

A MATTER OF DIFFERENCE

Making the Tough Calls: Negotiating Exclusion in Inclusive and Diverse Organizations

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Diverse and inclusive organizations are supposed to enrich members' task effectiveness, interpersonal relationships, and personal efficacy so that members can achieve their best. In our previous columns, we have tried to communicate the shape and texture of inclusion—to present our vision of what inclusive environments might look like and how they can be cultivated (Davidson & Ferdman, 2001, 2002; Ferdman, 2003; Ferdman & Davidson, 2002a, 2002b).

But the vision of an inclusive organization is severely compromised if it doesn't also address the paradox of inclusion: What happens when someone really doesn't fit in the inclusive environment? This is one of the most challenging questions facing leaders and managers who genuinely want to make their organizations more inclusive. The vision for inclusion may be compelling, but people want to know how to get there and how to "live" there effectively when they arrive.

As we explore this turn on the path toward inclusion, we need to acknowledge our underlying assumptions. First, we approach this from the perspective of the leader-manager in a hierarchical organization. The path toward inclusion could be somewhat different for the organization member who does not have formal authority over others. Second, we assume that people in organizations care deeply about results. Inclusion and diversity discourse often focuses on process (and we shall revisit process here). But organizations also want to understand the link between inclusion and effective business results. There are times when it seems that the two are incompatible. But are they really?

The Dilemma

"As we debated the best strategies for selling the product in this region, my top advisor, known for his candor and insight, stated bluntly: 'Our customers simply won't tolerate having a Muslim, especially one who is orthodox, as a lead consultant. We have to deal with this....'"

In an earlier column, we discussed the fact that boundaries exist that define who is inside and who is outside of an inclusive organization (Ferd-

man & Davidson, 2002a). Such boundaries are rarely drawn without conflict and debate over where the line should rest.

The leader describing this scenario faces a crisis of inclusion.¹ The assumption about Muslims in the scenario challenges the boundaries of inclusion by identifying a group of people who presumably don't belong. When so confronted, the leader has two fundamental choices: (a) challenge the stated assumption and keep pushing toward greater inclusion, or (b) acknowledge the validity of the statement and exclude the person or group member in question. Our goal in previous columns has been to build the rationale and offer some suggestions for how to undertake the former. But we also have to understand what it means to choose the latter (whether in a case like the one with which we started this section, or in other, more subtle but no less challenging situations).

Social psychologist Ellen Langer, when introducing her freshman course at Harvard many years ago, pointed out that there were three kinds of people: those who read the *New Yorker*, those who don't read the *New Yorker*, and those who don't read the *New Yorker* anymore. Even though the last two look the same to others, she noted, they are not really the same, and their difference is quite important to a social psychologist. By analogy, leaders who acknowledge the validity of the exclusionary statement may do so for different reasons. On one hand, the leader may simply ignore the importance of inclusion and carelessly or unconsciously accept the assumption as valid. In our observation, some leaders want to limit greater inclusion, especially in environments they believe are already too inclusive. Sometimes these are the more conservative voices that never wanted the boundaries to stretch in the first place. Others may have been included when boundaries were previously stretched, but now may feel that the stretch has gone far enough. These leaders miss the critical opportunities that a truly inclusive organization can promote (Davidson & Ferdman, 2001, 2002; Ferdman, 2003; Ferdman & Davidson, 2002a, 2002b).

On the other hand, the leader may find herself torn by genuinely wanting to instill an ethos of inclusion but firmly believing that the best interest of the organization is to acknowledge the validity of the statement. How can she deal with the exclusionary nature of this dilemma?

Because most people strive to be fair and to do the right thing, many who value and are committed to inclusion reflexively include any person or group that seems to be excluded. Traditionally, this has been the only stance that people and organizations committed to justice could take—to err on the side of overinclusion—to compensate for the excessive underinclusion (and active exclusion) of the past. But one result of this dynamic is that, some-

¹ Let's assume that the advisor speaks from a grounded assessment of what is true of the business setting and not from some unfounded personal prejudice.

times, we do not develop clear criteria to help us understand who really fits in the organization. In other words, we are not able to discern the appropriate boundaries of inclusion. So we end up confused when faced with the kinds of dilemmas presented by the scenario. Even in the most inclusive environments, everyone cannot fit. Our hope is that if we work at it, we can build something of which anyone and everyone can be a part. But this is just not realistic.

