

# The Research Foundations for *REAL*

*A Framework for Leadership Action in  
Equity, Diversity & Inclusion*

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# Executive Summary

Organizational cultures that emphasize fairness, connection and human-centeredness inspire more effective collaboration, are more economically efficient, and can manage conflict and crisis effectively.<sup>1</sup> Such cultures are also marked by less burnout and more engagement, retention, and satisfaction.<sup>2</sup> These cultural values directly relate to promoting equity, diversity, and inclusion (EDI) in the workplace. Despite these well-known values, leaders do not always know how to talk about them or make them tangible and practical. [REAL](#) is a research informed framework crafted carefully to do exactly that: help leaders make culture change real to the people on their teams. *REAL* provides the necessary foundation to generate effective EDI solutions that capture real effects and challenges people face. The current paper describes the *REAL* framework, the research underpinning its core tenets, and insights for leaders committed to building more equitable, diverse, and inclusive organizational cultures. The elements of the framework are:

- **Reveal relevant opportunities** by exploring your organization as a complex system, identifying strategic actions for change, and being clear that goals may be hard to achieve.
- **Elevate equity** as foundational to diversity and inclusion efforts because it provides fair opportunities for all to reach full potential.
- **Activate diversity** strategically by embracing stakeholders' vast reservoir of perspectives and experiences, ultimately enhancing innovation and decision-making.
- **Lead inclusively** by nurturing connection, vulnerability, courage, and investment in initiatives to build respect a sense of significance for every stakeholder.



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# Introduction

At the Center for Creative Leadership (CCL), we are a leading force in leadership because we use frameworks to guide complex decision-making and strategy. Over 50 years of dedication to our mission taught us that evidence-based models are more reliable than intuition alone, especially for highly nuanced issues pertaining to equity, diversity, and inclusion (EDI). We created the *REAL*<sup>™</sup> framework to inform our EDI solutions at CCL and help leaders move from ideas to action.<sup>3</sup> The *REAL* framework is grounded in our mission: to advance the understanding, practice, and development of leadership for the benefit of society worldwide.

With societal inequities under a spotlight, incorporating EDI into organizational culture and strategic planning is critical for leaders to make meaningful progress that serves systemically excluded groups rather than simply providing cosmetic solutions.<sup>4</sup> Today's leaders have an opportunity and responsibility to reshape systems using research-informed frameworks that address the concerns and experiences of those who have been historically undervalued and underestimated. As such, *REAL* is intended to bring innovation through varied perspectives and experiences, mitigate the risks of groupthink, and help organizations relate to and communicate effectively with broader stakeholders.

The research is clear: diversity (proportionate representation across all dimensions of human difference) and inclusion (ensuring leaders at all levels are visible, heard, and considered) are important to leadership development and organizational change.<sup>5,6</sup> But pursuing them in isolation only provides partial solutions.<sup>7,8</sup> The missing link is equity - ensuring everyone has the appropriate support and resources to reach their full potential, based on their circumstances. Without elevating equity, even the most diverse organizations can fall short. Well-intentioned efforts become “window dressing” rather than roadmaps for real commitment. Our studies show how structural barriers prevent leaders at all levels from being fully engaged and empowered, even in diverse settings.<sup>9</sup> Equity spotlights where organizational practices and policies need work to sustainably cultivate leadership potential at all levels. For instance, an organization may recruit diverse talent but lack mentoring to nurture emerging leaders' growth. Flexible work arrangements that accommodate caregiving needs often remain reserved for senior roles. Moving equity to the forefront corrects for such gaps so organizations can live up to their diversity and inclusion goals and commitments, unlock every person's abilities, and create workplaces where all contribute and prosper.<sup>10</sup>





EDI is critical to leadership development for three additional reasons. First, thriving economies and societies require it. Patterns of demographic shifts, international migration, and systemic inequities that produce health, income, and other disparities will only continue to present global challenges for organizations to solve.<sup>11</sup> For instance, by 2050, it is predicted that 40% of all children worldwide will reside in Africa, and by 2100, this continent will be home to 39% of the global adult population.<sup>12</sup> Meanwhile, the US is diversifying even faster than predicted.<sup>13</sup> These demographic shifts underscore the importance of understanding and embracing an array of cultures and perspectives in leadership. Leaders will need to understand intercultural concerns and leverage resources to create opportunities for all stakeholders to thrive. Further, challenges of mass migration and displacement from places like Syria, Somalia, Ukraine, Venezuela, Gaza, and Myanmar, are making leaders face complex issues that span healthcare, politics, ethnicity, and religion. Leaders shoulder the responsibility of reshaping systems using frameworks informed by research that address present problems and help them prepare for the future. Along with these patterns of change is the challenge of underpopulation in many Western and East Asian nations, which is leading to new economic models that prioritize population stability and sustainable energy consumption.<sup>14</sup> These impending global shifts are perceived differently by different social groups. Some may view these changes as the dawn of a new era - the demise of empires, patriarchal systems, fossil fuel reliance, poverty, and human domination over nature. However, for others, these changes are sources of fear and insecurity. Their long-

held assets – be they physical, such as oil refineries, psychological, like gender dominance, or cultural, as in the supremacy of empires – are all in flux. This flux can lead to defensive reactions because it seems difficult to find stable ground. Feelings of powerlessness, vulnerability, and disorientation can emerge. EDI centers ways of thinking and leading that prioritize dealing with these systemic changes and sentiments in real time.

