Experiencing Workplace Inclusion: Critical Incidents that Create a Sense of Inclusion for Professional Staff in Higher Education

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Presented to the Faculty of
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In partial fulfillment for the degree of
DOCTOR OF PHILOSOPHY

by

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This dissertation, by Katherine Penn Lampley, has been approved by the committee members signed below who recommend that it be accepted by the faculty of the Graduate School of Leadership & Change Antioch University in partial fulfillment of requirements for the degree of

DOCTOR OF PHILOSOPHY

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Professional staff make up the majority of employees at colleges and universities in the United States but are rarely the focus of research in higher education. As a result, little is known about how these employees experience the workplace, creating a challenge for educational institutions working to attract, develop, and retain this essential resource. Employees who feel included in the workplace have higher performance levels and are more likely to remain with their organizations, but workplace inclusion is a complex and undertheorized psychological phenomenon. This exploratory study provides insight into the psychological experience of inclusion by examining the experiences, interactions, and moments that caused professional staff to feel included at work. Using constructivist critical incident technique (CIT), semi-structured interviews were conducted with 23 participants to uncover 78 inclusion incidents and the context surrounding those incidents at various levels within the organization. The findings reveal two main pathways to inclusion for professional staff in higher education: the affirmation and impact pathways. Inclusion incidents in the affirmation pathway emerged from experiences or interactions where an individual, team, or organization affirmed the professional staff member’s personal or professional identity. Inclusion incidents in the impact pathway emerged when professional staff members took some action that impacted an individual or the organization. An intersectional view of the results demonstrates that all participants, irrespective of social identity, experience inclusion in the workplace, expanding the perception of who benefits from inclusive environments. Analysis of the detailed descriptions of the outcomes of these incidents supports the expansion of the dominant conceptualization of workplace inclusion to include authenticity in addition to belongingness and uniqueness. This dissertation is
available in open access at AURA (https://aura.antioch.edu/) and OhioLINK ETD Center (https://etd.ohiolink.edu).

Keywords: professional staff, higher education, critical incident technique, workplace inclusion, belonging, authenticity, uniqueness, leadership
Dedication

This dissertation is dedicated to the two phenomenal women who have had the most influence on my life: my mother, Barbara Boal Christopher, and my daughter, Mya Renee Lampley. Together we represent three generations of determined, persistent, and talented women who have taken everything life has thrown at us and found a way to keep moving forward. Mom, you instilled in me a deep curiosity and love of learning that propelled me on this journey and has sustained me through many challenges. Kiddo, you continue to inspire me with your creativity and ability to see the world in new and unexpected ways. Your faith in me and unwavering support of my goals constantly remind me that anything is possible if you “choose happy” and refuse to give up. This dissertation is a testament to that spirit, and I am grateful to be able to share this achievement with you.
Acknowledgements

There is an African proverb that says, “If you want to go fast, go alone. If you want to go far, go together.” At the start of this journey, I could not have appreciated the relevance of that proverb to this process. My goal was to go fast, earn this degree, and continue my career. Life had other plans. Six years later, as I look back, I see the folly in that approach. The power and the joy of this process lay in the deep reflection that can only happen when you pause and the learning community that is built when you let people in. This was very much a collective achievement, and I am grateful to the village that celebrates this doctorate with me.

I offer my deep respect and gratitude to my dissertation committee; chair Dr. Lize Booysen, methodologist Dr. Harriet Schwartz, and committee member Dr. Jaye Goosby Smith. I was honored to work with such a phenomenal group of scholars. You provided critical guidance, challenged my thinking, and encouraged my curiosity. I am fortunate to have been mentored and supported by you and will be forever grateful. A special note of thanks to Dr. Daryl G. Smith, who was my ILA-B coach and graciously shared her expertise to help me to refine my research aim and question.

In choosing to study the experiences of professional staff, I endeavored to elevate the voices of an often-overlooked population in higher education. The 23 professional staff members who agreed to share their experiences of inclusion reminded me that there is a lot of good happening all around us. The incidents they shared demonstrate the importance of high-quality connections and the power of micro affirmations in the workplace. I am grateful for their time and willingness to share these very personal narratives.

I had the immense pleasure of teaching a course with Dr. Marcy Crary in 2016. She became the spark that took the idea of entering a PhD program and made it a reality. She, and her
husband, Dr. Douglas Hall, read every draft of every learning achievement in this program. Marcy was my cheerleader, sponsor, mentor, and motivator at every step of this journey. I will fondly remember all of our conversations in your sunny breakfast nook and the many times you got me unstuck. Thank you for pouring so much into me and celebrating along the way.

I was not aware of the Antioch community before discovering it in a search for flexible PhD programs. I now count myself a proud Antiochian. This learning community is a treasure. Dr. Laurien Alexandre has gifted the World a victory for humanity. I want to thank my amazing cohort, C17. You are the most diverse group of scholar-practitioners I have ever encountered, and I feel privileged to have learned, laughed, and grown in your company. I especially want to acknowledge my Roomies—Mea Ashley, Renee Bradford, Sharlene Frank, Dee Nicholas, and LaTanya White. Your friendship and love nurtured me in a way I didn’t know I needed, but I am so lucky to have found. And finally, to Team CIT—Aimee Califano, Brigette Collins, LauraLynn Jansen, and Pam Viscione—thank you for providing an anchor during this last phase of the journey. Our monthly calls and the advice and encouragement helped me to stay focused and visualize the finish line.

And finally, to my family, colleagues at Bentley, and friends all around the world, thank you for listening to me drone on about my research, letting me experiment with different change techniques during projects, and understanding when I canceled yet again because I needed to work on my dissertation. I am a lucky woman to be the recipient of your unwavering and sustaining support. There is no limit to how far we can go because we are on this path together.
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CHAPTER I: INTRODUCTION

The words *diversity* and *inclusion* are commonly paired in organizations today. While diversity has been studied as a concept and the management of diversity has been understood as a practice (Thomas, 1990) for many years, inclusion as an organizational practice is a relatively new concept, one lacking in definition and clarity (Ferdman & Deane, 2014; Shore et al., 2018). Many practitioners have welcomed the concept of inclusion to shift the conversation about diversity from a negative, deficit-based approach focused solely on the needs of marginalized groups to a more positive and strengths-based approach focused on the unique identities and abilities of all individuals within an organization (Linnehan & Konrad, 1999; Pless & Maak, 2004). For researchers, it has spawned a wave of conceptual papers proposing different models and frameworks for understanding inclusion (Downey et al., 2015; Nishii, 2013; Roberson, 2006; Sessler Bernstein & Bilimoria, 2013). Shore et al. (2018) attempted to categorize the various themes in a review of the inclusion literature and identified five areas of research: workgroup inclusion, leader inclusion, perceived organizational inclusion, inclusive organizational practices, and inclusive climate. Each of these themes uses a different lens to explore the concept of inclusion with a mix of empirical evidence to support the theory. Except for the workgroup inclusion theme, all of these themes center the organization or leader in efforts to conceptualize inclusion, mainly ignoring the individual experiences of inclusion within organizations.

There has been additional research focused on the organizational (Hope Pelled et al., 1999; Mor Barak & Cherin, 1998; Nishii, 2013; Sabharwal, 2014) and group dimensions of inclusion (Chung et al., 2020; Jansen et al., 2014), less focused on the individual psychological experience of inclusion or employee felt inclusion (Buengeler et al., 2018; Sims et al., 2019). The lack of understanding about the psychological mechanisms that create a sense of inclusion,
conceptualized at the individual level as a balance of belongingness and uniqueness or authenticity (Jansen et al., 2014; Shore et al., 2011), makes it challenging to link practices to perceptions of inclusion (Slepian & Jacoby-Senghor, 2020). Leaders within organizations are expected to create inclusion for employees instead of empowering individual employees to develop a sense of inclusion in the workplace for themselves and others (Buengeler et al., 2018; Slepian & Jacoby-Senghor, 2020; Smith, 2020). Marginalized groups are often the subject of studies about the experience of inclusion, and there is little research that explores the impact of identity through an intersectional lens (Slepian & Jacoby-Senghor, 2020). My inquiry is meant to achieve a deeper understanding of the psychological experience of inclusion in the workplace by exploring significant moments of inclusion experienced by professional staff in higher education. These are conceptualized as the moments, experiences, or interactions that cause individuals to feel a sense of belonging and uniqueness at work (Shore et al., 2011).

Context matters, and the higher education sector needs more research focused on inclusion. The creation of inclusive environments is an increasingly popular concept in higher education as organizations shift to respond to an ever more diverse student body. The practice of and research on inclusion in higher education centers on the experiences of students and faculty. However, according to the College and University Professional Association for Human Resources (CUPA-HR; Bichsel et al., 2020), there are two staff members on a typical campus for every faculty member. The experiences of staff, defined as non-academic employees who are responsible for supporting the operations of the institution, are rarely examined, and their narratives are predominantly shared in terms of how they support the learning environment for students and research and instructional efforts of faculty (Curran & Prottas, 2017; Graham, 2012; Riffe & Barringer, 2021; Smith, 2020). Concepts that have been heavily researched for students
and faculty in higher education settings like the impact of identity on experiences and outcomes, are rarely examined among professional staff (Smith, 2020). The lack of information about this population’s experiences limits practitioners’ ability to develop specific programs, policies, or practices targeting this important stakeholder group on campus. It also prevents professional staff from acting in ways that encourage inclusion for themselves and others.