Thus, the leader of the inclusive organization is left with a strangely paradoxical challenge: to know when (and how) to exclude!

Resolution

Ironically, the answer to the dilemma of making the tough calls about exclusion—“exclusion calls” as we refer to them—effectively rests with exercising skill in building an inclusive organization. The leader who wants to nurture inclusion must also create a context in which that inclusion has meaning. Within that context he or she must exercise a set of skills to support inclusion.

In the “Langerian” distinction above, the unskilled leader would decide promptly and without reflection that, “because this is a valid market concern, no Muslims will be placed in the lead consultant role.” In contrast, the skilled leader engages in a clear and thoughtful process that would include a number of elements:

Building the container. The inclusive leader uses the broader context to her or his best advantage. One of the most effective tools for dealing with difference, especially when inclusion dilemmas arise, is to create perspective—to be able to “see the big picture.” This perspective acts as a container inside of which interactions and dynamics can occur. In most organizations, the container is a commitment to the goals and sustainability of the organization (Meyer & Allen, 1997). Leaders challenge the organization’s members to sustain that container by working through disagreements and dilemmas about core values and their operationalization (Heifetz & Linsky, 2002).

Consider the analogy of a healthy family under duress. Members may be in conflict over a variety of issues, but there is often the experience of “getting through” the difficulties and coming to a resolution in which the members feel even closer to one another as a result of their differences. This outcome occurs because there is a foundation—a container—of trust, love, and respect between members that is not compromised by episodic differences. Indeed, stressors handled well can actually strengthen that foundation!

Holvino and Sheridan (2003) write about the importance of building interdependence as a key practice in working skillfully across differences. To the extent that the organizational container incorporates and promotes interdependence among members and groups, it should be more likely that leaders will be able to make better “exclusion calls” when necessary and more

importantly, less likely that they will be faced with unnecessary and invalid claims that certain groups or people need to be excluded.

Context of organizational values. The strength of the organization's values about inclusion also affects the leader's capacity to deal effectively with exclusion. The organization may draw the line differently at what is appropriate in various situations. For example, if the organization sees itself as a role model in being inclusive, the values of the organization might encourage the leader in our earlier example to push back on the client who won't accept a Muslim consultant. Yet, in another situation, the leader may suggest that, given the nature of the business and the clients, it would not be suitable to use a consultant who is a bit shaky in English despite speaking four other languages proficiently.

Leaders in inclusive organizations can and should reinforce the value of inclusion and ask themselves and their people to thoughtfully and consistently apply that value together with other core values of the organization. The challenge for the leader faced with calls for exclusion is, as Miller and Katz (2002) suggest, to work to establish new baselines for inclusion that go beyond conventional wisdom. Ultimately, whatever decision is made in a particular case, a key test will be whether the process and the outcome support the organization's values and reinforce inclusion, or undermine them and support systematic exclusion.

Analyzing the task. The effective leader must carefully consider the nature of the tasks at hand in determining whether exclusion is a necessary option. When Phil Jackson, the former coach of the Chicago Bulls basketball team in the 1990s, was asked about his apparent tolerance for the behavior of an eccentric player on the team, Dennis Rodman, Jackson was often clear in observing that Rodman, though prone to wearing dresses, was still the best rebounder in the league. The task Jackson needed personnel for was to rebound. Rodman rarely wavered in his flawless execution of the task.

The story is important because it reveals an important competency for the inclusive leader. Understanding the nature of the task is a prerequisite for knowing who could or could not execute the task. More importantly, the leader must not be duped into thinking that irrelevant surface differences or historical patterns of exclusion of members of given groups from particular tasks affect a person's ability to accomplish the task. By the same token, this clarity of task will also serve the inclusive leader in determining when someone is not the right person to accomplish the task.