Second, our volatile, uncertain, complex, and ambiguous world makes EDI an intrapersonal, interpersonal, group, organizational, and societal necessity.<sup>15</sup> This is increasingly evident, for example, when we consider the impact of the COVID-19 pandemic and changing global power dynamics. We are already witnessing a significant shift as the world moves from a predominantly American-centric focus to one that recognizes the growing influence of China and other Asian nations.<sup>16</sup> As with the patterns noted above, this shift will inevitably reshape global hierarchies of knowledge and power, requiring leaders to be adept at intercultural communication, public diplomacy, and social change. Leaders cannot rely solely on past patterns to guide decision-making in today's increasingly complex and diverse world, which demands new evidence-based approaches. Leaders who cling only to what worked before risk perpetuating biases and missing opportunities to leverage new, diverse perspectives and innovative thinking. Rather, leaders need to incorporate recently developed ways of thinking, acting, and influencing to meet systemic inequities in real time.<sup>17</sup>

Finally, EDI is a human-centered perspective on problem-solving, which is increasingly valuable as

the world seeks alternatives on problem-solving and EDI informed by artificial intelligence. As clear EDI-metrics based on available research are implemented and improved we will better recognize the benefits of EDI for decision-making, collaboration, and economic and emotional responsiveness in an era increasingly characterized by impersonal interaction and the rise of artificial intelligence.<sup>18</sup> Take the *Gender Shades Project* as an example.<sup>19</sup> This groundbreaking study revealed commercial artificial intelligence systems had higher error rates in classifying gender for darker-skinned and female faces. This work underscores the importance of diversity in considering a broader range of variables and was recently extended to include even more comprehensions of skin color, leading to more inclusive and equitable outcomes.<sup>20</sup> The lesson is twofold: (1) When artificial intelligence is trained on data that reflects existing biases, these systems will perpetuate existing biases.<sup>21</sup> And, (2) by integrating EDI into our information systems, we can humanize interactions and ensure our technologies serve all members of society equitably and effectively.<sup>22</sup>

Getting real about EDI means acknowledging its benefits and the challenges to be faced along the way, including anticipating backlash, navigating economic pessimism, correcting algorithmic bias, and facing systemic oppression.<sup>23</sup> *REAL* is “real” because it is based on decades of CCL’s research in leadership as a social practice that enables individuals to work together to achieve results they could never achieve working alone. Our work in *Boundary Spanning Leadership* demonstrates how leveraging demographic boundaries can lead to transformation and innovation when dealing with resistance.<sup>24</sup> Our work on “the glass ceiling” asserts that purposeful, systemic action to eliminate gender bias in leadership advancement is both ethically necessary and an economic imperative when utilized.<sup>25</sup> Our work on *Leading Across Differences* takes a systemic approach to equipping leaders to understand differences and nurture the potential of diverse teams and organizations by focusing on skill-building around self-awareness, diagnosing biases, and leading change across cultures and identities in the face of systemic oppression.<sup>26</sup> And, our work in *Lessons on Experience* explains that hard won lessons from facing hardships and dealing with bosses and colleagues everyday -- not

solely formal education -- profoundly shape a leader’s growth and provide optimal development pathways.<sup>27</sup>

Because leadership happens in the interactions and exchanges among people with shared work, the four components of *REAL* – revealing relevant opportunities, elevating equity, activating diversity, and leading inclusively – are not predetermined stages through which an individual leader must pass. Rather, they are complementary lenses through which leaders expand human potential and work with their teams and organizations to create better futures. *REAL* provides opportunities to align principles, seek understanding, and work compassionately while engaging diverse viewpoints to find solutions. Focusing on each *REAL* component in its uniqueness and its interconnectedness to other components provides the fullest understanding of the value the framework adds and makes space for challenges to be faced by people doing the work at all leader levels, thus capturing the reality of EDI’s effects.<sup>28</sup> It also helps to make change possible, giving leaders a new lens through which to see the world and a set of evidence-informed strategies for enacting sustainable change.

In the pages that follow, we provide an in-depth exploration of the research underpinnings of each part of the *REAL* framework. Specifically, we share why this framework can move leaders from merely having EDI aspirations to creating impactful, sustainable actions tailored to their organizations’ evolving needs.



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# Understanding The *REAL* Framework

Existing EDI frameworks have made valuable contributions to organizational change and leadership development, but many lack the evidence-based and actionable steps today's leaders need to drive meaningful progress. The *REAL* framework was born from the need for an integrated way to interrogate and integrate personal and organizational values that is grounded in research. The impetus for creating *REAL* was the growing call from organizations for tangible EDI solutions. While global polycrises intensify demands for equity, leaders express frustration at platitudes devoid of evidence. *REAL* meets leaders where they are – in the real world – synthesizing research into an actionable compass.

