC also provided insights about the executive leaders' processes of navigating the complex intergroup dynamics of DEIB and developing strategies that aligned with both personal growth and organizational development. The commitment and action to make shifts to further integrate DEIB into business strategies could also be attributed to the leader's individual and collective experiences of heightening their self-awareness, engaging in critical reflection, and critical dialogue. These processes proved to be critical in catalyzing change in both the leaders' individual attitudes and in leadership and organizational practices.

The findings reveal that as their CC grew, in many ways, the executives were compelled to reflect on the ways their personal identity and positionality impacted their actions, and how they were perceived within the executive team and other employees. As a framework, positionality highlighted the significance of contextualizing individual experiences within broader collective or societal contexts (Harding, 1991). Through this lens, the leaders learned to analyze viewpoints from their individual context and within broader contexts. Their natural adoption of this process of broader reflection represented crucial learning because like in most businesses, the role of executive leadership was situated atop a strict hierarchical structure. Even within that social location (executive leadership team member), to gain deeper understanding and effectuate change, the leaders

had to consider intersections of other social locations (i.e. self-described positionality and external perceptions of their positionality). Considering their diverse intersecting identities and unique life experiences, each leader was perceived differently by both themselves and others. Sometimes, individuals' self-perceptions diverged from external perceptions, and the positionality framework invited deeper analysis of personal identities and roles, contextualized within perceived relational and power dynamics. Clear examples of this were how the female leaders often grappled with how gender contributed to how they were perceived and treated as leader, or how the white leaders struggled to make sense of leading in spaces where their racial identity led to assumptions and perceptions of them as “the oppressor” when that was not how they viewed themselves.

### ***Reflective Practices and Critical Dialogue***

Drawing from insights gained through their experiences and innovative approaches, the team meticulously revamped their approach, actively building upon their understanding of DEIB and strengthening their organizational strategy. Over time, as their knowledge and experience grew, so too did their willingness to engage in difficult conversations, reflect on their actions, and continue to make necessary changes in their approach. These profound shifts in both personal outlook and company culture were fostered through sustained engagement in critical dialogue and reflective practices, facilitated by coaching and intentional cultivation. This transformative journey underscores the pivotal role of external resources such as consultants, DEIB coaches, or tailored support mechanisms in guiding leaders through a reflexive process and equipping



them with effective strategies for navigating the multifaceted challenges of DEIB transformation. It further highlights the critical gap in available support and research focused on elucidating the demands of DEIB work and offering leaders viable strategies for addressing its personal, emotional, and professional intricacies within the workplace.

### **Motivation and Commitment**

The team demonstrated diverse motivations for engaging in the work, including CEO directives, social justice, and business objectives. Although there were no indications that any team members were tempted to not participate in leading the DEIB work, they were evidently influenced by extrinsic, externally driven motivators which ultimately dictated their behavior and involvement early on. The CEO's influence and commitment seemed to be the primary motivators for each leader, and for each of them, the better they understood the business purpose and benefits, the more motivated they became. A belief that a more diverse and inclusive company would lead to better business results and thereby increase the value and success of the company proved to be a key motivator and a driving force throughout implementation. The leaders' initial reactions and behaviors to the change project and implementation efforts support researchers, Ryan & Deci's (2000) claims that extrinsic motivations effectively prompt behavior. As a tool, extrinsic motivators helped shape how the leaders' interpreted and responded to the change efforts. In this case, the motivators positively impacted their willingness and engagement in the implementation efforts.

Further affirming existing change management research, as the leaders described how as they began to experience more intrinsic motivators along with the extrinsic

motivators, they began to lead with more authenticity, advocacy, and consistency. Also, they felt more driven to see the implementation strategies result in transformative change throughout the organization, and they reported that when faced with challenge, in those moments their resolve strengthened, similar to Chiu's (2017) assertions that in the workplace when individuals experienced intrinsic motivators in addition to the inherent work-related extrinsic motivations (i.e. job security, avoidance of negative consequences, bonuses etc.), they are more likely to go beyond basic procedures and efforts to think more critically about how to implement change successfully.

What is encouraging is that as the leaders' experienced personal growth and growth in their recognition of the value of DEIB for their company, they shifted from a sense of obligation and primarily extrinsic motivations to more intrinsic commitments to the goals and process. Their ability to connect the impact of their work with their core values resulted in motivational shifts and the process became profoundly personal, so much so that some of the leaders expressed surprise over the transformation in how committed and involved they became. These findings suggest that even for individuals who are minimally, or not initially personally motivated to lead DEIB change and feel that DEIB is "a distraction to the real work," the process of participating in the change project can lead them to clear and authentic personal motivation in the work.

As demonstrated in the study, as the team went through processes of implementation and experienced the results, their role in DEIB leadership became more than just communicating a goal or enacting a plan of action. The work and its impact, including the importance of their contributions, became real and tangible to the leaders in

ways that overlapped with, and affirmed their values and beliefs. As opposed to feeling forced to adopt particular values or meaning in the work, they were able to identify aspects of the work they considered to be most meaningful and aligned to their own personal and professional values. This process ultimately transformed their attitudes and behavior regarding the work, marking a significant addition to current DEIB change management literature. It demonstrates how in the workplace, leveraging extrinsic motivators to create initial DEIB change, and success can possibly lead individuals to deepen their own connections and commitment to DEIB through the process of identifying personal connections that feed intrinsic motivations.

Additionally, the extent to which executives relied on extrinsic motivation to drive their engagement in leading DEIB initiatives appeared to align with their level of commitment and reliance on business imperatives as rationale for prioritizing DEIB within the organization. Likewise, the executives who exhibited ongoing growth in intrinsic motivation demonstrated a corresponding strengthening of their connection to the moral imperatives underlying the integration of DEIB within the company. This suggests a need for further research into facilitating opportunities for self-initiated shifts in individuals' behaviors and attitudes, especially the behaviors and attitudes that cannot be directly controlled in change efforts (Piderit, 2000; Armenakis et al, 2007; Weiner 2008; Choi, 2011; Onyeneke, & Abe, 2021).

Focusing on shared goals, this team worked well together, however, their individual motivations driving the work varied, evolved in unique ways over time and even shared motivations were relied upon in different ways depending on the situation

and circumstances. Further investigation is necessary to delve deeper into the spectrum of motivators in DEIB change initiatives, identifying which motivators individuals predominantly rely on and the specific circumstances that prompt reliance on particular motivators.

### **Personal and Professional Overlap**

Unlike other workplace change initiatives, the DEIB work blurred the lines between the leaders' professional and personal lives in new and sometimes intimate ways. One of the most obvious examples of this amongst the leaders was when they faced additional scrutiny from employees, not solely regarding their business-related decisions, but also in relation to their personal identities and positionality. Even though the female leaders expressed familiarity with being stereotyped and judged in the workplace based on their gender, they, along with their male counterparts, reported experiencing stereotyping and heightened judgment based on their individual identities and life experiences (i.e., race, economic status, gender etc.). In a professional setting, these leaders, like most, anticipated scrutiny and assessments of their work-related leadership performance, but facing judgment based on perceptions of their personal identity and attributes was a new and uncomfortable experience, particularly for the white men who seldom faced being the target of negative stereotypes and biases, especially not in the workplace. These encounters introduced an additional layer for the leaders to navigate in order to effectively steer the company through DEIB transformation. Indeed they were accustomed to additional layers of challenge in projects, but not challenges based on their identity or expectations they openly discuss or justify aspects of their personal life.