Responsibility for creating an inclusive campus environment often falls to the chief diversity officer (CDO) on campus. However, more insight into the unique experiences that drive the sense of belonging and uniqueness/authenticity necessary for campus employees to feel included is necessary. There needs to be more in scholarly and professional journals about the lived experiences of inclusion, particularly of professional staff. This study attempts to “pivot the margin” (Shockley & Holloway, 2019, p. 259) by centering the experiences of this overlooked population and bringing their incidents of inclusion forward to enlighten practitioners and empower professional staff members to create more inclusive environments for themselves and others on campus.

Research Question and Areas of Exploration

The aim of this research is to gain a deeper understanding of the psychological experience of higher education professional staff with inclusion in the workplace by exploring significant moments of inclusion. In this study, inclusion is conceptualized as moments, experiences, or interactions that caused individuals to feel a sense of belonging and uniqueness at work (Shore et al., 2011). The main research question in this study is: what are the critical moments that generate a feeling of inclusion for professional staff in higher education institutions? The research also explores these sub-questions:

- At what levels in the organization are these incidents occurring?
• How do these critical moments of inclusion impact professional staff members’ self-concept in their organization?

Despite the existence of quantitative scales to measure perceived inclusion (Chung et al., 2020; Jansen et al., 2014; Pearce & Randel, 2004), this study used a qualitative approach to deepen understanding of the moments when inclusion is experienced through the perspective of participants. Interviews were conducted using critical incident technique (CIT; Flanagan, 1954) as the principal methodology. Individuals identifying as professional staff were asked to describe significant moments or interactions that generated feelings of inclusion in the workplace. Follow-up questions explored the context of the experience, the events that preceded the experience, and what impact resulted from the experience. The analysis of these incidents enabled the exploration of the levels at which these experiences are occurring within the organization—individual (micro), interpersonal/relational (micro), or organizational (meso)—and the impact these experiences have on the participant’s self-concept within the organization.

Key Terms

Inclusion

A review of the literature reveals several definitions of inclusion that center on either the organization or the individual. Organizational definitions focus on practices and policies. For example, Ferdman (2014) defined inclusion in terms of “how well organizations and their members fully connect with, engage, and utilize people across all types of differences” (pp. 3–4). Pless and Maak (2004) defined inclusion as “an organizational environment that allows people with multiple backgrounds, mindsets, and ways of thinking to work effectively together and to
perform to their highest potential in order to achieve organizational objectives based on sound principles” (p. 130).

Individual definitions of inclusion focus broadly on the cognitions and psychological states of individuals within the organization (Tang et al., 2015) or within the workgroup. Avery et al. (2008) articulated this in terms of how the individual feels the organization engages the employee. Hackman and Dunnette (1992) described inclusion as resulting from the experiences in the individual’s immediate work group. Shore et al. (2011) defined inclusion as “the degree to which an employee perceives that he or she is an esteemed member of the work group through experiencing treatment that satisfies his or her needs for belongingness and uniqueness” (p. 1265).

Shore et al.’s (2011) definition will be used for the current study. This deepens understanding of the experiences referred to in this definition and focuses on the following questions:

- What are the critical moments that create a sense of inclusion for professional staff in higher education institutions, leading to the feelings of belongingness and uniqueness described in this conceptualization of inclusion offered by researchers?
- If perceptions of inclusion are driven by experiences or interactions, what do we know about the nature of those experiences? At what levels in the organization are these incidents occurring?
- How do these critical moments of inclusion impact professional staff members’ self-concept in their organization?
**Professional Staff in Higher Education**

Inclusion among higher education professional or administrative staff has been less thoroughly researched than academic staff or faculty (Harris, 2019; Marcus, 2000; Sánchez et al., 2020; Smith, 2020). There are a variety of terms used to describe this group, including administrative workers (Szekeres, 2004), non-academic employees (Curran & Pratts, 2017), support professionals (C. L. Cameron, 2020), or simply staff (Mayhew et al., 2006). A common way of identifying these employees is by their work, which focuses on administrative tasks instead of research or teaching (C. L. Cameron, 2020; Curran & Pratts, 2017; Szekeres, 2004). My research uses the definition of professional staff drawn from the CUPA-HR (Bichsel et al., 2020) which separates employees into four main categories: faculty, administrators, professionals, and staff. Definitions of each category and examples of positions included in the category are listed in Table 1.1.

The definition utilized in the CUPA-HR survey is the basis of the definition used in this study. It excludes senior officers and leaders of administrative divisions but does include employees in administrative areas of the university, such as enrollment, advancement, communications and marketing, student affairs, administration and finance, and facilities (Bichsel et al., 2020). *Professional staff* includes employees who work in but do not lead or manage an entire functional area, division, or department, such as client support specialists in IT, data scientists, admissions and financial aid counselors, student activities, health and wellness staff, and alumni relations. Employees who fall into any of the remaining CUPA-HR categories—like staff or administrators—would be excluded from the study to provide a level of consistency across job types.
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<th>Definition</th>
<th>Position Area</th>
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<td>Administrators in Higher Education</td>
<td>Positions with primary assignments requiring management of the institution or a customarily recognized division within it.</td>
<td>chief executive officer, vice president, executive vice president, provost, associate/assistant provost, dean, associate/assistant dean, provost, bursar, chief of staff to system or institution CEO</td>
</tr>
<tr>
<td>Faculty in Higher Education</td>
<td>Full-time faculty, adjunct faculty, postdoctoral scholars, and non-tenure-track research faculty.</td>
<td>teaching/research professor, associate professor, assistant professor, instructor/lecturer; research scientist, postdoc scholar</td>
</tr>
<tr>
<td>Professionals in Higher Education</td>
<td>Functional professional positions with primary assignments and responsibilities requiring professional-level expertise and work in a specific functional area, such as academic or student services, facilities management, human resources, information technology, athletics, etc. Positions covered include those with supervisory duties that only represent some of their time and effort. Positions generally require at least a baccalaureate degree or equivalent in the field and may require a terminal degree and professional licensure.</td>
<td>study abroad coordinator, academic advisor, instructional designer, librarian, chaplain, admissions counselor, financial aid counselor, associate registrar, student career counselor, student residence hall director, student health coordinator, student activities officer, head coach, title ix investigator, ombudsperson, HR generalist, purchasing or materials manager, budget analyst, annual giving officer, communications or marketing specialist, event coordinator, architect, electrical engineer, principle systems analyst, web designer, database administrator</td>
</tr>
<tr>
<td>Staff in Higher Education</td>
<td>Non-exempt positions commonly found in higher education institutions are generally paid an hourly rate and are eligible for overtime.</td>
<td>administrative/executive assistants, student services coordinators, research assistants, groundskeepers, advancement specialists, custodians, police officers, it system specialists, and electricians</td>
</tr>
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</table>

*Note*: Based on CUPA-HR classification (Bichsel et al., 2020).
Rationale of Study

The need to create more inclusive campus environments has been well articulated for students and faculty (Williams et al., 2005). The looming demographic cliff (Grawe, 2018) and the rise in social justice activism on college campuses have forced Universities to reconsider established norms and practices to ensure they meet their enrollment goals and successfully recruit and retain a diverse faculty. The education case for diversity and inclusion within higher education rarely mentions the recruitment or retention of professional staff. The goal is primarily articulated as leading to a beneficial environment for students and faculty.

The rationale for creating inclusive environments for professional staff has yet to be clearly explained. There is a wealth of research about the business case for diversity within corporate environments and recent findings that diversity and inclusion—not increased diversity alone—drives outcomes like enhanced financial performance (Hunt et al., 2020). However, it is unclear if these findings hold true in a higher education context with a unique decentralized system emphasizing shared governance and multiple subcultures.

There is also a call from many areas of higher education to address the effects of privatization in higher education (Kezar et al., 2019). Combined with the pandemic and disappointment in response to social justice concerns, this has increased the pressures on professional staff, making them question the once appealing culture and climate in higher education. What has been referred to as “the great resignation” in the larger workforce is seen more as “the great disillusionment” in higher education (Ellis, 2021). Professional staff cite a feeling that the sense of mission has faded, a lack of appreciation by the organization and managers, and conflicts between espoused and enacted values as reasons for leaving.
Understanding what helps this group feel a sense of inclusion is necessary to reconnect with the institution, its peers, and the overall mission.

In a London School of Economics lecture titled *Beyond Diversity: Are Inclusive Organizations Truly Attainable*, Quinetta Roberson (2018) argued that “when organizations talk about inclusion, they talk about practices and policies. When people talk about inclusion, they talk about their experiences” (23:01). This demonstrates the need for more research to explore the personal narratives of people within organizations to allow a deeper understanding of how inclusion is enacted within those organizations. This insight influenced the choice of a qualitative approach to this research and the selection of CIT as a methodology, more specifically. This methodology allows the researcher to move beyond asking participants to describe what inclusion means to them learning more specifically of what experiences or interactions cause them to feel a sense of inclusion. Collecting these incidents and examining the emerging themes provide practitioners a better understanding of how professional staff view inclusion and how inclusion is created.

One way of approaching this inquiry would have been to ask about disillusionment with experiences of exclusion or disconnection. Instead, this research sought not only to elevate the voices of this critical group but to elevate these affirming experiences. It is essential to understand how professional staff may be experiencing barriers to fulfillment but just as important to find out what makes them feel they belong and how their unique contributions are valued. My research uncovers these experiences to provide a more complete picture of these workplace experiences of inclusion.