*REAL* shows leaders how to reveal relevant opportunities, elevate equity, activate diversity, and lead inclusively. With clear direction anchored in social science, leaders gain confidence to have crucial conversations and courage to do things differently. Moreover, *REAL*'s research-based approach helps leaders avoid missteps and superficial solutions. Our evidence-grounded framework illuminates opportunities for growth while providing guardrails to implement EDI in ways that truly serve leaders and their organizations. By pairing rigor with pragmatism, *REAL* is tied to what leaders and leadership can actually do — propel individuals, teams, and organizations from good intentions to outcomes that matter.

CCL's *REAL* Framework draws from many disciplines including organizational psychology and communication, sociology, law, and management. There are three reasons for this interdisciplinary approach:

- First, addressing complex issues stemming from the pursuits of equity, diversity, and inclusion benefits from varied academic lenses. Because research from each field provides valuable yet incomplete insights, a multidisciplinary approach counters blind spots and disciplinary biases and allows for a more holistic understanding.
- Second, examining a problem through multiple research paradigms provides stronger evidentiary support via triangulation of findings. Consistent insights and findings across disciplines increase confidence in the rigor and relevance of the knowledge generated.
- Finally, real-world leadership itself is multidisciplinary as it requires navigating social, cognitive, structural, rhetorical, and ethical dimensions. Multidisciplinary research mirrors this complexity and equips leaders with a well-rounded toolkit that is more relevant and impactful.

After a thorough review of the literature and reflection on our own decades-long experience designing leadership solutions, we created a framework based in **Appreciative Inquiry** to help leaders better understand what it takes to generate effective EDI solutions, put equity first, and have a realistic understanding of challenges to be addressed and overcome. Leaders need EDI models that foster generative thinking versus deficit-focused approaches. Appreciative Inquiry offers a unique lens largely absent from current frameworks, which emphasize problems to fix over uncovering opportunities for development.

*Appreciative Inquiry: The Other AI.* At its core, the *REAL* Framework is grounded in Appreciative Inquiry, which explains that an organization's culture is shaped by the collective beliefs, values, and ideals of its employees.<sup>29</sup> Growing out of management theory, Appreciative Inquiry also suggests that collective imagination or envisioning “what could be” allows organizations to move towards positive outcomes and revelations that were previously unseen.<sup>30</sup> Appreciative Inquiry does not imply glossing over challenges or focusing only on positive aspects of culture. Instead, the method uncovers what existing beliefs, values, and outcomes about EDI can propel an organization it toward an ideal state. Further, Appreciative Inquiry undergirds *REAL* in terms of the generative questions<sup>31</sup> it compels leaders to ask and answer:

- How might we *reveal opportunities* others miss (by considering who, what is being left out of traditional EDI paradigms, programs)?
- How might we *elevate equity* (by focusing on all who benefit when EDI efforts succeed)?
- How might we *activate diversity* that already exists (by casting a wide net with a sharp focus)?



- How might we *lead inclusively* (by repurposing leadership challenges to our advantage)?

Asking and answering these questions helps individuals, teams, and organizations envision the goals they wish to achieve and build on existing strengths. For instance, envisioning goals might involve:

- Setting a specific goal to achieve gender parity in leadership roles within a certain timeframe, thereby addressing a long-standing gender imbalance.
- Defining clear objectives for inclusive hiring practices, such as actively recruiting candidates from underrepresented backgrounds to create a more diverse workforce.
- Establishing measurable outcomes for cultural competence training programs to ensure that all employees are equipped with the knowledge and skills needed to foster an inclusive environment.
- Creating and nurturing Employee Resource Groups with quantifiable goals, such as increasing membership and engagement among employees from different backgrounds.
- And, developing strategies and targets for mitigating unconscious bias in decision-making processes, ensuring fair and equitable treatment for all employees.

In this way, by setting concrete goals EDI initiatives become not just aspirational ideals but actionable steps toward fostering a more inclusive and equitable workplace ecosystem.

Envisioning goals is particularly important for EDI work, which is based on seeing the workplace as an emergent **ecosystem** comprised of people whose interconnections and interactions create structures and norms that often go unnoticed. Within an ecosystem, successful EDI efforts are embodied by **value prerequisites**<sup>1</sup> that fuel “long-term commitment [and require] constant re-evaluation.”<sup>32</sup> Appreciative Inquiry provides a foundation for generative adaptation to an organization’s evolving needs and makes space for unexpected outcomes to come out of everyday individual interventions and interactions. In this way, Appreciative Inquiry supports the process of doing EDI work rather than indifferent adherence to goals for the sake of ‘checking a box.’