As the research indicates that white men predominantly hold leadership roles in U.S.-based companies, a trend that increases with the level of leadership (Shelton & Thomas, 2013; Verdeja-Woodson, 2023), this underscores the urgency for focused research aimed at delineating the distinct emotional dynamics inherent in leading DEIB organizational transformations. Such research could offer invaluable insights and strategies tailored for leaders who may not be accustomed to intertwining their personal identities with their professional roles and leadership styles.

### **Maintaining Authentic Leadership**

In leading the DEIB efforts, the team maintained a culture of authentic leadership emphasizing genuineness, honesty, transparency, and integrity in their interactions and decision-making. This was central to their experiences for two reasons: First, from a professional standpoint, it was crucial that their DEIB leadership and commitment to the work were authentic and perceived as such. Second, as change readiness literature suggests, shifting an individual's values and belief systems can be challenging since it is dependent upon the person's readiness and willingness to change. (Legate & Weinstein, 2024; Onyeneke, & Abe, 2021; Welton et al., 2018; Weiner 2008). Recognizing that, the team never aspired to change each other's personal values or beliefs and expected that diverse perspectives would be represented within the group. Furthermore, the team focused their attention on business related matters and the processes and behaviors most directly impacting them (ex. Hellerstedt and colleague's (2024) business case logic which centers business outcomes as the driver for the specific changes to individual behavior), as opposed to relying on more subjective approaches that and focused on individual

changes (e.x., Hellerstedt and colleague's (2024) moral justice logic which centers individual changes in attitudes and beliefs and relies more on individual interpretations). Consequently, the team naturally avoided attempts to subjectively shift personal beliefs and values and the pitfalls that come along with doing so. As such, the company's change initiatives focused on attitude and behavior changes related to the business and people were not expected or pressured into changing their personal values, beliefs, or ideologies. While some of the executives admitted to having hopes that people would grow and change in ways that in their opinion, would decrease bias and advance an inclusive culture, there was also a recognition that people could not be singled out or forced to change or adopt new belief systems.

The leadership team accepted and valued the diversity of perspectives and lived experiences represented throughout the company and often took time to explore differing perspectives on issues. The leaders reminded each other that the essence of diversity was represented in the spectrum of opinions and perspectives and there was value in that diversity and yet those same leaders provided examples of passionate debates and frustrations about how "stubborn" or "narrow minded" another's thinking felt. The findings showed that accepting and working through differences was not always easy and there were moments of self-righteous resistance to differing viewpoints, but even in those moments, people were not permitted to pressure others into changing their personal perspectives. Additionally, no instances of negative repercussions for expressing dissenting views or experiences were reported. According to the leaders, the absence of those two experiences (no pressures to change and no negative consequences for

expressing differing views) left them feeling that they could show up in work in ways that were genuine and authentic.

Another facet of the executives' experiences was that the common fears of being "brainwashed" or expected to adopt beliefs contrary to their own, or worse yet, fears of being coerced into actions that contradicted their principles or beliefs, were never confirmed. For example, some of the leaders expressed initial fears of others imposing their views and underlying DEIB agendas in order to change people's personal views and values. Specifically, there were concerns from those who considered their views to be more conservative or potentially at odds with contemporary DEIB values and goals. However, the open and inclusive approach to the work alleviated many of those fears and the leaders reported they felt as though they could lead with integrity and transparency. Even when they disagreed, rather than pushing each other to modify and align their individual values and motivations, they instead acknowledged and critically considered their differences (some more than others), and then focused on the shared company goals and the changes necessary to succeed in those goals. The main insight gleaned from that approach was the focus on change as the means to effect and advance the shared company goals, as opposed to a primary focus on just individual change and transformation. This distinction holds significance because existing DEIB change literature and training largely emphasize strategies aimed at individual attitudes and behaviors. However, this study highlights a need for research that specifically examines strategies that center organizational and individual behavior changes as they relate to achieving specific organizational, mission aligned, DEIB goals. Such strategies are

overshadowed by an emphasis on individual change and growth and the mission aligned approach is rarely presented or outlined as a potential path to successful DEIB organizational change.

### **Resilience and Growth Commitment to Transformation**

Throughout each leader's journey, a consistent and significant theme emerged: their shared commitment to initiating and supporting DEIB transformation within the organization. Their unwavering commitment was a strong driving force behind their efforts, even during moments of waning motivation or when met with challenges and pushback from employees or other stakeholders. As reported in the interviews, the team's collaboration with a DEIB consultant prepared them for the challenges ahead. The leaders also articulated, in various ways, a newfound understanding that the transformation process unfolds gradually, with success not always immediately evident. This realization helped sustain their commitment in the face of setbacks, sluggish progress, or feelings of stagnation. Coached to recognize signs of progress, even amid unmet immediate goals, they adopted a marathon mindset rather than expecting instant results, a significant shift for a team accustomed to clear, targeted outcomes. Armed with foresight and reminders that progress manifests in various forms and coupled with support to navigate their emotions and adjust their expectations, the leaders cultivated a deeper sense of resolve, patience, and enduring commitment to the work.

While the executive team achieved some degree of success, their experiences revealed that the existing research on promising DEIB leadership practices was inadequate and provided little guidance or insight for avoiding and overcoming obstacles,



some of which the team continuously encountered. Instead, the team navigated the work through a process of "trial and error" and at times, the trial-and-error approach proved to be timely and required more resources than they, like many companies, could afford. Additionally, in DEIB work, some errors can lead to devastating consequences as evidenced in recent social media and litigation trends (Lambert, 2017). In order to better support leaders who may be unfamiliar with DEIB leadership, faced with limited resources, or who are apprehensive about potential external and internal backlash if they "try and get it wrong," more information and resources that could lead to increased leader confidence should be added to the research literature. This includes studies focused on the practical experiences, strategies, and tactics necessary to help leaders build both the emotional resilience and tactical efficiency to implement and maintain successful DEIB efforts in their organization. Currently, research does not adequately address those concurrent needs.

## **Challenges**

### ***Time***

The executives found themselves grappling with a far greater time commitment than initially anticipated for planning and executing their tasks. The process involved extensive planning sessions, consensus-building endeavors, and ample time for reflection and more personal and emotional investments—approaches that were novel to them. Lacking prior experience, they struggled to gauge the appropriate time investment needed for these endeavors. Consequently, they often questioned whether they were dedicating too much time and grappled with decisions on what to prioritize and how to allocate their

time efficiently. Sacrificing and managing time emerged as a formidable challenge for both individual executives and the team as a whole. This discovery highlights the necessity for resources that offer realistic expectations regarding the time demands of leadership in DEIB initiatives and guidance on effective time allocation and management strategies. In light of the intricate nature of DEIB leadership, such resources should provide insights into the expected time commitment and delineate key areas warranting attention.