The scope of this study was defined to provide consistency during the analysis. Limiting the type of institution and the definition of who qualifies as professional staff was meant to
provide some boundaries to the inquiry to allow consistency across contexts and to limit organizational and group contingency factors. Rather than isolate the inquiry to a single university, this research allowed participation from a variety of institutions. To control for variability across institutions, the study was limited to United States-based, small to medium-sized four-year private colleges. A wider view was taken within institutions regarding the fields represented. Participants represent various areas like student affairs, advancement, information technology, and enrollment. Again, to control for variability across divisions, participants had to identify as professional staff members defined by the CUPA-HR categories referenced in Table 1.1. This excluded hourly employees and those who manage an entire division but still encompasses a large swath of employees and will provide a large sample.

**Methodological Selection**

This research focuses on the experiences that create a sense of inclusion from the perspective of professional staff in higher education. There is research that examines the ways inclusion is encouraged through policies and practices. However, less is understood about the specific experiences that cause an individual to feel this psychological sense of inclusion. Qualitative methodologies are the best way to explore these personal experiences within an organizational setting (Creswell & Poth, 2018). There are many qualitative methodologies to choose from, like narrative inquiry, case study, or grounded theory; however, CIT (Flanagan, 1954) emerged as the best fit for this research for several reasons.

While CIT originated as a method of data collection focused on direct observable tasks or behaviors (Flanagan, 1954), it has evolved substantially to include retrospective self-reported psychological experiences like incidents where individuals feel a sense of inclusion (Butterfield et al., 2005; Woolsey, 1986). Data collection using CIT has also expanded to include the
exploration of wish list items that allow the researcher to explore the context of the experience being described in the incident. These items are defined as “people, supports, information, programs, and so on, that were not present at the time of the participant’s experience, but that those involved believed would have been helpful in the situation being studied” (Butterfield et al., 2009, p. 267). The addition of several methods to establish credibility and trustworthiness also marks an evolution, including a form of CIT referred to as *enhanced critical incident technique* (Butterfield et al., 2009), which takes a more post-positivist approach to data analysis (McDaniel et al., 2020). CIT allows the researcher to go beyond the exploration of the individual’s experience to understand how that experience contributed to the feelings or emotions that result from the experience. CIT is “exploratory by nature and is appropriate to use when the researcher is interested in learning more about little-understood events, incidents, factors, or psychological constructs” (Butterfield et al., 2005, p. 483). This exploratory approach is critical given the need for more understanding of the explored construct and the lack of research about the experiences of this specific population.

Several factors distinguish CIT as a better fit for my research than other qualitative techniques. Focusing on critical or significant events distinguishes this methodology from others. In understanding the significant moments of inclusion experienced by professional staff, my research moves beyond the definition of what it feels like to be included to describe the experiences and interactions that prompted those feelings. Getting to this level of inquiry requires a methodology that centers on the critical incident defined by the participant. Adding contextual questions that explore the conditions that preceded and followed the incident provides essential information that helps to understand the phenomenon at multiple levels. The inclusion
of wish list items gives the approach a level of flexibility and context that adds to the level of analysis.

CIT originated in positivist ontological and epistemological approaches to research (McDaniel et al., 2020). In this worldview, there is a truth—and that truth can be found and measured. As CIT has evolved it has shifted to represent a broader range of worldviews, the two dominant ones being post-positivist, and constructivist approaches. Enhanced CIT (Butterfield et al., 2005) takes a post-positivist epistemological view that, while complete objectivity is not possible, efforts should be taken to reduce any bias or influence of the researcher when collecting and analyzing data. In this worldview, there is a strong emphasis on understanding cause and effect and testing existing theories (Creswell & Creswell, 2017). Constructivist CIT (Goosby Smith, 2021; Holloway & Schwartz, 2014) takes a different worldview that emphasizes subjective views of truth. This research approach deepens understanding by exploring all the complexities of an issue instead of using a reductionist approach. In constructivist CIT, the researcher’s perspective is welcomed, and there are no attempts to prove or disprove the participants’ perspectives through extensive verification in the analysis (Creswell & Creswell, 2017).

**Researcher Positionality**

As a researcher, I favor post-positivist approaches to understanding reality. I am a problem solver, and reductionist thinking helps to isolate the problem and get to a solution. However, my interest in the psychological experience of inclusion favors an ontological view that there are multiple realities. Rather than confining those realities to existing models or frameworks epistemologically, I was more interested in uncovering and exploring these subjective perspectives. I reluctantly acknowledged that a post-positivist approach would not
ultimately get me to the place I most wanted to go, which was to elevate the voices of professional staff and to appreciate the ways they are affirmed through interactions and experiences that cause them to feel a sense of inclusion. To get there, a constructivist approach to critical incident technique provided the rich detail currently missing from the discussion about the experiences of inclusion in an organizational context.

**Research Design**

This research study is aimed at uncovering the lived experiences of inclusion for professional staff in higher education. The inquiry focused on the significant moments that fostered this sense of inclusion for these individuals. Using CIT allowed the collection of these incidents and centered their experiences in the analysis and findings. The research followed the five steps outlined for the CIT method by Butterfield et al. (2005): “(1) ascertaining the general aims of the activity being studied; (2) making plans and setting specifications; (3) collecting the data; (4) analyzing the data; and (5) interpreting the data and reporting the results” (p. 478). The interviewing and data analysis approach was also informed by prior research by Goosby Smith (2021) and Holloway and Schwartz (2014).

There were three essential goals for this research study. The first was to pivot the margin (Shockley & Holloway, 2019) by elevating the experiences of a less researched population in higher education, professional staff. The second was to uncover the significant moments of inclusion experienced by these staff members in their workplace. The third was to use those incidents to gain a deeper understanding of how inclusion is fostered. This will assist individuals and organizations to create more inclusive environments in higher education for professional staff—uncovering the lived experiences of inclusion of professional staff in higher education to inform the creation of more inclusive workplace environments in higher education. These goals
informed who was selected for the study, and how the data was collected and analyzed (Chapter III).

**Significance of the Study**

This research contributes to the literature in four significant ways. First, it helps to advance understanding of inclusion at the individual level within an organizational setting. Most of the literature on inclusion is focused on the creation of inclusive environments at the organizational levels or the practice of inclusive leadership at the organizational or group level. Very little prior research has examined the psychological experience of inclusion that is advanced in the framework initially proposed by Shore et al. (2011).

Second, this inquiry is to advance understanding of the undertheorized phenomenon of inclusion within higher education. Little has been written about inclusion in higher education, where concepts like mattering (Prilleltensky et al., 2020) and belonging are more prevalent.

This inquiry was focused on a less researched population in higher education: professional staff. Elevating their inclusion incidents will help to advance the understanding of the experiences of this critical population in a way that is sorely needed in this industry (Harris, 2019; Marcus, 2000; Sánchez et al., 2020; Smith, 2020).

Finally, utilizing CIT to conduct research in higher education helps to advance this methodology in research conducted in a higher education context. Few studies utilize CIT in exploring the experiences of students, faculty, or staff, and this study would contribute to the call for it to be used more extensively (Douglas et al., 2009; Vianden, 2012). My research also helps reinforce CIT as a methodology, not simply a method embedded within other qualitative methodologies like case studies or grounded theory (Viergever, 2019).
Scope of the Research

The focus of this study was not to generalize the experience of inclusion for professional staff or in higher education but rather to provide context to help expand understanding of what drives the experience of inclusion for this group in this specific industry. The critical incidents that were captured and analyzed cannot give a complete picture of what causes individuals to feel included. However, it does provide much-needed insight that will benefit practitioners and researchers as they continue to build their knowledge of this phenomenon.

The research narrowed the focus of inquiry in a few specific ways that allow readers to understand the experience of inclusion through the findings. Limiting the industry to higher education and, specifically, small to medium-sized United States-based higher institutions of learning, made it easier to understand the specific context in which these incidents are occurring and help to enhance transferability. Limiting to these types of institutions make it difficult to say if these experiences occur in larger institutions or community college environments, but generalizability was not the goal. Similarly, by excluding faculty or hourly staff and administration, there is no way of knowing if those groups would have similar experiences. However, the focus on professional staff allows their perspectives to be amplified in ways they currently are not in the literature.

In the study design existing frameworks (Jansen et al., 2014; Shore et al., 2011) are referenced for the psychological experience of inclusion. However, the intention was not to shape the data collection or analysis around these conceptual models. Instead, the goal was to allow the participants in this study to define what inclusion means to them and to identify the experiences that caused them to feel included. A positive organizational lens was deliberately used to explore the experiences of inclusion. This choice did not prevent participants from
discussing experiences of exclusion or offering reflections on any costs associated with inclusion. The focus was, however, on experiences that have caused individuals to feel a sense of uniqueness and belonging in their organizations. In this way more detail and depth will be provided in an industry and within a population that has yet to be thoroughly explored.

Organization of the Dissertation

In this doctoral research I seek to contribute a more complex and nuanced understanding of the experiences and interactions that create a sense of belonging, uniqueness, or authenticity for professional staff in a higher education context. Chapter I identified the problem this research will address, provided an overview of the methodology and research design, and explained the inquiry’s rationale, significance, and scope. Definitions of key terms were provided to clarify the intended target of the research. The remaining chapters will elaborate on the arguments presented in this chapter, give more detail about the methodology and design, and present and discuss the findings of my research.

Chapter II introduces the concept of inclusion, the phenomenon at the center of this research. Inclusion is defined and critical themes that inform our understanding of this concept in an organizational context are provided, and related concepts are introduced. An introduction to higher education is provided, and a review of research into inclusion in that context is reviewed. How the experiences of professional staff have been explored is also provided. Finally, there is an introduction to positive organizational scholarship as a research approach.