A focus on mobilizing individual and organizational strengths makes a natural fit for elevating EDI. Appreciative Inquiry starts by identifying core beliefs and values through storytelling and asks positive questions that reveal strengths, not just problems. This empowers systemically excluded voices to share experiences and envision an inclusive future grounded in their assets and talents. Rather than a deficit lens, Appreciative Inquiry takes a generative approach to co-construct EDI goals aligned with people’s values. This motivates change agents and builds coalition across differences. With diverse groups collaborating towards shared EDI visions rooted in

<sup>1</sup> Value prerequisites is a phrase coined by CCL that defines courage, hope, and empathy as the essential principles or standards a society, organization, group, and individual must connect with and uphold to implement EDI. For more information please see: Beach A. A., & Segars, A. H. (2022, June 7). How a values-based approach advances DEI. MIT Sloan Management Review. <https://sloanreview.mit.edu/article/how-a-values-based-approach-advances-dei/>

their collective purpose, Appreciative Inquiry builds high engagement to turn plans into action. When efforts align with people’s deepest values, momentum is easier to sustain. As a foundation, Appreciative Inquiry offers tools to unearth strengths, bridge divides, and energize systemic EDI change that sticks. By affirming the talent embedded in the experiences and educations of systemically excluded people, Appreciative Inquiry guides leaders to equitable and lasting outcomes.

Without this foundation, an organization’s existing culture and beliefs may limit the creation of new ideas. Because of its grounding in Appreciative Inquiry, applying the *REAL* framework in a leadership development setting both generates ideas and envisions freeing structures that can lead to innovation and transformation. To this end, our framework focuses on four areas through which leaders can engage EDI:

- **Reveal relevant opportunities** by exploring your organization as a complex system, identifying strategic actions for change, and being clear that goals may be hard to achieve.
- **Elevate equity** as foundational to diversity and inclusion efforts because it provides fair opportunities for all to reach full potential.
- **Activate diversity** strategically by embracing stakeholders’ vast reservoir of perspectives and experiences, ultimately enhancing innovation and decision-making.
- **Lead inclusively** by nurturing connection, vulnerability, courage, and investment in initiatives to build respect a sense of significance for every stakeholder.

**REAL FRAMEWORK FOCUS AREAS, ACTIONS**

Focus Area	Individual Actions	Group Actions	Organizational Actions
Reveal relevant opportunities	<ul style="list-style-type: none"> <li>▪ Invite to storytelling</li> <li>▪ Acknowledge power dynamics</li> <li>▪ Allow anonymity</li> </ul>	<ul style="list-style-type: none"> <li>▪ Build psychological safety</li> <li>▪ Express dignity</li> <li>▪ Engage dialogue</li> </ul>	<ul style="list-style-type: none"> <li>▪ Experience diverse perspectives</li> <li>▪ Build culture of respect</li> <li>▪ Achieve collective commitment</li> </ul>
Elevate equity	<ul style="list-style-type: none"> <li>▪ Address inequitable resources</li> <li>▪ Develop self-efficacy</li> <li>▪ Express employee voice</li> </ul>	<ul style="list-style-type: none"> <li>▪ Collaborate</li> <li>▪ Uphold justice</li> <li>▪ Share power</li> </ul>	<ul style="list-style-type: none"> <li>▪ Increase representation</li> <li>▪ Prioritize retention</li> <li>▪ Review policies and procedures</li> </ul>
Activate diversity	<ul style="list-style-type: none"> <li>▪ Celebrate differences</li> <li>▪ Express individuality</li> <li>▪ Practice open-mindedness</li> </ul>	<ul style="list-style-type: none"> <li>▪ Embrace new ideas</li> <li>▪ Cultivate empathy</li> <li>▪ Create team spirit</li> </ul>	<ul style="list-style-type: none"> <li>▪ Find outliers</li> <li>▪ Build HR brand</li> <li>▪ Revitalize organizational culture</li> </ul>
Lead inclusively	<ul style="list-style-type: none"> <li>▪ Value sincerity<sup>33</sup></li> <li>▪ Promote relationship building</li> <li>▪ Invest time in people</li> </ul>	<ul style="list-style-type: none"> <li>▪ Value debate</li> <li>▪ Connect strategically</li> <li>▪ Foster courage</li> </ul>	<ul style="list-style-type: none"> <li>▪ Improve collaboration</li> <li>▪ Resist silos</li> <li>▪ Invest in difference</li> </ul>

**TABLE 1**

Each of these areas (and the actions they entail) is vital to preventing or reducing bias, projection, denial, and other conditions that can lead to myopia, misinterpretation, and limited worldviews.<sup>34</sup> Taken together, the four elements of *REAL* help leaders resist sharp, binary perspectives, maintain conditions of interdependence, and have conversations that do not essentialize cultures or experiences. The application of the *REAL* framework in a leadership development

setting generates ideas and “liberating structures”<sup>35</sup> that lead to innovation. *REAL* helps people see where/when their values, beliefs, and actions are (mis)aligned with organizational systems and structures.<sup>36</sup> Gaps in alignment can become critical points of intervention for leadership development solutions.<sup>37</sup> People find motivation to change when they discover how their potential biases are misaligned with their personal and organizational values.<sup>38</sup>



## Getting To *REAL* Questions And Answers

*REAL* allows leaders to explore a comprehensive and holistic approach to EDI and offers a helpful way to consider everyday practices in bringing their values and efforts to life. Grounded in social science, its four components offer a versatile framework designed for any leader at any level to apply. While *REAL* offers guardrails, its components flex to resonate across contexts to build self-efficacy and scaffold change. At any level, leaders can utilize *REAL* to drive equity and inclusion by confronting biases, making priorities, enhancing strengths, and asking key questions. The remainder of this section will discuss how.