### ***Lack of Guidance and Proven Practices***

Among the myriad of challenges encountered by the leaders, a recurring concern was the lack of guidance and resources tailored for executives spearheading DEIB change initiatives. Despite the team's resourcefulness, the absence of comprehensive research and literature specific to organizational DEIB change impeded their progress and created barriers in their path. This deficiency hindered their confidence as they sometimes struggled with uncertainty regarding decision-making, figuring out how to best recover from setbacks, and dealing with the complex emotions and insecurities inherent in this type of work. There were moments when the leaders found themselves at a loss lacking credible and replicable models to emulate, or practical insights gleaned from the experiences of other leaders who had successfully navigated similar workplace transformations. These experiences underscore the dire need for robust research that can provide executives with the necessary tools and for this work. As noted by leading change expert John Kotter (1996), a crucial determinant of change success lies in individuals' psychological and behavioral readiness for the challenges ahead. However, as

evidenced by the findings in this study, the requisite information and support to foster such preparedness are sorely lacking. Mitigating this gap in research could significantly enhance executives' readiness to effectively lead and drive meaningful DEIB transformation.

### *Shifts in Leadership Approaches*

Another noteworthy challenge was the leaders' struggle to integrate their traditional leadership styles with the demands of the DEIB implementation work. When their usual leadership approaches failed to align with the approaches necessary for driving DEIB change, these skilled leaders found themselves unable to rely on the typical methods, such as swift decision-making, or logical, non-emotional approaches to the work. A prime example of a paradigm shift for the leaders occurred as they transitioned from the prevailing notion of "majority rules," where decisions were predominantly influenced by the views and requirements of the majority, while those in the minority were often disregarded as outliers or considered insignificant due to their limited representation. This transformation towards a more inclusive approach included attitudinal and mindset shifts in how the leaders' viewed and valued minority voices and experiences in decision making processes. The leaders began to actively seek out and consider the perspectives and needs of less dominant groups in new and meaningful ways.

Considering the leaders' experiences shifting their leadership approaches to better align with the DEIB change work, the various ways in which they had shifted their practices make me wonder in what ways does the research on process level change or prioritizing

attention to processes and deliberate process-focused change is and attitudinal level change, which centers modification of personal values and belief systems. (Welton et al., 2018) apply to the leaders' needs and approaches to transforming their leadership style. Currently, DEIB research literature does not effectively address the transformations that leaders might need to make in their leadership style in order to more effectively drive DEIB in their organization. Future research using the existing research on process and attitudinal change could provide leaders with more insights into how to prepare for leading DEIB change.

In their work, Welton and colleagues (2018) detailed the differences between process change and attitudinal change, also explaining the significance of these components in successful change endeavors within organizations. Reflection of the leaders' experiences as they adjusted their leadership approaches to better align with DEIB change efforts prompts consideration of how the research on process-level change, which prioritizes attention to processes and attitudinal-level change, which revolves around modifying personal values and belief systems (Welton et al., 2018), could be utilized to prepare leaders for necessary shifts in the leadership style and other preparations for implementing DEIB change. Presently, the DEIB research literature inadequately addresses these topics and there is a notable gap in understanding how insights from existing research such as process and attitudinal change could be applied to assist leaders in preparing for the challenges of leading DEIB change. Future research endeavors leveraging existing knowledge on process and attitudinal change have the

potential to furnish leaders with invaluable insights into how they can adapt their leadership styles to better facilitate DEIB change within their organizations.

### ***Developing and Tracking Metrics***

Throughout their time leading DEIB change, the team struggled with a common DEIB challenge, formulating metrics and mechanisms to monitor progress and achievements. Despite recognizing the critical necessity of metrics in driving and assessing organizational change efforts, the leaders constantly wrestled with identifying and delineating specific indicators of progress and success. Further compounding the challenge was the absence of available literature or resources providing examples of effective practices for evaluating and measuring DEIB change within organizations. Having minimal organizations or research as reference points proved to be as frustrating as confronting the daily obstacles. This daunting experience in their journey also points to the prevailing issue of inadequate research and resources available to leaders and need for more literature regarding the development and use of T and bench markings in the DEIB domain.

### **Emotional Labor**

Leaders grappled with their own vulnerabilities, skepticism, and the emotional complexities, which reflected a paradigm shift in their leadership style. The executives experienced a significant and unexpected level of emotional engagement in the work that left them grappling with their own insecurities and fears of leading the DEIB efforts. Additionally, they had to contend with others' experiences and manage a variety of diverse and sometimes conflicting viewpoints. One of the most daunting and unforeseen

challenges of the task was grasping and effectively navigating the sudden significance of their identity and positionality in determining others' perceptions of their credibility as leaders in DEIB. The emotional strain of confronting unfamiliar situations where their identity and lived experiences were scrutinized and judged by others weighed heavily, particularly when faced with such circumstances for the first time in a professional setting. As one leader explained,

In meetings it was weird knowing that as a white man, I was a part of the group that was seen as "the problem" and internally, I have to deal with my feelings about that, but also in real time, be open to being a part of that conversation without being defensive. That was tough! Those experiences were so different from my usual leadership interactions. I had to be more vulnerable and personally connected in the conversations. As a leader I had to be confident in conversations where honestly, I was still working it all out for myself and I was not feeling confident and I was scared I would say the wrong thing.

While these instances varied for each leader based on their individual identity and positionality, they each expressed dealing with the added emotional burdens brought about by such situations. They shared feelings of surprise at the necessity to confront others' perceptions, coupled with frustration and uncertainty about navigating these encounters effectively.

Another aspect of these situations that proved to be challenging was the expectation that they delve deeper into considering employees' emotions and vulnerabilities, while also demonstrating their own emotional openness and vulnerability.

For many of the leaders, the notion of integrating emotions into professional spheres and decision-making processes was entirely unfamiliar and surprising. As a result, they required extra support to navigate these new emotional dimensions of leadership and reported relying on the DEIB consultant for that support. The consultant provided them with a confidential and impartial space to express themselves, reflect, strategize, and receive encouragement as needed, which was crucial for their emotional well-being and effectiveness in their roles. Currently, there is a large gap in research that addresses the emotional component of leading DEIB change. Furthermore, the hypervisibility of executive leaders in DEIB initiatives accentuates the need for research addressing the emotional aspects of leadership in these contexts. Such research could provide valuable insights into supporting leaders' emotional well-being and effectiveness in their roles.

**RQ2. What have the executive team members learned through their experiences engaging in the DEIB change initiative in their company?**

The Executive Team's ambitions of DEIB leadership turned out to be filled with transformative learning that went beyond what they initially envisioned. Instead of being passive participants in DEIB trainings and simply signing off on plans to be implemented by someone else, the executives found themselves immersed in candid discussions, long planning meetings, profound moments of self-reflection, and ushered into new leadership approaches. The key lessons the participants learned revealed tangible and intangible personal and professional shifts. This included shifts in attitudes, expectations, behaviors and professional practices.

**Collective Voice & Effort**

A significant lesson learned was the importance of maintaining a unified voice and approach, because the absence of cohesion posed a risk of undermining both individual leaders and the overall DEIB efforts. This meant when the team met, leaders had to openly voice their individual concerns or disagreements so that at the team level, there was an understanding of everyone's position on the different issues and decisions. This sharing of individual perspectives required the team level to occasionally pause the work to engage in discussions aimed at fostering shared understanding and consensus regarding decisions and actions to be taken. It was imperative for them to arrive at decisions and actions that they could, collectively and individually endorse and publicly support.