Chapter III is a deep dive into the chosen methodology for this research and details the history and structure of the methodology. Other research using this methodology in higher education is also reviewed. The chapter also provides a detailed overview of the research design, including data collection and analysis.
Chapter IV details the discoveries that emerged from the analysis of the incidents provided by participants. The categories and themes that emerged from the interviews is presented along with quotes from the participants that highlight the discoveries. Chapter V reviews the finding and implications. A variety of suggestions are offered for practitioners.
CHAPTER II: LITERATURE REVIEW

Inclusion

Inclusion within an organizational context has more recently been conceptualized and measured as a combination of uniqueness (Shore et al., 2011) or authenticity (Jansen et al., 2014) and belongingness (Chung et al., 2020; Salib, 2014). This conceptualization represents an evolution in the understanding of inclusion within organizations in that it moves from a job characteristic like access to information or involvement in decision-making (Bae et al., 2017; Mor Barak & Cherin, 1998; Nishii, 2013) to a psychological construct focused on perceptions of belonging and uniqueness or authenticity (Chung et al., 2020; Salib, 2014). This conceptualization allows analysis of inclusion at an individual and interpersonal level because it acknowledges the needs of the individual within the organization. Based on Brewer’s (1991) optimal distinctiveness theory, the inclusion framework (Shore et al., 2011) recognized the simultaneous desire for assimilation and differentiation that individuals negotiate to achieve group membership. These conceptualizations are more connected to how this study aims to understand the experiences of inclusion and the factors in interactions with others or organizational experiences that drive the perception that the employee feels included.

Levels of Inclusion

Inclusion within an organization can be understood at a variety of levels (Figure 2.1). Inclusion is a combination of multiple factors and influences that ultimately create the experience of inclusion for an individual within the organization. Smith (2020) used the metaphor of a gardener to explain the multi-faceted nature of inclusion. She speaks of the eco-system as the society, the garden as the organization, the soil as the culture, the gardeners as the leaders, and the plants as the individual employees or groups. The cultural context in which
the organization operates influences the broadest level, which is the societal level. Differences in cultural dimensions (Hofstede, 2001), like power distance, individualism, or uncertainty avoidance, impact how practices and policies are implemented within organizations.

**Figure 2.1**

*A Multi-Level Systems Framework for Inclusion*


The organizational level of inclusion includes the climate and cultural impact on the structures and systems that influence the behavior of employees. Much of the literature explores
the leadership level of inclusion within organizations (Nishii & Rich, 2014; Offermann & Basford, 2014). Leaders have been shown to play a crucial role in fostering inclusive environments through their practices (Booysen, 2014; Ferdman & Deane, 2014; Nishii, 2013).

Another crucial level at which inclusion is influenced within organizations is the group level. Within the context of an organization, groups can create cultural norms and practices that can enhance or offset the organization’s practices (Ferdman, 2017).

These levels are critical to understanding inclusion within organizations, but more research is needed about the individual and interpersonal/group experience levels. At these levels, there is tremendous untapped power to influence the culture because, at this level, behaviors and experiences occur most frequently for individual employees. It is harder for individuals to influence the organizational culture overall; only some employees interact with leaders regularly. However, there is potential to foster a sense of inclusion in the seemingly small daily interactions between colleagues. Individuals can engage in behavior that influences how those around them feel about their workgroup and send cues about whether to assimilate or differentiate. The individual level is about the psychological state someone is in when encountering the effects of all the previously named levels in the organization.

In this examination of inclusion, the levels of interaction are essential. The individual level is the primary level of interest; however, any understanding of the experiences of individuals within an organization would only be complete by putting into context the impact of the organizational culture and climate. The organizational culture reflects the common assumptions and ways of being within the organization, while the climate is more narrowly defined as how people experience the culture within the organization (Ehrhart et al., 2013). Similarly, it is critical to understand the group norms and practices within the organization to
provide a deep understanding of the experiences of inclusion for professional staff (Ferdman, 2014). For example, in examining individual incidents of inclusion, it is essential to consider who is involved in the moments. Are the incidents of inclusion being told about peers, supervisors, units, or the organization broadly? Buengeler et al. (2018) added the dimension of collective identity to personal and interpersonal level interactions. Within this additional dimension, it is vital to consider self-identity at each level—who I know myself to be, who I am in interactions with others, and who I am as part of the larger group/organization.

**Authenticity, Uniqueness, and Belonging**

Social identity theory (Turner & Tajfel, 1986)—how a person creates a sense of who they are based on the groups they identify most closely with—is foundational to exploring inclusion at the individual or interpersonal/group level. While inclusion was initially theorized predominantly at the organizational level (Cox & Blake, 1991; Ely & Thomas, 2001), more recent theoretical models explain inclusion at the individual or workgroup level. The individual and interpersonal levels of inclusion are also crucial in understanding the two dimensions essential to the inclusion framework: uniqueness/authenticity and belongingness (Jansen et al., 2014; Shore et al., 2011). These dimensions can be understood as how the individual feels and what interpersonal interactions reinforce those feelings. Regarding identity, uniqueness, for example, has been defined as “the need to maintain a distinctive and differentiated view of oneself” within a group, and belongingness is defined as “the need to form and maintain strong, stable interpersonal relationships” within groups (Shore et al., 2011, p. 1264).

Shore et al. (2011) defined inclusiveness within organizations as “the degree to which an employee perceives that he or she is an esteemed member of the work group through experiencing treatment that satisfies his or her needs for belongingness and uniqueness”
This theory draws on social psychology’s optimal distinctiveness theory (Brewer, 1991). Optimal distinctiveness theory explains the desire of individuals to satisfy equal needs to assimilate into and differentiate themselves from others in the context of a group. Emerging from social identity theory (Turner & Tajfel, 1986), optimal distinctiveness theory explains the desire for belongingness and uniqueness as the human need to find acceptance in a group through a sense that one is similar enough to belong while simultaneously being valued for the individual’s unique identity and contributions. In this conceptualization of inclusion, individuals seek groups where the environment allows them to balance these two conflicting needs.

Jansen et al. (2014) also saw inclusion in work groups as a two-dimensional concept that includes belongingness; however, they described the tension as existing with a need for authenticity rather than uniqueness. This model uses self-determination theory (Deci & Ryan, 1991) rather than optimal distinctiveness theory. The authors apply self-determination theory to focus on the experiences of inclusion for those in the majority in addition to those in the minority. They argued that a focus on uniqueness is less intersectional and only places value on how people are different. Authenticity, they argued, allows a more multi-faceted approach where being able to express all aspects of who a person is in relation to others is achieved. Another essential difference between the two theories is the underlying view of who is responsible for inclusion within organizations. In the inclusion theory advanced by Jansen et al. (2014), the assumption is that the group includes the individual, not the other way around.

Uniqueness or authenticity is experienced at various levels as well; this is summarized in Table 2.1.
### Table 2.1

**Workplace Identity and Self-Concept**

<table>
<thead>
<tr>
<th>Level</th>
<th>Source and Concepts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Cognitive Fluency</strong></td>
</tr>
<tr>
<td></td>
<td>“Sense of the self as “true” (Schmader &amp; Sedikides, 2018, p. 231) (authenticity)</td>
</tr>
<tr>
<td>Interpersonal</td>
<td><strong>Interpersonal Fluency</strong></td>
</tr>
<tr>
<td></td>
<td>“Ability to be oneself with others” (Schmader &amp; Sedikides, 2018, p. 233) (authenticity)</td>
</tr>
<tr>
<td>Organizational</td>
<td><strong>Motivational Fluency</strong></td>
</tr>
<tr>
<td></td>
<td>“a sense that one’s actions are self-determined” (Schmader &amp; Sedikides, 2018, p. 231) (authenticity)</td>
</tr>
</tbody>
</table>

Schmader and Sedikides (2018) described three levels of fit that are derived from environmental cues about the degree to which one can feel like their true self. The greater the fit, the greater the ease with which an individual can navigate a particular environment. At the individual level, self-concept fit is defined as occurring “when environments automatically activate the most chronically accessible (or default) aspects of the self” (Schmader & Sedikides,
2018, p. 231), or *cognitive fluency*. The environment is the source of input and feels so familiar and comfortable that there is little cognitive friction and individuals feel that they can be themselves in the environment. At the interpersonal level, the social fit is defined as “the degree to which other people in the current environment accept and validate a person’s sense of who they are” (Schmader & Sedikides, 2018, p. 233). Interactions with others signal to the individual that they can be themselves, thus creating *interpersonal fluency*. At the group or organizational level, goal fit is defined as “the existence of institutional structures or norms in the environment that afford (rather than impede) one’s internalized goals” (Schmader & Sedikides, 2018, p. 232).

The more an individual’s goals are aligned with the environment, the more motivated they will be because they have a sense of self-determination in completing the task or *motivational fluency*. Schmader and Sedikides (2018) distinguished *trait authenticity*, which derives from the fit between one’s behavior and “stable traits and values,” (p. 230) from *state authenticity*, which occurs when “aspects of the self and identity are a fit to the surrounding environment” (p. 230). These descriptions speak to the individual and interpersonal levels of inclusion within an organization.