**Reveal relevant opportunities.** Revealing relevant opportunities uses Appreciative Inquiry to uncover and address complex problems we have not solved before. It assumes every stakeholder has personal responsibility to support their EDI culture, not just Human Resources or the EDI Team. Responsibility is enacted by posing questions such as:

- How is diversity represented in this organization?
- What unchecked biases impact individuals, teams, and systems?
- What stories, rites, and rituals are used to explain organizational culture?<sup>39,40</sup>

Answering these questions is an emergent process

aimed at understanding and dissecting existing conditions in the form of facts, data, and history from local, national, and global perspectives.<sup>41</sup> Answers require having a full picture of the present day, allowing for more opportunities to envision a way forward. Finding a way forward can be challenging, as biases can get in the way.<sup>42</sup> Creating possibilities requires a shift in thinking: adopting a curious, deliberative mindset is necessary for the ongoing, iterative nature of EDI work within organizations.<sup>43</sup> This shift in thinking is reflected in rhetorical shifts.<sup>2</sup> For instance, rather than saying “our organization is x” leaders say, “our organization is on a journey.” Such rhetorical shifts create contexts within which senior leaders model and accept a path of continuous development through storytelling.<sup>44</sup> Going on “an EDI journey” involves creating a vision of what the organization could be while acknowledging and working to eliminate personal and structural biases.<sup>45</sup>

Primary among these unexamined biases is **correspondence bias**: the fact that people often draw conclusions about one another based on behavior that could be explained entirely by the situations in which behaviors occur.<sup>46</sup> One type of correspondence bias is evidenced in some accusations of “virtue signaling.”<sup>47</sup> For example, if a team member is frustrated with lack of perceived EDI progress in their organization, it is easy to assume the cause is a senior

<sup>2</sup> While critiques of growth mindset exist (i.e., oversimplification, overemphasis on individuality, lack of empirical support for causality), Dweck’s concept of a growth mindset has also been widely embraced and applied in various educational and organizational settings. Many educators and psychologists find value in promoting a belief in the malleability of abilities and the idea that effort and learning can lead to improvement. Researchers continue to explore and refine the concept, addressing some of the criticisms while building on its core principles.

leader who wants to appear committed but is not. However, it is possible that the senior leader may care deeply about EDI issues and is hesitating over fear of doing the wrong thing, or they may be limited by their own experience and mindset. The senior leader may be fighting behind the scenes for progress and slowed by factors other stakeholders do not recognize (e.g., local laws, red tape, cultural resistance, lack of funding). Consequently, senior leaders must ensure their teams know and understand they are taking action, even if it is slow-going, once team concerns are raised.<sup>48</sup> If not, correspondence bias prevails, forestalls progress, and impacts team trust and efficacy. Correspondence bias stems from our tendency to fail to consider others' situations and contexts—instead focusing on how others' behaviors impact us. This bias can limit our ability to see and notice where the true opportunities for change reside. Given the emergent nature of culture change, a narrow view at the start – one hindered by unexamined biases – can drastically limit future progress.

Revealing relevant opportunities responds to correspondence bias and virtue signaling by inviting individuals to consider new perspectives, ask questions, and uncover what may be hidden. One way to facilitate this is through cultivating a **process of deliberate creation**.<sup>49</sup> Studies in psychology and communication show people who take time out to think deeply exhibit less prejudice, rely less on media stereotyping, consider the importance of context in decision-making, and create more desirable results.<sup>50,51</sup> When applied to EDI work, a process of deliberate creation can also help leaders speak differently. Thinking and speaking differently about EDI helps organizational cultures move past stagnant labels (e.g., “marginalized”) and find ways to enhance each team member’s ability to learn, develop, and perform.<sup>52</sup> Taking time to pause and think deeply allows individuals to make space for personal improvement and organizational growth through moment-to-moment actions, thoughts, feelings, and behaviors.

It is important to articulate relevant opportunities as they are revealed. Therefore, we challenge leaders to reflect on impact rather than intent. Concentrating on impact rather than intent means focusing on how a person’s actions or inactions may be rooted in or result in bias or discrimination—irrespective of whether the person is willing to take responsibility for their biases or acts of discrimination. Impact-focused approaches to EDI work stem from a **discrepancy strategy**. Research in social psychology shows that making individuals aware of how their potential biases are divergent from their values and the standards of the organization can be a catalyst towards change.<sup>53</sup> Discrepancy strategy assumes that people are generally motivated to behave in positive, socially desirable ways. Therefore, revealing when personal actions or organizational policies do not align with goals and values encourages leaders to find ways to align their values and efforts. Ultimately, the goals of revealing relevant opportunities are to help individuals approach EDI issues openly and without judgment and find opportunities for concrete and sincere change.