The team placed a premium on unity in DEIB matters, for example, recognizing that any public statements made by the CEO or other executive members regarding DEIB efforts required unanimous agreement and genuine support from all team members. Given the high personal and professional stakes associated with leading DEIB initiatives, they acknowledged the importance of authentic consensus before proceeding with any decisions or actions. Notably, this included the CEO, who, despite being positioned as the head of the organization and typically having the authority to take public stances on behalf of the organization and make unilateral decisions (Ng & Sears, 2018), also recognized the necessity of consulting with the executive team and ensuring alignment with their views. By prioritizing shared understanding and consensus-building, the team navigated differences in perspectives by identifying common ground and crafting



decisions and communications around that shared understanding, thereby leading without compromising their values and beliefs.

### **Experiential Learning**

The learning journey was marked by a significant learning curve in both the understanding and application of DEIB principles. This journey was not just about grasping concepts; it involved integrating these principles authentically and effectively into the company's policies, culture, and daily interactions. The learning process was iterative, involving constant reflection and adaptation based on both achievements and setbacks. The individual leaders experienced this learning differently, each shaped by their unique backgrounds and experiences. Collectively, learning often stemmed from situations that required effective communication and active listening, essential for appreciating diverse viewpoints. This deeper understanding allowed the team to adjust and refine their strategies accordingly. For instance, during conflicts or when confronted with diverse opinions, the DEIB consultant played a pivotal role by facilitating discussions focused on helping the team to understand the issues at hand, identify challenges, and articulate their desired outcomes. These meetings aimed to find mutually acceptable paths forward, even if they deviated from the leaders' individual preferences. This approach was critical in preventing dominant voices, like those of the CEO or President, from overshadowing the collective input or rushing the decision-making process, a previous norm within the team. Leaders often cited these facilitated sessions as moments of significant personal and collective learning.

Reflective practices were central to the executives' processing of these experiences. These practices included reflective contemplation and self-consideration which led to deeper understandings of themselves and others, as well as a heightened, more profound awareness of different dynamics and “how social contexts influence who people are and how they behave” (Danielewicz, 2001, p. 156). Such reflections were most fruitful when the leaders considered their reactions to specific situations as they led to deeper understanding of their own values, attitudes, and behaviors. This self-awareness was central in their experiential learning and in developing a critically conscious approach to leadership. Through their self-reflection, they gained a nuanced understanding of power dynamics and the nuances between individuals and groups and this awareness ultimately informed the actions they took individually as a team. This practice aligns with scholarly assertions that critical reflection should inform meaningful action aimed at transformation (Watts & Hipolito-Delgado, 2015) and that critically conscious actors “concern themselves primarily with action: collective, sustained, mobilized action to transform inequitable social structures” (Diemer, et al., p.13. 2021). For the executive team, their actions were intended to directly or indirectly advance DEIB in the company culture. In this way, the executive team's actions were both a reflection of and a contribution to advancing DEIB in the workplace.

### **Experiencing and Understanding the Intricate Nature of DEIB Work**

The executive team gained a deep understanding of the intricate nature of DEIB work, appreciating its complexity and multilayered aspects. For example, one of their most challenging endeavors was establishing a shared understanding and practical

application of key terms like "underrepresented" and "inclusion and belonging." They had to learn and understand the nuances of the concepts and navigate the diversity of perspectives represented within the team. The team may have had shared overarching goals, but their individual experiences and understandings of the terminology and nature of DEIB work varied significantly. Early on in their work with the consultant they spent the bulk of their time learning the various definitions and contexts that defined the DEIB language and philosophies. Their experiences learning and interacting as a team further enhanced their DEIB education.

In interviews, the leaders talked about their “assumptions of sameness” and the specific ways they had assumed everyone else on the team had experiences similar to theirs or believed the same things they did. They also described experiences when those assumptions were disrupted, and they learned that the other person had differing experiences or perspectives. In real time, the leaders experienced what they were learning about diversity and diverse perspectives and had opportunities to practice engaging diversity in ways that were equitable and inclusive. They reported learning that they needed to rely on a more comprehensive understanding of DEIB, including terminology and language to ensure when they discussed a specific experience or potential DEIB action, they were all referring to the same thing and, in instances where they were not expressing the same sentiments, they needed the appropriate language and probing questions to help them to discern and clarify the differences. As the executives strategized on how to address and nurture the company DEIB issues, there were moments when they simultaneously found themselves having to negotiate the intricacies of DEIB

and how to address and nurture them within their own team. These experiences and moments of learning represent the caliber of insights that could help leaders understand and prepare to lead DEIB change in their own organization, but they are missing from the current literature on leading DEIB change in organizations and need to be further researched.

### **Integrating DEIB into the Business Strategy and Developing the Case for Increasing Workplace Diversity and Inclusion**

In his research, Zak (2020) introduced three primary steps for organizations initiating their DEIB journey: definitively delineate the understanding of DEIB for both the company and its stakeholders; pinpoint the key areas and actions within the DEIB plan; and delineate how leadership will support and advance DEIB strategies.

Even though the team may not have been familiar with this research, initially, their decisions and prioritizations aligned with those suggested steps. Early on they learned the value and importance of having a clear vision and strategy for DEIB change and it encompassed detailed aspects such as the rationale for the changes and what outcomes were expected. They also focused their attention on better understanding how diverse perspectives enrich creativity, decision-making, and foster a more inclusive company culture in hopes of further developing their rationales and strategies.

As they delved further into the work, the team began to better comprehend the necessity for a more specific rationale that underscored the value of all individuals in the company. They learned the difference between strategies aimed at increasing the presence and contributions of people from historically underrepresented communities and devising

strategies and rationales that were equitable and inclusive, irrespective of gender, race, or background. Specifically, the leadership team leaned into cognitive diversity as a strategy. They gained firsthand experience of the findings of researchers Wang, Kim, and Lee (2016), who posited that by providing a range of ideas, values, knowledge, and skills, cognitive diversity enables team members to pool information, blend ideas, and integrate diverse perspectives to generate innovative solutions to work-related challenges. Equipped with these insights, the team learned to intentionally address diversity issues related to underrepresentation in the workplace and improve business outcomes.

Aligned with this research, the executive team recognized the importance and potential impact of anchoring the business purpose for the DEIB initiatives in the center of their change strategy and communications. Based on their experiences, a significant area of learning was the need to articulate, and even overemphasize, the initiatives' connections to the overarching business mission and potential social justice imperatives in ways that helped ensure clarity and cohesion in driving DEIB work. Integrating DEIB into the business strategy and communicating those rationales broadly and often was one area in the findings where research literature exists and can be helpful in guiding executives to effectively lead DEIB change.

### **Implications for Future Practice**

The results of this study provide important insights for understanding the experiences and ongoing needs of executives leading and navigating DEIB change in their organization.