Belongingness is also experienced at multiple levels but is more closely associated with the interpersonal level of interaction. Buengeler et al. (2018), for example, described uniqueness as a reflection of a personal or individual self-concept, while belongingness reflects an interpersonal self-concept. However, some have asserted that belongingness is tied more to the organizational level, specifically the climate and culture, than to interpersonal interactions (Slepian & Jacoby-Senghor, 2020). Buengeler et al. (2018) took a “multi-faceted and multi-level” (p. 292) view of workplace inclusion. They offered a third facet to the existing inclusion frameworks offered by Shore et al. (2011) and Jansen et al. (2014), called *collective*
**self-concept** that drives feelings of commonality. Buengeler et al. (2018) also noted that achieving this balance is challenging and involves an inherent tension: “Employee’s overall felt inclusion requires felt inclusion on multiple self-facets simultaneously . . . feeling included personally, interpersonally, and collectively will always live to some extent in tension with each other” (p. 1267). Understanding these layers of complexity and acknowledging the impact of self-concept or identity development in creating inclusion is critical.

Additional complexity is added when considering the combination of the levels at which social identity is being influenced and the intersectional nature of identity formation within the workplace. Booysen’s (2018) discussions of workplace identity “highlight[ed] its socially co-constructed and intersecting nature, its multiplicity and simultaneity” (p. 3). Individuals within organizations are constantly constructing and co-constructing their sense of self, which impacts their sense of inclusion within the workplace. Any attempts to understand what creates inclusion for an individual must also be concerned with the individual sense of self and the interpersonal and collective interactions that drive an understanding of self-concept at several levels.

Organizations do not achieve inclusion in the way that they achieve diversity. Inclusion is a practice requiring constant investment to maintain and preserve it. Everyone must also practice it at every level; otherwise, it will not be pervasive. However, the fact that it can be impacted at all levels means that everyone within an organization can be empowered to create inclusion for themselves and others. Learning how to unleash the power of inclusion is one of the goals of this inquiry, but first, the phenomenon needs to be better understood. This research follows the call from Buengeler et al. (2018) to study “the role of individuals by examining how they can
proactively co-determine inclusion with HR and leaders, thereby increasing the effectiveness of organizational inclusion efforts” (p. 301).

**Tensions in Inclusion**

Although often presented as a harmonious state, inclusion relies on tensions between competing forces. It is conceptualized as a balance between belonging and uniqueness or authenticity (Jansen et al., 2014; Shore et al., 2011). Creating this balance requires individuals, groups, leaders, and organizations to constantly juggle competing demands and interests to maintain a climate that promotes feelings of inclusion. Theories like optimal distinctiveness (Brewer, 1991) and self-determination theory (Deci & Ryan, 1991) help to explain these tensions through a psychological lens. Balancing an individual’s desire for integration into a group is theorized as being at odds with the desire to differentiate their identity or ability.

Ferdman (2017) described balancing these inherent tensions as requiring a *both/and* rather than an *either/or* approach. At the individual level, a balance must be achieved between self-expression and identity for inclusion to be experienced. At the group level, leaders and groups must balance the desire for safety which relies on consistency and the known with a willingness to embrace new and different ways of being. At the organizational level, inclusion requires a culture that can adapt to allow multiple forms of expression to exist simultaneously. These tensions are managed across these levels and within each interaction and experience. In this way, inclusion should not be understood as something fixed but as being defined, negotiated, and re-negotiated in every interaction.

The organization and the individual feel the impact of this navigation of tensions. Identity is a critical component of understanding inclusion within the organization because, just as people are shaping the organization they are in, the organization is also shaping the individuals through
their interactions. This phenomenon was conceptualized by Ortlieb et al. (2020) as a woodcarver forming a piece of wood; organizations are shaping and molding the individuals within them. The identity regulation framework (Alvesson & Willmott, 2002) also helps to understand this phenomenon. The context in which that individual operates is necessary to understand inclusion at the individual level.

The experiences form a collective identity that informs and shapes their intra- and inter-personal identities, which must all be navigated continuously (Booysen, 2018; Buengeler et al., 2018). Identity formation is fluid, not stable, so individuals adapt and make sense of their interactions at every moment. This complicates things because understanding an inclusion experience requires a complex appreciation of the experience from multiple points of view. What happens in those interactions at all levels, and how does everyone shift and adapt to provide the balance needed for inclusion to occur? Embedded within these interactions are additional tensions described by Ortlieb et al. (2020) as managed within the interaction. They include practices that enable and restrict, invite and gatekeep, and create solidarity and judgment. The complexity of these interactions must be considered in any exploration of inclusion as a psychological state.

Social identity is one of many characteristics involved in these interactions (Tajfel, 1978). When social identity is a point of difference within the interaction, it provides a unique context to understand the factors at play. It heightens the dynamics in the exchange because it provides the basis for inclusion at the individual level. However, few studies have taken an intersectional lens to the study of the experience of identity on inclusion. For example, Slepian and Jacoby-Senghor (2020) examined the role of identity threats which they defined as “situations that make salient a conflict between one’s current context and a marginalized identity one has”
on the psychological experience of belonging. They used multi-level modeling to measure the impact of identity threats across more than 30 identities simultaneously, making the results more generalizable across a more comprehensive array of identities and contexts. The findings of this study demonstrated a connection between a sense of belonging and authenticity. However, Slepian and Jacoby-Senghor concluded that belonging is driven more by the culture within the organization and clues individuals get about whether their identity is a fit than interpersonal interactions. They also found that identity centrality (the degree to which one’s identity is connected to their self-concept) predicted a lack of belonging in experiences of exclusion—the more central the identity that was threatened, the more an individual felt excluded and that they did not belong.

Does identity centrality also influence a perceived sense of inclusion? If identity threats reduce identity centrality, can identity affirmations, referred to in the literature as authentic affirmations (Morgan Roberts et al., 2009) or self or group affirmations (Derks et al., 2009), increase identity centrality? The limited qualitative exploration of the experiences that lead to a psychological sense of inclusion makes it hard to theorize about this connection. However, my research provides some insight into a possible relationship.

Critical Inclusion Theory

The rise of critical inclusion theory is a welcome and necessary addition to the inclusion literature. Organizational approaches to the creation of an inclusive climate or culture are primarily described as a one size fits all approach (Adamson et al., 2021). However, individual perceptions of inclusion within organizations are not monolithic. Individuals experience inclusion in different ways that are impacted by many factors including social identity and power dynamics (Ferdman, 2017; Ortlieb et al., 2020; Purdie-Greenway & Davidson, 2019). These
factors have been largely ignored in descriptions of the importance of inclusion within organizations. The emergence of critical views of inclusion theory has allowed for this kind of examination. Scholars in this area argue that it is critical to examine how inclusion is created and experienced to begin to assess the impact various approaches to inclusion have on individuals within organizations. For example, Purdie-Greenway and Davidson (2019) encouraged organizations to design for “Black inclusion,” acknowledging these differences by adding practices that have been shown to specifically address the development needs of African Americans. The lack of understanding about the psychological mechanisms (Shore et al., 2011) driving inclusion limits our ability to link organizational practices to the ways in which those practices impact individuals across different identity groups (Sleipan & Jacoby-Senghor, 2020) and the price they pay to experience inclusion.

Cost of Inclusion

The literature offers several examples of negative outcomes of inclusive practices, specifically for individuals in minoritized groups within organizations. The cost of inclusion is connected to the ways individuals navigate the tensions between authenticity and belongingness (Ferdman, 2017). Inclusion requires individuals to “add value in some way to the organization, be willing to accommodate cultural norms and make the ‘right’ choices” (Tyler, 2019) as a condition of inclusion. These conditions set up an obstacle course of contradictions that individuals must navigate to achieve the experience of belonging (Ferdman, 2017). In particular, those in minoritized groups, are often called upon to sacrifice parts of their identity or limit their group membership to achieve inclusion (Schmader & Sedikides, 2018), and these choices come at a cost to self-esteem or motivation (Derks et al., 2009). While a balance between authenticity
and belonging is encouraged to achieve inclusion the question remains as to who is allowed to be
authentic within an organization and who decides who belongs.

McCluney and Rabelo (2019) critiqued the inclusion framework stating that the desire for
uniqueness and belonging creates conditions of invisibility that “dictate and distort how
marginalized employees are perceived, evaluated, and relegated” (p. 144). Using an
intersectional lens, they described levels of exposure—from hyper-visibility to invisibility—that
showed the desire for inclusion among Black women within organizations where they are in a
minoritized group.

Hewlin (2003) described the cost associated with inclusion as deriving from the creation
of *facades of conformity* defined as “false representations created by employees to appear as if
they embrace organizational values” (p. 634). Conformity is perceived by study participants, all
African Americans in the legal field, as a necessary condition to establish credibility and achieve
advancement opportunities. The weight of inauthenticity is detrimental to the creation of
personal relationships which help to create opportunities for advancement. In a similar study of
African Americans in the finance industry, Sims et al. (2019) described the “illusion of
inclusion” that hides a “widening gap between the way organizations market and promote
diversity and the realities of day-to-day work life” (p. 213) for certain employees. These
employees described a constant battle to establish credibility despite possessing the experience,
credentials, and confidence to inhabit leadership roles. In addition, the hypervisibility and outlier
status many of these employees feel as one of few at their level was described as driving
complacency within the organization to advance inclusion or diversity demonstrating the cost to
the organization.
Identity is the frame through which the cost to inclusion is primarily assessed but other factors dictate who pays the price for inclusion. Power dynamics are also a critical factor for organizations to consider when examining the cost of inclusion. Ortlieb et al. (2020) acknowledged that the organization has an impact on an individual’s identity, and they described inclusion as “a process that involves various actors and practices embedded in organizational power relations and societal discourses” (p. 267). The organization, and those in power within it, exert tremendous influence over the ways in which employees are allowed to present within the organization. The employee is under more pressure to conform than leaders within the group or organization creating an imbalance in terms of the effort that must be exerted to achieve inclusion.