## CLIENT EXAMPLE

### REVEALING RELEVANT OPPORTUNITIES IN ACTION

At St. Mark’s Medical Center, a longstanding gap in understanding task performance and, therefore, in communication and collaboration, separated doctors from administrators. Dr. Sarah Mitchell proposed a “Spanning Boundaries” program to bridge this divide. Doctors took on administrative tasks, and administrators shadowed doctors. Over time, they gained insights into each other’s roles and challenges. As a result, collaboration blossomed. They devised innovative solutions, improving patient care and the hospital’s financial health. The program wasn’t just about boundaries; it was a cultural shift. Doctors and administrators learned to collaborate and communicate, turning the hospital into a place where unity and understanding prevailed. The power of working together had transformed St. Mark’s Medical Center for the better.

**Elevate Equity.** As stated above, equity refers to fair and contextually appropriate access to the resources and opportunities required for every individual, group, organization, and community to attain their full potential. Diversity and inclusion efforts that do not foreground equity often fail to have a lasting positive impact, and in some cases even do damage.<sup>54,55</sup> Such initiatives focus on hiring people from systemically excluded groups and requiring them to participate in the existing organizational initiatives and culture without fully considering what they *want and need* to thrive. People enter the world of work and advance through their careers with unevenness of advantage, opportunity, privilege, and power. An equity-driven approach to EDI work invites leaders to explore what “full potential” may look like, what inequities must be addressed to overcome barriers to realizing full potential, and what restraining and driving forces may not be explicit.<sup>56</sup> Leaders ready to elevate equity in their organizations ask questions, including:

- Who does not have power and why?
- Who has power and why?
- How can those with power avoid reproducing inequities?<sup>57</sup>

Answering these questions requires reimagining existing structures (e.g., policies, workplace cultures, behaviors, norms) to generate new possibilities. Elevating equity involves understanding how individuals and organizations are inextricably linked to broader economic and social systems that may benefit them in critical ways. Research in positive psychology shows that when the voices of privileged or over-represented leaders prevail, it is impossible for a team to operate on equal terms. Addressing inequities requires fully considering what systemically excluded people *want and need* to thrive and lead, rather than assimilate, within a given organization. On the micro level, an *equity* approach to onboarding would be to ensure that each new employee had a copy of the handbook they could read and understand. Doing this requires a discussion about employees’ needs and expectations, as well as having multiple versions of the handbook available (e.g., a hard copy for people who don’t have access to a computer, copies in different languages, an audio version for individuals who may have trouble processing visual text). Taking this approach to the macro level, CCL research on emerging leaders revealed young people are keenly aware of inequitable opportunities, desire greater involvement in leadership, and are vocal about



the importance of empowered versus performative equity.<sup>58</sup>

Answering these questions also signals an ongoing commitment that becomes the foundation of an organization's EDI efforts.<sup>59</sup> Without this commitment, efforts to promote diversity and inclusion may be laudable but not impactful.<sup>60</sup> For example, a study examining systemically excluded people (i.e., people who identify as women, people minoritized on the bases of race and ethnicity, and LGBTQ+ people) found nearly 75% of participants did not feel they personally benefited from their companies' diversity and inclusion programs.<sup>61</sup> Such trainings use "quick fix" approaches that ignore systemic issues and fail to accurately account for "how bias is actually experienced in the real world, where individuals are not the targets of prejudice once, or twice, or three times, but experience it continuously over weeks, months, years" and lifetimes.<sup>62</sup> As a result, inequitable policies and cultural norms go unchallenged and create recruitment and retention challenges. Recruitment and retention challenges are usually mislabeled "pipeline problems," which stem from a lack of equity built into hiring and retention processes generally. Elevating equity gives leaders better questions to ask so they can tackle existing problems and create new solutions.

Ultimately, elevating equity requires leaders to collect, understand, and think critically about employee engagement data to diagnose issues and track progress.<sup>63</sup> Representation data is particularly powerful for unearthing inequities because it can be interpreted to paint a systemic picture that can be continuously measured to assess improvement. In recent years, many companies have made strides towards addressing systemic issues by adopting policies for long-term flexible work hours,

## CLIENT EXAMPLE

### ELEVATING EQUITY IN ACTION

Deborah had been with her company for 15 years, but she couldn't ignore the glaring inequity in her role. While she made cold calls, her colleagues got clients with existing relationships. Eventually, she discovered she was earning only 60% of what her peers made.

Frustrated, Deborah approached her boss, who promised to address the issue but never did. She decided to escalate the matter to HR and senior management. After an internal review, the company acknowledged pay disparities, rectified them, and implemented fair compensation policies. Deborah's courage led to positive change, promoting fairness and transparency for all employees.

opportunities for telework, and increased parental leave. In fact, recent work shows that most emerging leaders prefer the ability to work from home or have flexible work time.<sup>64</sup> Opportunities such as remote and hybrid work can enhance EDI culture change. For instance, people who identify as women, who often bear the brunt of caregiving responsibilities, can maintain a work life balance which improves performance and overall psychological wellness.<sup>65</sup> Additionally, remote work can lower the frequency of microaggressions encountered by systemically excluded people.<sup>66</sup> However, despite the potential benefits, biases can also arise in new ways of working that warrant examination. Research shows historically marginalized groups may feel more included with cameras off, yet some leaders harbor "unchecked biases"<sup>67</sup> about the need to be on camera.<sup>68</sup> Exploring issues like virtual presentation, unstated norms, and double standards around flexibility merits discussion to uncover potential blind spots as work evolves.<sup>69</sup> While arrangements like remote and hybrid work hold promise, a critical equity lens is key to illuminate where new biases emerge so they can be proactively documented and addressed.