Candid communication. In general, the best outcomes under stress or in conflict situations result when people have an opportunity to communicate clearly how each sees the situation, what feelings are evoked, and what the impact is on each (e.g., Stone, Patton, & Heen, 1999). In attempts to nurture inclusion, organization members often hold their tongues when they should speak candidly. Sometimes this takes the form of "political correctness,"

sometimes simple indifference. Members of the organization become so attached to the illusion of compatibility that they withhold—sometimes consciously, sometimes unconsciously—their real sentiments. This undermines the capacity to have a culture of open communication, one of the core aspects of an inclusive culture (Davidson & Ferdman, 2001). Ironically, the tendency to react to overinclusion by not confronting the “inclusion conflicts” actually undermines the inclusion that one is so committed to building.

In some instances, this communication skill may even extend to engaging the potentially excluded parties. The principle is that the more cogent and diverse voices the leader can engage and the more she or he engages the relevant diversity, the more likely the right call will emerge.

Questioning assumptions. Are we willing to question old (and typically unquestioned) assumptions about who can do what when, or what skills or profile is needed to get certain tasks done? If we do so, we are more likely to make wise choices. To make tough calls about exclusion skillfully, leaders must not agree to a course of action just because “that’s how it has always been done,” because a survey points in a certain direction, or because “the majority rules.” The leader faced with the scenario we began with, before choosing to deal with the situation by choosing exclusion, must explore and question a range of assumptions, including those about the implications of customer intolerance, the organization’s role and responsibility regarding social change, and the appropriateness of discomfort and conflict in business situations.

Acknowledging the role of time. Inclusive leaders should consider the role of time in the dynamics of determining when particular degrees of inclusion or exclusion are appropriate. History and intergroup dynamics can consciously and unconsciously affect how we assess whether inclusion or exclusion is warranted. For example, there is often a history between the relevant groups, either antagonistic or supportive, that can and should be discerned by the leader, both inside the organization and in its external environment. In carrying out this assessment, it is often helpful to seek counsel from a broad range of perspectives.

Revisiting and learning from decisions. Whether the ultimate decision is to exclude or include, a commitment to re-examine the decision and the process by which it was reached is critical for the inclusive leader. Such an analysis together with constant inquisitiveness about how to stretch the boundaries of inclusion at a later point distinguishes a more thoughtful, skilled approach from a “knee-jerk” one. Simply accepting exclusionary practices because “that’s how it has always been done” is the wrong approach, in our view. Making difficult calls after a period of broad-based input and consideration is more skillful. This is important because invariably, we will make mistakes.

Consider the case of Gabriel García Márquez, the Nobel-Prize winning Colombian novelist. As a “lay” publisher, we might reflexively assume that a critical skill for a writer is knowing how to spell properly. We might believe

that it is quite reasonable to exclude a poor speller from a position as a copywriter for a newspaper or advertising agency. Yet, in his recent autobiography, García Márquez (2002) reveals that he has always been a notoriously atrocious speller and has depended completely on proofreaders to correct the spelling in his manuscripts!

Effective leaders of inclusion must be constantly vigilant in this regard.

Conclusion

We believe the sum of the leader's efforts in these areas creates wisdom in engaging inclusion. In other words, knee-jerk reactions are less likely to be helpful than thoughtful, engaged processes. There is no rule book or formula to tell a leader exactly what to do to create an inclusive environment. In this respect, leading inclusively is as much art as it is science. Yet, decisions about inclusion and exclusion must be made. We offer these options and suggestions as a way to tackle this challenge.

But there is another benefit to wise inclusive leadership. In an era of careflessness and political correctness, wise inclusive leadership frees the leader to remain passionate about what she or he believes without fearing that the passion will squelch other members' commitment and engagement. It sets a tone for candor and creates a vehicle for repair in the face of mistakes that ultimately enhances the effectiveness and the well-being of the organization.

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