**Gaps in Critical Inclusion Theory**

Critical inclusion theory is nascent and there is a lot of room for additional exploration of the costs associated with the creation of inclusion within organizations to individuals and to the organization. Marginalized groups are often the target of inclusion efforts, and there is a lack of understanding of how these groups adapt and adjust to experience inclusion and how they experience the practices meant to include them. There is also a centering of the group and the organization in terms of who does the including that bear examination. Finally, the costs are not only to the individual but also to the organization which can inadvertently create exclusive cultures in an attempt to include others (Jansen et al., 2014; Sims et al., 2019). In examining the experiences of inclusion for professional staff, it is crucial to look for the ways in which the individual may have paid a price to experience that psychological state. In what ways did the individual have to adjust or amend their sense of self or navigate power dynamics or other
inherent tensions to achieve a sense of inclusion? In what ways did the organization or the group adapt to make it possible for inclusion to occur?

**Inclusion in Higher Education**

Inclusion is a popular word and concept on university campuses. The word often describes an ideal state—inclusive excellence, inclusive pedagogy, and inclusive classroom environment. Inclusion in an educational context originated in the discussion of universal design and adaptive learning for students with disabilities (Ryan, 2006). The shift to diversity from equal employment opportunity paradigms (Ely & Thomas, 2001) brought the term into a new meaning that describes conditions under which everyone feels a sense of belonging on campus. That shift has created a push to make inclusion a central part of diversity planning, understood as the ideal condition if diversity is truly valued. In 2005 the Association of American Colleges and Universities commissioned a series of white papers to launch a campaign focused on inclusion in higher education (Clayton-Pederson et al., 2007) At the outset of this initiative, the association advanced an operational definition of inclusion that has become extremely popular across higher education called inclusive excellence. The definition is flexible enough to be localized to a campus while retaining basic principles to guide a national movement and connect campuses in these efforts. The definition consists of four primary elements; a focus on student intellectual and social development, the purposeful development and utilization of organizational resources to enhance student learning, a recognition of the cultural differences that learners bring to the educational experience, and that enhances the enterprise and the development of a welcoming community that engages all of its diversity in the service of student and organizational learning. In the foundational paper, “Making Excellence Inclusive,” Clayton-Pederson et al. (2007) wrote, “The resulting framework, perhaps most importantly, helps campus leaders focus simultaneously
on the “big picture”—an academy that systematically leverages diversity for student learning and institutional excellence—and the myriad individual pieces that contribute to that picture” (p. 1). In this description it is evident that students and not employees were the central focus of efforts to create an inclusive environment. While most higher education institutions have adapted this framework to include employees’ experience, the working definition in higher education remains underdeveloped for understanding what it means for staff to experience inclusion.

Higher education is a complex environment with different subcultures and expectations coexisting within one organization. This concept was captured by Kerr (1963/1982), who presciently described the modern university as a “multiversity” (p. 1), an organization comprising many communities all competing for influence and coming together only fleetingly when interests align. When compared to more hierarchical, linearly structured corporate environments, universities are more loosely coupled structures (Weick, 1976) that retain a certain amount of independence internally even as they work together towards a similar goal and work (Prilleltensky et al., 2020; Smerek, 2010; Tierney, 2008).

**Culture in Higher Education**

The complexity within universities is reflected in the culture, which is diffused across all stakeholders. A common framework for examining university culture is to view it through one of three perspectives: integration, differentiation, and fragmentation (Martin et al., 2006; Smerek, 2010). The integration perspective describes an idealized view of higher education. It assumes consistency in objectives and goals across the entire organization and that everyone shares a similar cultural experience. A list of values is often shared in campus-wide communications and includes calls to create an inclusive campus culture that assumes integration of all parts of the
campus. However, this view ignores the reality of competing priorities and the diversity of experiences across campus stakeholders.

The second view of institutional culture is differentiation. This assumes that cultures are defined, and goals are established within sub-groups. In this view, individuals come together across similar categories like students, administrative staff, or faculty and within categories like specific faculty departments or professional roles. Power and influence are not concentrated within one central system or individual leader but are manifested within subgroups. This view allows for some alignment between groups but does not require alignment across all groups for the university to function effectively.

In the third view, fragmentation, there are only temporary groupings based on specific goals like task forces, classes, or work groups. Culture and goals are defined within each separate group, and influence is exerted within the group. This view sees university culture as in a constant state of ambiguity, never fully defined and constantly shifting depending on what group the individual belongs to.

In understanding administrative staff and their experiences of inclusion within the university context, it is helpful to look for elements of differentiated and fragmented perspectives. Experiences of inclusion may be a result of identity within a specific subgroup or in terms of participation in a temporary grouping or assignment. A staff member may not feel a sense of inclusion within their department but may find a sense of belonging and authenticity because of their involvement in an affinity group or as a participant in a cross-functional team. It is essential to understand which cultural experience has the most impact on the individual’s experience within the larger organization.
Many of the studies of higher education that involve administrative staff use a differentiation perspective. For example, this perspective is common in the concentration of studies within fields like student affairs (Harris, 2019; Marcus, 2000; Sánchez et al., 2020). These studies see a common culture and understanding among professionals who work to provide support to students outside of the classroom. These studies assume a common culture and career paths and focus on how individuals with different identities experience tensions or challenges to success within these contexts, not the university overall.

A second perspective using the differentiation perspective is the studies that compare and contrast the culture, values, and ideologies of academic and administrative staff (C. L. Cameron, 2020; Smerek, 2010). These studies take a similar view that culture exists within subgroups and that individuals will experience the university differently depending on their role within the organization. These studies found a tension between these subgroups, with staff described as focused on efficiency and the bottom line while faculty are focused on creating and disseminating knowledge. Similarly, there are descriptions of faculty as valuing autonomy and independence, while staff are described as valuing collaboration. These differences help explain why a focus on staff, who are underrepresented in the higher education literature, may reveal new perspectives regarding the experiences of inclusion within higher education.

Studies of higher education that take a fragmented view focus primarily on the experiences of students or faculty (Hurtado et al., 2015; Vázquez-Montilla et al., 2012). They concentrate on the individual nature of research and the loyalty faculty feel to their disciplines rather than to their departments or the university more broadly (Silver, 2003; Smerek, 2010). There is an opportunity to look at administrative staff through this fragmented perspective and see what drives the difference in experiences of inclusion for this group.
Few studies of higher education rely on the integration perspective. This perspective may prove to be too simplistic for the very complex structures present in higher education (Silver, 2003; Smerek, 2010). In addition, the complexity of social identity and the different ways individuals experience an organization’s culture depending on that identity are not factored into integrative interpretations of culture. In the integrative view, the focus is on organizational identity and a sense that everyone, regardless of social identity, experiences the culture similarly.

In differentiation or fragmentation approaches, there is a possibility for allowing one of the subgroups or couplings to be associated with identity groups, not just professional or disciplinary groups. This nuance is crucial because studies of inclusion that attempt to use the integrative perspective to name one university-wide practice or experience that leads to feelings of belonging and authenticity may miss the impact of diverse identities on that experience. Allowing for more loosely defined descriptions of experiences and the context of those experiences may allow a more robust understanding of the nature of the experience. Removing the assumption that the university has a shared culture allows for more complexity in understanding how individuals navigate the organization and all of the possibilities for inclusion to manifest at different levels and different times during an individual’s experience (Smith, 2020). Inclusion is often described as fixed and binary, but it is best understood as transitory, occurring periodically or sporadically depending on where and when the experience of inclusion occurs.

**Social Identity in Higher Education**

The role of social identity in higher education is a common theme in research (Barnett, 2013; Howard & Davies, 2013; Tajfel, 1978) but, like all research in this industry, tends to focus primarily on students and faculty (Smith, 2020). Where it is studied for academic and
administrative employees, the focus is on studies of how social identity limits participation and advancement. In these studies, employees from marginalized identity groups are found to be less likely to feel the climate is supportive of diversity and have a lower sense of belonging (Harris, 2019; Marcus, 2000; Mayhew et al., 2006; Sánchez et al., 2020). Few studies have explored positive experiences of social identity. However, when they do, they find a sense of belonging is driven by positive feelings about identity, primarily where identity is used to create positive experiences for others (Vázquez-Montilla et al., 2012).

**Professional Staff in Higher Education**

Professional or administrative staff are less researched than academic staff or faculty (Harris, 2019; Marcus, 2000; Riffe & Barringer, 2021; Sánchez et al., 2020; Smith, 2020). There are a variety of terms used to describe this group, including administrative workers (Szekeres, 2004), non-academic employees (Curran & Prottas, 2017; Riffe & Barringer, 2021), support professionals (C. L. Cameron, 2020), or simply “staff” (Mayhew et al., 2006). A common way of identifying these employees is by their work, which focuses on administrative tasks instead of research or teaching (C. L. Cameron, 2020; Curran & Prottas, 2017; Szekeres, 2004). In this view, professional staff are primarily seen as supporting faculty and students directly or indirectly through administrative tasks like finance or marketing. This view is limiting because these employees are only studied and described in terms of their contributions to the experiences of faculty or students and are not seen as the object of inquiry (Curran & Prottas, 2017; Graham, 2012). One stream of research identifies another category of employees described as “third-space professionals” (Whitchurch, 2012) who occupy a middle ground between academic and administrative roles. Employees in this category are described as “unbounded,” participating in academic and administrative tasks (Akerman, 2020).
Often when professional staff are studied, it is in relation to academic staff and the differences between the two groups. Professional staff describe feeling invisible to and experiencing lower self-esteem than academic staff. This is attributable to several factors, including the indirect nature of their work, the prevalence of women in these roles, or the value that is placed on research and teaching within higher education institutions (Akerman, 2020; Szekeres, 2004). There is also a negative association with professional staff that derives from the growth of corporatization in higher education, causing a proliferation of these non-academic roles (Szekeres, 2004). However, a general theme is that whether direct or indirect, professional staff play an essential role in the student experience (Curran & Prottas, 2017; Graham, 2012).