**Activate Diversity.** Activating diversity is a process of acknowledging, celebrating, and catalyzing differences within a given organization or work group (e.g., teams, employees, customer base). As a strength-based intervention, activating diversity eschews treating historically excluded groups as problems to be solved. Instead, activating diversity means highlighting the assets each unique individual brings. When leaders activate diversity, they build safety and connection and unlock potentials at all organizational levels. Stakeholders feel valued for their unique contributions, not just included for representation's sake.<sup>70</sup> Studies in psychology reveal that consistent strength-based messaging improves performance, wellbeing, engagement, and other long-term outcomes for systemically excluded groups.<sup>71</sup> Leaders who consistently message the strengths of diversity activate their teams' full potentials while building group cohesion and organizational culture. Leaders interested in activating diversity see the unique perspectives and needs of individuals with diverse identities and work toward providing mentorship, resources, and opportunities that are tailored to unique experiences. When leaders activate diversity, they ask:

- What if we do something different than others do to broaden our candidate pool?
- How do we diversify in a climate grounded in tradition and skepticism of social change?
- How can we create an environment where people can sincerely be themselves?<sup>72</sup>

When answering these questions, it is important to consider the sociological concept of **social identity theory**<sup>73</sup> and the role of **intersectionality** per critical legal studies.<sup>74</sup> Social identity theory offers valuable insights into how individuals perceive themselves and others within the broader social context. It is a lens through which we can better understand the complexities of human behavior, especially in the age of hybrid work and general-purpose technologies, when our identities are increasingly intertwined with online global communities and platforms. At its core, social identity theory suggests people tend to categorize themselves and others into various social groups. These groups can be based on factors such as race, gender, sexual orientation, religion, nationality, disability, or even shared interests and affiliations. These group memberships contribute to our sense of identity and self-worth.

Further, social identity theory sheds light on the dynamics of in-groups and out-groups. We often develop a strong sense of belonging and loyalty to our in-group, while potentially perceiving members of out-groups as different or even threatening.<sup>75</sup> This phenomenon can have significant implications in terms of leadership development and organizational change, as it can lead to polarization, echo chambers, missed opportunities, and increased conflict.<sup>76</sup> Issues to consider include:

- How do social identities play out as social, cultural (and even technological) landscapes evolve?
- How do we shape the perceptions of and interactions with our social identities as leaders?<sup>77</sup>
- And, how we might harness the positive aspects of diversity and collaboration while mitigating the risks of polarization and division?<sup>78</sup>

In essence, social identity theory serves as an important way of understanding the intricate dance

between our individual identities and the collective identities we form in organizations as leaders.<sup>79</sup>

Because our social identities are always negotiated – across time, contexts, and other factors – intersectionality helps us understand the resulting interconnected systems of privilege and oppression we encounter.<sup>80</sup> Just as organizations are influenced by intersecting social and cultural forces, our personal leadership journeys are deeply influenced by our intersecting identities. Consider a leader who identifies as a Baby Boomer and as an LGBTQ+ individual. This person may encounter intersections of age and technology. Their leadership journey could involve adapting to new digital tools and communication methods while navigating generational gaps in the workplace, all while being mindful of their LGBTQ+ identity and its impact on their interactions with colleagues. Or, consider a leader with a disability who also identifies as a person of color. This person may find their leadership journey is deeply influenced by their dual identities. They may become a vocal advocate for both disability rights and racial equity, working to create a more inclusive workplace that recognizes and values diversity in all its forms. Such diversity of experiences can be a source of strength and innovation. Research tells us leadership is not one-size-fits-all. Effective leaders recognize and leverage their own intersectional identities, as well as those of their team members, to create inclusive and equitable environments. Doing so requires a commitment to understanding and addressing the specific challenges faced by individuals at various intersections of identity.

Leaders and organizations need to be aware of and willing to ask these questions. Activating diversity is not merely a theoretical concept; it is a practical tool for creating more equitable and effective leadership in today's complex and diverse world. By recognizing and activating the intersecting identities of leaders and aspiring leaders, we can understand and address challenges like biased hiring practices, pay disparities, and the rewarding of emotional labor. As we activate diversity we create organizational climates that truly reflect the rich tapestry of human experiences and are more capable of addressing the complex challenges inherent in systems of privilege and oppression.

## CLIENT EXAMPLE

### ACTIVATING DIVERSITY IN ACTION

In a telecommunications company, Juan, a Latino employee, noticed language barriers affecting Latino customers. He suggested Hispanic customer service centers but faced initial resistance from the head of marketing. After five years, a pilot center proved successful. As more bilingual employees joined, these centers became highly profitable. The company's shift toward activating diversity not only bridged a service gap but also tapped into an underserved market, showcasing the value of diversity in business. Juan's persistence and vision paid off, benefiting both the company and the Latino community.