**Freedom in Participation and Freedom of Belief**

The results of his study highlighted diversity in the leadership team members' viewpoints, experiences, confidence levels, as well as their motivations and sense of commitment to the initiative. Throughout the project, there were moments when leaders had personal reservations or disagreed with colleagues on the team and when it came to certain viewpoints or proposed actions there was a divergence in beliefs and opinions. During interviews, leaders openly discussed feeling surprised and somewhat disillusioned when they encounter hesitation or skepticism from their peers. Despite these moments being described as "shocking" and "polarizing," they came to realize that everyone did not approach the DEIB work and associated social issues in the same manner. They also came to acknowledge, in line with research findings, that their colleagues' engagement was influenced from their beliefs and values, which also influenced both their conscious and subconscious behaviors, which could not be easily controlled or altered by external forces (Piderit, 2000; Armenakis et al, 2007; Weiner 2008; Choi, 2011; Onyeneke, & Abe, 2021). As such, the team continued to prioritize creating an environment where diverse perspectives and needs could be openly expressed.

During moments when the team had to acknowledge their differences, they also had to manage their emotions, especially expectations and disappointments, and refocus on the overarching goals. They focused on constructive dialogue and worked to understand more about each other's experiences and viewpoints. What was most noteworthy about these situations was the team's commitment to listening to understand and learn from alternative perspectives without imposing pressure on anyone to change

their views. While some individuals may have adjusted their perspectives after reflecting on new ideas and viewpoints, others maintained their initial viewpoints with an enhanced understanding of others' perspectives and experiences.

Assuring individuals that they would not face coercion or pressure to conform to specific beliefs or opinions, and that holding differing or controversial views would not lead to adverse professional consequences, proved essential for leaders to experience psychological safety and feel confident in their ability to authentically lead and participate in the initiative. This sense of psychological safety and confidence in authentic engagement is particularly crucial for fostering engagement and facilitating attitude and behavior change. This approach confirms arguments that authentic, transformative change cannot occur in an environment where individuals feel compelled or coerced.

### ***Balancing the Moral and Business Imperatives***

Leaders described motivations consistent with both business case logic and moral case logic (Hellerstedt, Uman, & Wennberg 2024; Johns, Green, & Powell, 2012), and what was interesting in their experiences was the way their motivations changed over time or were maybe selectively relied upon across different circumstances. Overall, the various motivational insights gleaned from this study emphasized the importance of aligning change initiatives with both moral imperatives and intrinsic motivations, as well as business imperatives and extrinsic motivations.

Hellerstedt and colleagues (2024) provide a clear description of contemporary models of moral justice logic, which focus on individual shifts in attitudes and beliefs.

They characterize this approach as subjective, emphasizing individual interpretation. Conversely, the business case logic prioritizes business outcomes and hinges on leaders' definition and orchestration of specific changes in individual behavior to attain those outcomes. While moral and social justice considerations can be significant drivers of DEIB efforts in the workplace, organizations must strike a balance by integrating these motivations with clear DEIB business objectives. The articulation of explicit business objectives enables individuals to better understand their roles and expected contributions toward DEIB-related goals. By clarifying the behavioral and attitudinal expectations associated with their professional roles, individuals are no longer compelled to engage in DEIB activities that lack relevance to their work roles and may potentially conflict with their own values and beliefs. Providing clarity regarding opportunities and their underlying rationales empowers leaders and employees to autonomously decide whether to participate in those additional opportunities aimed at fostering learning and community engagement through DEIB and social justice advocacy. By offering optional activities aligned with the organization's business mission—such as Employee Resource Groups (ERGs) or community involvement initiatives—organizations can effectively address inclusion and moral justice objectives while clearly defining their connection to business goals. When individuals understand the purpose and parameters of their work, they are better equipped to anticipate expectations and make informed decisions about their engagement, driven by business objectives rather than by the imposition of personal values and beliefs.

### **Operationalizing DEIB within Company Culture and Outcomes**



The research literature suggests three initial steps for organizations embarking on their DEIB journey: clearly define the meaning of DEIB for both the company and its stakeholders; identify the priority areas and initiatives within the DEIB plan; and outline how leadership will endorse and facilitate DEIB strategies (Zak 2020). The implications of the study highlight the necessity for DEIB initiatives to be closely integrated with the business mission and overarching company strategies. This strategic alignment can help ensure that DEIB efforts were not perceived as separate or external to core business objectives, but integral to the organization's overall success. Additionally, as organizational leaders strive to create inclusive environments where employees feel their personal experiences and beliefs are respected and they are not forced to conform to a dominant political or social viewpoint, clearly emphasizing purpose, expected outcomes, and connections to business goals helps to ground change efforts in company values and practices as opposed to individual and personal values and practices.

For example, having diversity hiring requirements that aimed to “create a workforce that mirrored the communities that company served” provided a clear purpose and expectation of how to measure and define diversity in the context of the business goal (a workforce that mirrors communities served). This objective does not require employees to engage or change their personal politics or beliefs to achieve this goal. However, for those interested in exploring issues of underrepresentation and historical underrepresentation of certain communities, there can be opportunities for those critical dialogues. Ideally, when DEIB objectives are grounded in the business mission and outcomes, individuals can focus more on their roles and performance in those roles, and

less on personal politics and beliefs. This approach helps to further create environments where individuals can more easily feel included and be allowed to “participate, contribute, have a voice, and feel that they are connected and belong, all without losing individual uniqueness or having to give up valuable identities or aspects of themselves” (Ferdman, 2013, p. 12).

### **Visible CEO Leadership**

The research findings unequivocally highlighted the pivotal role of the CEO in visibly driving DEIB change initiatives within organizations, emphasizing the significance of their leadership in ensuring change and fostering active engagement among other executives and leaders. Across the study, the CEO's leadership emerged as the most frequently cited factor influencing DEIB efforts. Participants consistently attributed their motivation and commitment to the CEO's steadfast leadership and unwavering dedication to the change project. This aligns with existing organizational change literature, which positions the CEO as a primary catalyst for transformative endeavors (Ng & Sears, 2018; Salancik, 1977). The study's findings also offer valuable insights into the impact of CEO commitment on team dynamics and individual contributions. The executives in the study experienced enhanced motivation and efficacy due to the CEO's consistent dedication (Ng & Sears 2018). This observation is particularly significant given that many leaders relied predominantly on extrinsic motivators, such as leadership expectations and external consequences, to drive their participation and commitment to engage in the change project.

A notable revelation from the study is the extent to which other leaders acquiesced to the CEO's leadership, highlighting the CEO's influence in shaping organizational direction and fostering alignment among executives. Despite any personal reservations, leaders uniformly rallied behind the CEO's vision, underscoring the CEO's pivotal role in setting the organizational agenda. Existing research underscores the critical need for CEO engagement, high commitment, and visible leadership in DEIB organizational change efforts. However, it also identifies a glaring gap in understanding how CEO's leadership roles in DEIB initiatives and how they can maximize opportunities for visible engagement within their organizations. Unfortunately, this area remains largely unexplored in current research, signaling a pressing need for further investigation and discourse on the topic.

### **Partnering with a DEIB Consultant**

The executive team's collaboration with a DEIB consultant yielded valuable insights for the developing and executing DEIB leadership strategy. Specifically, the study identified four distinct and crucial ways in which the consultant's involvement enhanced the leaders' experience in steering the work. First, the executives characterized their interaction with the consultant as a collaborative partnership. Unlike conventional consultancy approaches where the consultant designs a plan and dictates each participant's role, this partnership empowered the executives to lead the charge. While the consultant played a pivotal role in initiating open dialogues, challenging existing biases, deepening the leaders' knowledge of complex DEIB concepts, and presenting potential strategies for company policy and culture change, they all worked collaboratively.