There is little research on the concept of inclusion in a higher education context as defined by Shore et al. (2011) and Jansen et al. (2014). However, there is research on related concepts like the sense of belonging and mattering. Sense of belonging has been a popular research topic for the student experience in higher education. A substantial body of literature examines this group’s sense of belonging (Hurtado & Carter, 1997; Strayhorn, 2019). In these studies, sense of belonging is experienced by students as a feeling of connectedness, support, or validation (Maestas et al., 2007; Strayhorn, 2019) and impacts persistence (Hausmann et al., 2009; O’Keefe, 2013) and success (Strayhorn, 2019). The importance of mentoring is also a common theme in studies of a sense of belonging for students (Holloway-Friesen, 2019; Salinas et al., 2020; Torrens et al., 2017). There is significantly less written about the sense of belonging for employees, and literature and research that does exist focuses on faculty (Vázquez-Montilla et al., 2012; Wright-Mair, 2020).

Mattering has also more recently been explored within higher education. While not the same as inclusion, the concept is similar, defined as the experience of feeling valued by self and
others and adding value to self and others (Prilleltensky et al., 2020). In a study of employees’ perceptions of the culture of mattering within work units at a university, perceptions were studied at three levels of interaction: the supervisor, colleagues, and the organization (Prilleltansky et al., 2020). The findings revealed that employees can experience varying degrees of mattering depending on the level of analysis. For example, employees may feel they matter because of interactions with colleagues rather than across the organization or with their supervisor. This speaks to the importance of examining concepts like mattering or belonging, or inclusion across multiple levels.

**Gaps in Inclusion in Higher Education**

There has been an increase in studies of the effects of what many refer to as the privatization or growth of neoliberalism in higher education. This shift in the academy has been characterized by redefining students as consumers, in the increase in dense administrative hierarchies, the proliferation of contracted services, and the commercialization of research as a result of patents and copyrights. The impact on the employee base of higher education institutions is equally profound and includes the dramatic shift to more contingent workers among the faculty, the increasing reliance on graduate students and post-doctoral workers, and a spike in the numbers of non-academic workers. Roles once occupied by full-time tenured or tenure-track faculty have been unbundled (Kezar et al., 2019) and given to professional staff or contingent workers who do not receive premium salaries. These employees can be influenced outside the shared governance models that once typified the higher education leadership model. For example, advising students is often performed by academic services, and graduate students or contingent workers are handling more and more instruction and assessment.
Described as the “Gig Academy” (Kezar et al., 2019, book title), this shift to reliance on professional staff makes focusing on these employees even more critical. These workers used to have enhanced benefits like tuition remission and flexible work arrangements, but that has been eroded. A shift has also occurred to more contingent and less flexible environments. Many employees persist, however, because of a strongly felt connection to the organization’s mission and a desire to serve students. Professional staff in this environment have become disconnected from the university and “have gone from feeling like part of a community in which they were connected to the faculty, staff, and students to feeling they are no longer respected or even visible and increasingly under the thumb of corporate administrators” (Kezar et al., 2019, p. 37).

This feeling has been exacerbated by the pandemic, which has inflamed tensions between employees and the administration over safe working conditions and fair labor practices. Vaccine requirements, mask mandates, and in-person teaching expectations vary from state to state and institution to institution. They have caused disruptions as negotiations over implementing these new regulations are changed each semester. On residential campuses, efforts to care for infected or exposed students have created potentially hazardous working conditions for frontline employees like health center employees, facilities staff, and residence life employees. Concerns about well-being have increased as employees show signs of languishing or burnout, and student mental health issues increase. Declines in enrollment have driven cost-cutting measures, which have reduced opportunities for contract employees like adjunct workers and food service employees. Nevertheless, the endowments at most private institutions increased dramatically in the fiscal year 2021 (Whitford, 2021), causing many to wonder if the mission of higher education is still to create and disseminate knowledge.
Amid these challenges, it is surprising that there has not been more attention paid to the experiences of professional staff. Once again, there have been abundant research studies and papers about the concerns of students (Clabaugh et al., 2021; Lederer et al., 2021; Van de Velde et al., 2021) and faculty (Shen & Slater, 2021; Tugend, 2020) but very little that reflects the experiences of professional staff. My research has allowed professional staff to share their experiences of inclusion in the context of these shifts in the higher education landscape. The incidents collected add to the knowledge of the creation of inclusive cultures and climates within higher education by examining the experiences of professional staff and using those insights to consider how these employees can be encouraged to shape the environment in more inclusive ways.

**Positive Organizational Scholarship**

The majority of organizational diversity, equity, and inclusion (DEI) research is focused on exploring the challenges of those who are marginalized or on the difficulties organizations and leaders have in managing an increasingly diverse employee base. There have been calls recently to shift the lens through which DEI research is conducted to include the examination of the conditions and experiences that enable positive growth and development as well (Morgan Roberts et al., 2015; Ramarajan & Thomas, 2011). My study design heeded this call to use positive organizational scholarship as a framework for inquiry. The assumption guiding this work has been that focusing on the experiences that lead to a sense of inclusion instead of exclusion will help uncover the more generative moments of DEI practice within organizations.

Positive organizational scholarship (POS) is the study of the positive phenomenon within organizations. The focus in POS is not simply on the good but on leaving room within the examination of a topic for “the enablers (e.g., processes, capabilities, structures, methods), the
motivations (e.g., unselfish, altruistic contribution without regard to self), and the outcomes or effects (e.g., vitality, meaningfulness, exhilaration, high quality relationships) associated with positive phenomena” (K. S. Cameron et al., 2003, p. 3). Similar to positive psychology (Seligman & Csikszentmihalyi, 2000), POS brings a positive orientation to the study of organizations by providing a means of expanding on existing theories in ways that acknowledges the more positive practices and behaviors that occur. At its core, POS is about improving organizations and the people within them, using concepts like flourishing and thriving to describe the explored outcomes. POS research is described as “organizational research occurring and macro levels which points to unanswered questions about what processes, states, and conditions are important in explaining individual and collective flourishing” (K. S. Cameron & Spreitzer, 2012, p. 2). POS research approaches assume that studying positive experiences can provide as much learning about how to enhance organizational behavior as studying experiences where things go wrong or where a process has failed.

Four approaches or scholarly domains characterize POS (K. S. Cameron & Spreitzer, 2012). One is to focus on seeing events in a positive light. In higher education, the focus on strengths-based leadership and development (Rath & Conchie, 2008) is an excellent example of this approach. A second approach is to examine or to look for the best in the human condition. This approach focuses on virtuousness in the individual behaviors of people within an organization. A third approach is to focus on positive deviance within an organization. The researcher seeks experiences that fall outside of the norm of what is expected—but in a positive way. The fourth approach is to examine positive experiences that create enhanced outcomes for individuals within the organization.
Elements of all of these domains were present in the experiences captured during this research study. However, the domains that influenced the current research design are the last two, which seek to identify and examine the significant experiences of inclusion (those moments that fall outside the norm) that create a sense of inclusion for the individuals. By examining the critical moments of inclusion, this study searched for and elevated positive deviance within the organization. These unusual moments allow the individual employee to flourish, and equally as important, support the flourishing of the group and the organization.

**Ubuntu Inclusion**

Ubuntu is a philosophy or worldview that originates in the African language and culture. No central definition of Ubuntu exists because it is interpreted in various ways, but at its core, the concept brings together the individual and the communal. Mnyaka and Motlhabi (2005) described Ubuntu as reflecting the idea that “the value and dignity of persons is best realized in relationships with others” (p. 221). Belonging to a community is core to this description of Ubuntu and runs counter to the notion of the individual as autonomous. Ubuntu decenters the individual and defines identity in relation to the collective as personified by the literal translation of the phrase “I am because of others.” In the context of organizational inclusion theory, Ubuntu is practiced as a “positive generative and relational leadership practice” (Booysen, 2015). It complements the call for more positive organizational approaches to inclusive leadership within organizations.

This philosophy was the foundation of a model called *Ubuntic inclusion* developed by Goosby Smith and Lindsay (2014) based on nearly 7,000 interviews with employees in various organizational settings. The model, comprised of eight themes, was the result of centering individual incidents of inclusion within the group rather than defining inclusion through the
practices of the leader or policies of the organization. In this way, the methodology is rare in that it explored individual peak moments of inclusion experienced by employees to understand the experience of inclusion more broadly within organizations.

One of the authors, Goosby Smith (2021) subsequently applied the model to a research project within a military setting and found great applicability. Goosby Smith’s study is one of few that use a qualitative methodological approach to defining the psychological experience of inclusion. The study used a more generative approach to considering the experiences of inclusion by asking about peak moments or significant positive experiences within the workplace context. My research was inspired by this study exploring peak moments of inclusion at work, defined as “a time when they really felt that they belonged and that they mattered” (Goosby Smith, 2021, p. 254). The combination of a positive organizational approach to inclusion research and an emphasis on the communal aspect of self-concept through the use of Ubuntu inspired the current research design, which takes a similar approach in the higher education context. A description of the methodology and research design follows in Chapter III.
CHAPTER III: METHODOLOGY

Organizational cultures emerge through a process of sensemaking (Weick, 1995) at multiple levels. Individuals make meaning of the experiences and interactions they have in the context of their environment and the collective perception of these experiences help to inform the ways people act or enact the culture within their work groups or teams. Experiences of sensemaking occur when something out of the ordinary happens in the environment forcing individuals or groups to make meaning of the deviance from what is expected (Weick et al., 2005). Although it is the negative experiences that get most of the attention in organizational research, positive deviance in organizational environments can also be fertile ground for understanding how to enhance organizational climate and culture (Lavine, 2011). Unfortunately, in many organizations, inclusion is not the norm, so when an experience occurs that makes someone feel included it can be viewed as a positive deviance and allows room for interpretation. This research study explores these moments of positive deviance by creating the space for professional staff in higher education to reflect on and make sense of these significant moments of inclusion within their workplace.