**Lead Inclusively.** Inclusive leaders must acknowledge differences while building unity. They work intentionally to support meaningful and authentic participation of and investment in every individual in a group, organization, or society. True inclusion does not rely on team members to learn how to blend in with a given organizational culture. Rather, inclusion requires a climate where every individual feels unique, respected, recognized, and connected to the group. Inclusion involves policies and practices, but also the ability to envision and enact new ways of leading. Examples of leadership behaviors that can facilitate inclusion are supporting individuals as full members of the group by prioritizing everyone’s voice and perspective, ensuring justice and equity within the group by recognizing power structures and imbalances, sharing decision-making power and processes through transparency, and encouraging diverse contributions.<sup>81</sup> Consequently, questions inclusive leaders ask include:

- How can I ensure every team member brings their insights and experiences to bear on solving emergent problems? What opportunities can I explore?
- What obstacles or concerns might be hindering open communication?
- How can we ensure our decision-making processes are fair and equitable?

Asking and answering these questions is one way to avoid “fault lines” and lead inclusively by example.<sup>82</sup> By doing so, leaders create environments where employees feel valued, heard, and empowered to contribute to the organization’s diversity and inclusion efforts. They enable open dialogue, collaboration, and the collective pursuit of a more equitable organization, ultimately leading to improved innovation,

performance, retention, and employee wellbeing.

But there is more. An underlying requirement for inclusive leadership is **trust**. Trust refers to the belief that individuals and groups within an organization can rely on each other and be treated fairly and with respect, regardless of their background, identity, or status. Trust is the bedrock upon which meaningful relationships are built, and is vital for fostering an inclusive environment. Research in psychology suggests a trusting environment provides

## CLIENT EXAMPLE LEADING INCLUSIVELY

At VisionCorp, CEO Olivia Williams sought to promote inclusion but postponed investing funds for over 5 years, despite innovative ideas from her team. Without capital to implement initiatives, inclusion languished. Morale suffered and turnover rose among marginalized groups. Finally, a new Chief Diversity Officer convinced Olivia to allocate capital towards inclusion proposals with a strong business case. With funding secured, VisionCorp quickly transformed, earning a reputation for its genuine commitment to inclusion. Olivia learned firsthand that courageous, sustained investment is crucial for inclusion. Though budgets were tight, delaying support for years hampered progress. Her story highlights the power of investing in inclusion from day one to drive cultural change.



the conditions through which diversity efforts can positively affect engagement and retention.<sup>83</sup> Similarly, inclusive leadership has been shown to facilitate **psychological safety**, which in turn increases team creativity and belonging. Psychological safety encompasses the belief that one can voice their thoughts, ideas, and concerns without fear of retribution or judgment. It's about creating a space where everyone feels comfortable expressing their views, especially when it comes to sensitive topics related to diversity and equity.<sup>84</sup> Psychological safety allows for candid conversations about bias, discrimination, and inequities, which are essential for progress.<sup>85,86</sup>

Inclusive leaders acknowledge their responsibility for creating cultures of respect and know that if they are unable to work with people whose social identities are different from their own, they are unsafe. Consequently, inclusive leaders use their voices and

advocacy to spark change.<sup>87</sup> When leaders prioritize inclusivity, the perception of support among their team members increases by 140%.<sup>88</sup> Lack of support from leaders creates feelings of alienation; ultimately unraveling trust, psychological safety, and inclusion.<sup>89</sup>

While CCL's *REAL* framework provides an architecture for designing, delivering, and implementing transformative leadership solutions toward EDI goals, it is buttressed by decades of interdisciplinary scholarship spanning human and organizational development. *REAL* can help organizations understand the dynamics of EDI and its transformative potential. To successfully recruit, support, retain, and activate a future-focused workgroup and organization, it is vital to gain an awareness of the types of diversity within and across groups. It is also vital to understand the inherent challenges to overcome and opportunities to realize when stakeholders from a wide range of backgrounds and perspectives work together.

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## Conclusion

In this paper, we highlighted some of the interdisciplinary research informing development and implementation of the *REAL* Framework. Grounded in Appreciative Inquiry, *REAL* builds on what we know about important aspects of EDI and how they shape organizational cultures, individual behaviors, and collaboration. The *REAL* framework also offers a question-based strategy to ease the inevitable anxieties and obstacles to be experienced on every EDI journey. *REAL* helps organizations figure out how

and when to stay the course, combine EDI efforts with other key initiatives, and reinvent EDI in ways that lead with mission and make positive impacts on the future.<sup>90</sup> While research demonstrates why leading with EDI is important, our implementation of *REAL* is intended to incorporate this knowledge and move toward practical and relevant applications that empower leaders to take real action and responsibility for building organizational cultures committed to experiencing EDI's value and overcoming the

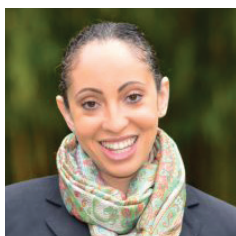
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Chelsea is a trained social psychologist and DEI expert with experience in government, non-profit, higher education, and the private sector. Chelsea was a Graduate Education Diversity Fellow at CCL where she supported initiatives to assess, evaluate, and improve equity, diversity, and inclusion throughout the organization.

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