Together, they assessed situations and made decisions at the leaders' pace, cultivating their sense of ownership over the DEIB efforts. This approach ensured that the DEIB strategies and their execution aligned with the organization's existing culture, values, and practices.

Secondly, collaborating with a consultant offered the leaders an external and neutral resource, enabling them to receive candid feedback and coaching without fear of judgment or adverse professional repercussions. This impartiality was essential for creating an atmosphere conducive to honest, introspective, and transformative discussions, allowing the leaders to navigate their emotional responses and develop practical strategies. Another noteworthy takeaway of the study was the significance of providing leaders with ongoing, confidential coaching. The results indicated that the consultant's coaching served as a valuable resource for the leaders, aligning with existing research findings that highlight the role of training and coaching in cultivating leaders' skills and mindsets, and enhancing their capacity and readiness to drive change (Errida and Lofti, 2021). Specifically, regarding the leadership of DEIB change, the coaching was instrumental in developing the leaders' CC further reinforcing Errida and Lofti's (2021) assertion that coaching also aids participants in developing intrapersonal skills like self-awareness and self-motivation.

Lastly, as the executives worked through the challenges of leading DEIB work, the consultant provided a "map" of what to expect along the way. By establishing clear expectations and familiarizing the team with potential challenges, the consultant played a crucial role in normalizing the experiences they might encounter. This process of

normalizing, defined as making something commonplace or ordinary by explicitly labeling or embodying it as "expected," or interpreting it in a manner consistent with routine (Svinhufvud et al., 2017), bolstered the leaders' confidence as they navigated difficult moments, unforeseen circumstances, and setbacks. Experts in organizational change suggest that building capacity for organizational change often involves preparing individuals for what they are likely to experience, thereby normalizing what may initially feel unfamiliar or uncomfortable (Watts, 2019; Weiner, 2009). In the context of the DEIB initiatives, this approach was crucial for helping the leaders feel more at ease and emotionally equipped to handle changes, uncertainty, and stressors. The process of normalization enabled the leaders to recognize that their feelings were common and should be expected, which can also foster feelings of calmness, self-compassion, and acceptance. Research suggests that by normalizing challenges, individuals are less likely to shut down and are more inclined to accept their struggles as a natural part of the process (Burnett-Pronk, 2020; Keelan, 2023). Given that the executives initially reported experiencing feelings of fear, uncertainty, and ambiguity, the consultant's efforts to normalize situations not only provided leaders with mental roadmaps of what to expect but also offered emotional support to alleviate their stress and tension.

### **Recommendations for Future Research**

The development of successful transformative DEIB plans is dependent upon the specific business and cultural contexts of the organization. More research is needed to develop measures for effectively assessing how DEIB practices and methods can be

tailored to identify and meet the unique needs of a company's culture and business mission. Similarly, leading successful transformational DEIB change is dependent upon the preparation and readiness of the leader. This study was driven by the lack of research addressing executive leaders' preparation and readiness for implementing DEIB organizational change. The findings identified multiple areas where additional research is urgently needed in order to address implementing transformative DEIB change in the workplace, such as how to effectively define and measure DEIB progress and outcomes in organizations, and how to better support executives faced with leading and navigating DEIB initiatives. Based on the findings of this study, here are recommended areas for further research:

- Exploration of the personal psychological and emotional barriers that leaders encounter, such as feelings of doubt, frustration, or ethical dilemmas.

Understanding these internal challenges is crucial for developing support systems and training programs that enhance leaders' emotional resilience and decision-making capacity in the context of DEIB leadership.

- In this study, the white participants struggled to make sense of leading DEIB change in spaces where their racial identity led others to make negative assumptions about their lived experiences and they were perceived as an "oppressor" and socially problematic. More research is needed to understand this experience and address how leaders can navigate these challenges.

- Researchers Brook et al. (2016), highlight the process of unlearning as crucial for the transformation of beliefs and practices. Further investigations of how leaders can engage in processes such as CC and critical dialogue to help facilitate continuous learning, unlearning, and the reconstruction of knowledge in relation to leading DEIB transformational change.
- To better understand the long-term impacts of DEIB initiatives on organizational culture and business success, future research should include longitudinal studies. These studies should track:
  - The evolution of DEIB strategies over time, providing insights into their sustainability and the lasting effects on employee engagement, retention, and company performance.
  - The experiences of personal change and sustained personal transformation for those leading the initiatives.
- Continuous monitoring and evaluation of DEIB initiatives are essential to understand their effectiveness and make necessary adjustments. More exploration of assessment models and standardized metrics is needed.
- A multinational lens to support culturally appropriate and effective global DEIB organizational change is needed. DEIB practices may vary significantly across different cultural contexts and geographic locations so additional research should focus on understanding how DEIB initiatives can be effectively implemented in and across diverse global settings.

### **Limitations and Strengths of the Study**

This qualitative study yielded valuable insights into the experiences of a team of executive leaders attempting to lead transformational DEIB organizational change and it is important to acknowledge the strengths of the study as well as the limitations. As previously discussed in Chapter Three, one limitation of the study was my dual role as researcher and DEIB consultant for the leadership team. Arguably, my existing relationship may have influenced the analysis and interpretation of data, affecting the validity and reliability of the findings, but despite that possibility, my existing relationship made the rich data collected in the study possible. My previous work with the study participants helped to facilitate trust which allowed for more candid feedback in the interview process. While the relationship could have also inhibited participants from expressing critical reflections or negative experiences regarding the consultant's role, overall advantages outweighed the risks.

Another limitation to be noted is the study's sample size. Although the study was intentionally designed to focus on one company and its leadership team, the study's small sample size and close working relationship among participants raise concerns about confidentiality. Despite my reassurances of confidentiality, participants may have felt compelled to censor their comments to avoid negative judgment or repercussions, compromising the depth and honesty of their responses. Possible concerns about confidentiality may have led the leaders to participate solely to avoid negative repercussions for non-participation. Additionally, the study's focus on only one executive leadership team limited the generalizability of findings to other organizational contexts.



The specific contextualized experiences of the participants may not be easily replicable in other settings, limiting the applicability of study findings. Lastly, the study lasted three months and this short duration precluded detailed analysis of the efficacy and long-term impact of the team's change efforts. The lack of longitudinal data further hinders the assessment of sustained transformational change and its impact on the individual leaders and organizational policies and culture.

### **Concluding Thoughts**

This qualitative study provided a nuanced exploration of how a team of executive leaders experienced and navigated personal identities, professional roles, and an uncharted area of leadership to drive transformation DEIB change in their organization. Their journey was transformative, reshaping not only their professional ethos but also permeating personal beliefs and values, which was a development that took the participants by surprise. In this study the collective and individual experiences of the leaders further underscored the value of an executive, team-based approach to DEIB initiatives, illustrating the effectiveness of collective leadership, where all executives are actively involved and invested in the DEIB agenda. This approach not only enhanced the integration of DEIB values across the organization, but it also cultivated a more cohesive and supportive environment for change.

The executive team experienced some success along the way, but their journey was not without its challenges. The lack of existing research, resources, and proven practices in DEIB leadership was a significant barrier, often leaving leaders to rely on

trial and error and perseverance. The leaders often felt left to forge their own path in DEIB change and were able to do so by fostering an environment of reflective practice and critical dialogue. Through these lenses, the leaders examined their own values, biases, and assumptions thereby deepening their engagement with the challenges and opportunities of DEIB work. This introspective process not only facilitated personal and professional growth but also paved the way for more effective and empathetic leadership practices.

Overall, the executives discovered that effective DEIB change is not a superficial endeavor but necessitates fundamental changes to leadership paradigms and corporate structures. This process of change was predicated on clear communication, thoughtful strategy, and collective dedication to the goals of business and initiative. The leaders learned the pivotal role of aligning DEIB efforts with the business's mission, ensuring that initiatives remain focused and resonant within the company's broader objectives. Their experiences offer key lessons: DEIB initiatives are not merely add-ons but integral components of the business strategy; this work needs to be visibly driven first and foremost by the CEO and supported by the entire executive team, critical reflection and dialogue are vital for personal and organizational growth; and, most importantly, genuine leadership commitment is the driver for successful DEIB implementation. These insights highlight that DEIB is not just about policy changes but also about a leadership willing to engage with and be changed by the initiative itself.

This study makes several significant contributions to the existing scholarship on DEIB organizational change.

- 1) The study highlights ways in which a CEO's visible commitment and leadership are pivotal in influencing executive motivation and engagement in DEIB change efforts and reinforces and expands upon organizational change literature, by specifically linking CEO behavior with the effectiveness of DEIB implementation.
- 2) The study challenges the conventional practice of delegating DEIB change leadership and responsibility to a single individual or department. By documenting the successes of a collective leadership approach where all executives are actively involved, the research contributes to a nuanced understanding of how DEIB can be more effectively led by executives and integrated into organizational culture and practices. This supports and extends previous research that emphasizes team-based change efforts over individual-centric approaches.
- 3) The study focuses on the development of CC and the role of positionality in DEIB leadership and provides a unique perspective on how leaders can effectively engage with and lead DEIB change on a personal level. It highlights the necessity for leaders to understand their own biases and the dynamics of privilege and power within the organization and society. This contribution is particularly valuable as it addresses a gap in the literature regarding the personal transformation leaders must undergo to effectively champion DEIB efforts.
- 4) The study suggests that leadership training should include components on critical reflection, bias recognition, and managing the emotional dimensions of DEIB work, thus providing a roadmap for future curriculum development in leadership education.

5) The study candidly addresses the challenges and the often trial-and-error nature of DEIB implementation, adding the realities of organizational DEIB change to the conversation and calling for more research into effective strategies.

In conclusion, this study offers valuable insights that significantly contribute to the ongoing discourse surrounding DEIB organizational change and serves as a catalyst for further exploration and refinement of DEIB leadership practices that will better prepare leaders spearheading change in their organizations.

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**Appendix A - Study Invitation Email**

**Hi <Name>**,

As you may know, I am in a doctoral program and currently working on my dissertation. The working title of my dissertation is *Advancing Equity, Diversity, and Inclusion and Strengthening the Business Model: An Executive Team's Perspective*. I am interested in exploring the experiences of executives leading their organizations through change focused on diversity, equity, and inclusion. You each began the DEI work with a specific role in the company and your own values and views about how to best approach DEI. I am interested in learning more about how a team of diverse leaders come together to create and advance a shared purpose and goals for transformative DEI change.

I would like to interview the Executive Team and the Director of People and would appreciate the chance to interview you about your experiences and perspectives. There would be two interviews. The first would be held via zoom (or in person if you prefer), and the second interview would be in-person (and via zoom if not possible). Each interview should last no more than 60-minutes.

If you are willing to participate, please reply to this email and I will work around your availability to find a time for us to meet.

Thank you for your consideration,  
Tara L Cooper  
EdD Doctoral Candidate

### Appendix B - Informed Consent Form

**Project Title: Advancing Equity, Diversity, and Inclusion and Strengthening the Business Model: An Executive Team's Perspective**

You are invited to participate in a research study. The box below highlights the main information about this research for you to consider when deciding whether or not to join in the study. Carefully review the information and feel free to ask questions you may have prior to deciding whether to participate.

<b>Key Information for Your Consideration</b>
<ul style="list-style-type: none"> <li>● <b>Voluntary Consent.</b> You are being asked to volunteer for a research study. It is up to you whether you choose to take part or not. There is no penalty if you choose not to join in or decide to stop your involvement.</li> <li>● <b>Why is the study being done?</b> The purpose of the study is to explore the experiences of executive leadership team members engaged in organizational change focused on diversity, equity, and inclusion (DEI). The interviewer is interested in how participants perceive their experiences leading the work.</li> <li>● <b>How long will it take?</b> Your participation should last 60 minutes for each meeting, and you will be asked to meet twice over a three-six-week period.</li> <li>● <b>What will I be expected to do?</b> You will be asked questions about your experience or your perceptions of the DEI work within the organization. There are no right, wrong, or preferred answers. I am interested in each participant's unique perspective and views.</li> <li>● <b>Risks.</b> Some possible risks of taking part in this study include being uncomfortable during the interview due to feelings of vulnerability as you share your experience. I will work to minimize feelings of discomfort. Additional (though unlikely) risks include possible identification with your answers. I will work to minimize these risks by ensuring your interview recordings and transcripts are kept secure. Additionally, when I write about your experience, I will try to avoid providing details that would link back to or cast an obvious suspicion upon you. Pseudonyms will be used for participants in the write-up, and you will be able to choose your own pseudonym.</li> <li>● <b>Benefits.</b> A benefit of participating in this research is the ability to have your experience recorded and shared to potentially shape the expectations and support provided to other executive teams working to advance equity, diversity and inclusion in their business model and workplace.</li> <li>● <b>Participation is entirely voluntary.</b> Your decision to participate or not will not affect your relationship with the university or with me in any way. If you decide to takpart in this research, you may choose to withdraw at any time without penalty.</li> </ul>

**Process of Being Selected for Interviews**

You were selected for participation in this study because you are a member of the Executive team or an integral part of the company's equity, diversity and inclusion efforts.

**What happens to the information collected?**

Quotes from the interview will be used in a dissertation and may be used in further research on this topic for academic publication or presentations.

**How will my privacy and data be protected?**

We will take measures to protect your privacy including separating your personal information from your interview quotes and using pseudonyms when sharing your experiences. All interview transcripts, recordings, and related documents will be kept in secure password-protected electronic locations, and physical documents will be kept in locked locations. Quotes will be de-identified to ensure anonymity in data storage and in written publications.

Individuals and organizations that conduct or monitor this research may be permitted access to inspect research records, and this may include private information. These individuals and organizations include the Institutional Review Board that reviewed this research. Confidentiality will be maintained except when instances of elder, child, or sexual abuse are disclosed. As a mandatory reporter, I am obligated to report those instances. Despite taking steps to protect your privacy, we can never fully guarantee that your privacy will be protected.

**What if I want to stop my part in this research?**

Your part in this study is voluntary. You do not have to take part in this study, but if you do, you may stop at any time. You have the right to choose not to take part in any study activity or completely stop at any point without penalty or loss of benefits to which you are otherwise entitled. Your decision whether or not to join in will not affect your relationship with the researchers or Portland State University.

**Who can answer my questions about this research?**

If you have questions or concerns, contact Tara Cooper, at [taracooper222@gmail.com](mailto:taracooper222@gmail.com) or 916-501-6949 or her dissertation advisor (Principal Investigator), Chris Borgmeier at [cborgmei@pdx.edu](mailto:cborgmei@pdx.edu).

**Whom can I speak to about my rights as a part of research?**

The Portland State University Institutional Review Board ("IRB") is overseeing this research. The IRB is a group of people who independently review research studies to ensure the rights and welfare of participants are protected. The Office of Research Integrity is the office at Portland State University that supports the IRB. If you have questions about your rights or wish to speak with someone other than the research team, you may contact: the Office of Research Integrity

Phone: (503) 725-5484, Toll Free: 1 (877) 480-4400, Email: [hsrrc@pdx.edu](mailto:hsrrc@pdx.edu)

**Consent Statement**

I have had the opportunity to read and consider the information in this form. I have asked any questions necessary to decide to take part in the study. I understand that I can ask more questions at any time. I understand that each interview will take about 60 minutes of my time and that what I say will remain confidential meaning it will not be connected back to me in an identifiable way. I understand that the interview will be audio recorded and those recordings will be destroyed once the study is complete.

By signing below, I understand that I am volunteering to take part in this research. I understand that I am not waiving any legal rights. I have been provided with a copy of this consent form. I understand that if my ability to consent for myself changes, my legal representative or I may be asked to provide consent before I continue in the study.

I consent to join in this study.

---

**Name of Adult Participant**  
**Date**

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**Signature of Adult Participant**

**Researcher Signature** (to be completed at the time of informed consent)

I have explained the research to the participant and answered all of his/her questions. I believe that he/she understands the information described in this consent form and freely consents to participate.

---

**Name of Research Team Member**  
**Date**

---

**Signature of Research Team Member**

**Appendix C – First Round Interview Guide*****Introductory Questions***

Q1: How do you describe your personal identity?

Q2: How do you describe your role and tenure at the company?

Q3: In what ways, if any, do you feel your identity empowers you to help lead this DEIB work in the organization?

Q4: In what ways, if any, do you feel identity hinders you in helping to lead this DEIB work in the organization?

Q5: What are some of your feelings and thoughts about the work the company has done in the past two years to increase diversity and inclusivity in the company's culture?

Q6: In what ways, if any, has your position on the executive team affected your actions in this DEIB work?

Q7: In what ways, if any, has your personal identity affected your role within the executive team?

***Main Questions***

Q1: In the past year, have there been times when you felt confident being a part of advancing this work?

Q1a: If yes, in what ways did that manifest?

Q2: In the past year, have there been times when you did not feel confident being a part of advancing this work?

Q2a: If yes, in what ways did that manifest?

Q3: What's your "why"?

- Q3a: Why is deepening the DEIB work important to you?
- Q3b: Why now?
- Q4: Has your why changed or evolved in the past year, and if so how?
- Q5: Think back on the time when the company embarked on this deeper work:
- Q5a: What did you think deepening the DEIB work would be in practice?
- Q5b: What did you think your role would be?
- Q5c: What did you think would be the most challenging?
- Q5d: What did you think would be the most rewarding?
- Q6: After engaging in this work for a little over a year:
- Q6a: What has “deepening” the DEIB work been in practice?
- Q6b: What has been your role in deepening the DEIB work?
- Q6c: What have been the most challenging aspects of the DEIB work?
- Q6d: What have been the most rewarding aspects of the DEIB work?
- Q7: What aspects of the process took you to your “growth edge” (i.e., beyond just “challenging”)?
- Q8: Was there a time you wanted to back down from the changes or “throw in the towel”? If so, tell me about that experience:
- Q8a: What led up to it?
- Q8b: What made you not quit?
- Q8c: How was the situation ultimately resolved?
- Q9: Is there anything else you would like to add?

**Appendix D – Second Round Interview Questions**

Q1: After reflecting on the first round of interviews, did anything we talked about stand out to you? Any “ah has” or accomplishments or anything that you learned that really resonated and stuck with you after our time together?

Q2: In what ways has helping to lead the DEI efforts helped you to grow as a leader?

Q3: Can you describe some of the ways in which the CEO's engagement influenced and impacted your participation in the work?

Q4: Can you describe some of the ways in which the CEO's engagement influenced and impacted your participation in the work?

Q5: What advice would you give to other CEOs who want to lead a DEI change initiative?

Q6: What advice would you offer to other executive teams who want to lead a DEI change initiative?

Q7: Based on your experience, what do you think is the value of partnering with a DEI consultant for the work?

Q8: In what ways was participating in DEI coaching useful, if at all?

Q9: What could have made your experience working with a consultant better?

Q10: What have been the successes so far?

Q11: Do you feel like you still have a fear of saying the wrong thing or the “gotcha moment?”

Q12: Are there ways that doing this DEI work has helped you to grow on a personal level?

Q13: Having done this work with a team of people who sometimes had different experiences and opinions on topics being discussed, how important do you think it is for people to be able to freely express their views and experiences when they differ from what's popular or the majority view?

Q14: In what ways can team members' differing perspectives make the decision-making process? In what ways do they make it weaker?

Q15: If your colleagues didn't agree or they didn't understand where you were coming from, do you feel like in the conversations, they were respectful of your position?

Q16: Is there anything else you would like to add?



## Appendix E – Codes and Associated Themes

### Assumptions

- About role
- About work

### Benefits/Gains

- Business Gains
- Personal Gains
- Rewarding aspects of work

### Challenges

- Anticipated Challenges of the work
- Unanticipated Challenges of the work
- Emotional labor
- Challenging the status quo or group think
- Vulnerability

### Communication

- Team communication
- Full company communication

### Confidence

- High confidence
- Less confidence

### Critical Consciousness

- Self-Reflection
- Group-Reflection
- Self-Awareness
- Lack of Self-awareness

### Expectations

- Working with consultant
- Working with team
- Personal
- Professional

### Frustrations

- Personal
- Professional

### Hoped to learn/gain

- Personal
- Professional
- Solutions
- Imagery/Metaphors
- Influence of CEO
- Initial Beliefs

### Lessons Learned

#### Meetings

- Time

#### Meetings

- Time
- Frustrations

#### Mindset

- Binary Mindset
- Growth Mindset
- Shifts in Mindset
- Shifts in Approach

#### Motivation

- Intrinsic
- Extrinsic

#### Partnering with Consultant

- Benefits
- Normalizing the work
- Coaching
- Meeting Facilitation

#### Positionality

- Self-Identity
- Standpoint
- Power Differentials
- Awareness of others' identity
- Capacity for Understanding Other
- Dominant Culture Norms
- Hierarchy

#### Reality of their role

#### Reality of the work

#### Recommendations/Advice

#### Reservations

#### Unorthodox

- Emotional Discomfort/dis-ease
- Leadership Approach
- Slowing down decision making

#### Why

- Why the work is important
- Personal Why