The psychological experience of inclusion in an organizational context is not well understood and has not been explored in higher education among professional staff. There is more written about the experiences of exclusion among this population and less about positive experiences that lead to a sense of belonging within the workplace. Using positive organizational scholarship (K. S. Cameron & Spreitzer, 2012) as a framework, this research provides much needed perspective on the experiences that lead to more positive experiences and outcomes. The study was meant to elevate the experiences of an often-overlooked population in higher education—professional staff.
For this research, individuals who identify as professional staff were asked to engage in a sensemaking process (Weick, 1995) about the significant experiences that generated feelings of inclusion within their workplace. A constructivist epistemological approach—which holds that instead of one truth there are many truths that are established by the individual and their interpretation of the event—guided this research process which sought to answer the following research questions (RQs):

- RQ1: What are the critical moments that create a sense of inclusion for professional staff in higher education institutions?
- RQ2: At what levels in the organization are these incidents occurring?
- RQ3: How do these critical moments of inclusion impact professional staff member’s self-concept in their organization?

Exploring the lived experiences of a phenomenon, like inclusion, is best accomplished using qualitative methods (Creswell & Creswell, 2017). The choice of a qualitative methodology for this research effort was made with an understanding that the psychological experience of inclusion is best understood when examined across multiple levels (Booysen, 2018; Buengeler et al., 2018; Ferdman, 2014; Pringle & Ryan, 2015; Schmader & Sedikides, 2018). The lived experience of a phenomenon can be thought of as existing primarily at the individual level, however, inclusion is relational and to understand an individual’s lived experiences of inclusion requires also seeking to understand the interpersonal or group level of interaction within the organization.

Inclusion is a temporal experience that can occur in a variety of contexts and across many different interactions, meaning an individual could have multiple experiences with inclusion within a given day. Selecting a research methodology that could incorporate these levels and
factors was essential. Critical incident technique (CIT; Flanagan, 1954) is a methodological approach that provides both the narrative and the context necessary to understand this phenomenon, especially if the inquiry is anchored on peak moments of inclusion.

In this chapter, the history and evolution of CIT will be detailed and the use of CIT as a methodology explored. A review of the use of CIT in organizational research and higher education settings is also presented. An overview of the research methods used in this study is made and its advantages and limitations of this research are presented. My positionality and an overview of the epistemological approach will also be described.

**Critical Incident Technique**

CIT has changed significantly from its initial introduction and use by Flanagan (1954). The technique was created to explore the positive and negative experiences of aviation pilots in the United States Army Air Force (Flanagan, 1947). Research at the time was dominated by positivist approaches that favored quantitative inquiry. The emergence of the CIT, which introduced a more scientific approach to the observation and analysis of incident, has helped to bring a more positivist approach to qualitative inquiry.

CIT has evolved substantially since it was created. Originally used in industrial and organizational psychology, the emergence of the technique in counseling 20 years later marked the beginning of a shift in the application (Butterfield et al., 2005). The use of the technique became more expansive and changed from a primarily descriptive to an exploratory method. Researchers were encouraged to use CIT in a wide array of counseling contexts including foundational and exploratory work, especially research that would lead to theory or model-building (Woolsey, 1986).
As originally conceived and practiced, CIT was objective and positivist, but the shift to use in the social sciences marked a change in its application to a more inductive approach. This was marked by the use of retrospective self-report or remembrances of an incident instead of direct observable incidents. As the methodology came to be used across a broader array of disciplinary research including healthcare, psychology, and marketing (Gremler, 2004; Roos, 2002), it continued to evolve. The use of the methodology in management research has been critical to its application to study phenomena like courageous acts in support of marginalized identities in the workplace (Thoroughgood et al., 2021), leadership (Bott & Tourish, 2016), trust within organizational contexts (Butler, 1991), and entrepreneurship (Chell & Pittaway, 1998).

“In management and organizational behavior/psychology, understanding the detail of the processes and behaviors is paramount and a technique such as the CIT enables such an objective to be accomplished” (Chell, 1998, p. 69). CIT is also emerging in the field of higher education although focus has been on the experiences of students not employees (Curtis et al., 2015; Douglas et al., 2009; Fraser & Hunt, 2011; Holloway & Schwartz, 2014).

The methodology has also expanded the ways that credibility and trustworthiness of the data and findings are established. Researchers have developed best practices that have enhanced the way CIT is applied including independent extraction of themes, participant cross-checking through follow-up interviews, expert reviews of categories, and descriptive validity checks (Butterfield et al., 2005). This evolution of CIT to what is now referred to as “enhanced critical incident technique” (ECIT; Butterfield et al., 2009, article title) has helped CIT to be viewed more clearly as a methodology with its own series of rules and guidelines that constitute an approach to research, not simply a method or technique that is used in the course of researching a specific topic (Viergever, 2019). The factors that distinguish a qualitative methodology, as
defined by Creswell (1998), including a focus on critical events, data collection primarily through interviews, and the use of narrative form are all present with CIT. Despite this, many studies use or describe CIT as a technique more than a methodology and it is often paired with more established methodological approaches, like case study or grounded theory (Curtis et al., 2015; Douglas et al., 2009; Fraser & Hunt, 2011). In the context of this research, CIT is viewed and used as a methodology with a clear set of steps and best practices that inform the process.

**CIT for Research on Higher Education**

CIT has become more common in higher education research (Holloway & Schwartz, 2014; Moores & Popadiuk, 2011; Voss et al., 2010) but is still an underutilized methodology in this field, especially in regard to staff. The focus of CIT inquiry there has been primarily to explore the interactions between students and faculty and more generally to understand the factors that drive student satisfaction (Douglas et al., 2009). Vianden (2012) advocates for the methodology to be adapted for use in student affairs and offers several suggestions for use with professional staff including assessing training needs, exploring the development of marginalized professionals, and performance evaluations.

In several higher education studies that used CIT, it was described as a method of data collection not an overall methodology (e.g., Curtis et al., 2015; Douglas et al., 2009; Fraser & Hunt, 2011), but instead paired with a variety of methodological approaches. Curtis et al. (2015), for example, paired CIT with Kaupapa Maori research methodology that centers respect and understanding of unique cultural norms and beliefs in the research process. Fraser and Hunt (2011) used CIT to study one critical incident within a university and how it shaped interventions focused on faculty recruitment. And in another study, Douglas et al. (2009) embedded open ended questions in a qualitative survey and analyzes the responses using CIT. The variety of uses
of CIT across these studies demonstrates the flexibility of CIT as a method and speaks to the opportunity to expand its use as a methodology across higher education.

**CIT Methodological Approach**

A key feature of the CIT methodology is the flexibility that it provides the researcher. There are few prescribed rules on how data must be collected or analyzed. When CIT is used as a method of data collection this is especially so as incidents may be elicited through interviews, journal entries, or online surveys. When CIT is used as a methodology, there are five common elements that distinguish it from other approaches (Butterfield et al., 2009; Viergever, 2019).

The major steps generally agreed to define a CIT study are as follows:

1. Determining the aim of the study.
2. Designing the approach to the study.
3. Data collection.
4. Analyzing the data.
5. Interpreting the data.

The first step in the CIT approach is to determine the focus or aim of the research. To accomplish this the researcher must determine the domain, research question, and appropriate method of data collection. These elements help to identify the overall objective of the research. The objective of my research was to gain a deeper understanding of the psychological experience of inclusion in the workplace by exploring significant moments of inclusion experienced by professional staff in higher education conceptualized as moments, experiences, or interactions that caused individuals to feel a sense of belonging and uniqueness or authenticity at work (Jansen et al., 2014; Shore et al., 2011).
The second step with CIT is to establish the specifications for the study. The specific incidents to be explored are defined and a plan is created to elicit these experiences during the interview or survey. The focus of my study is on significant moments of inclusion as defined by the research participants. Rather than asking professional staff to describe what inclusion means to them or to share what it felt like to be included, CIT allows a focus on the experiences that created the feeling of inclusion. In one-on-one interviews, participants were prompted to talk about as many as four experiences that generated a feeling of inclusion in the workplace. In addition to exploring these critical incidents, the participant was asked to share about the context surrounding the incident, including what preceded and resulted from the incident. CIT also allows for exploration of wish list items—things that may be relevant to the development of a theory based on the phenomenon being explored. In this study the level at which the incident occurred, the persons involved in the incident, and when the incident occurred—were explored to determine to what degree they impacted how these critical incidents are perceived.

The third step in the CIT approach is to collect the data. CIT is often used as an exploratory method to understand psychological concepts. Qualitative methods like interviewing, are therefore the common way of collecting data as they allow for a more constructivist approach to the phenomena. To explore the experience of inclusion among professional staff, I used interviewing for data collection. Participants were asked identical questions and were prompted to share up to four experiences that generated a sense of inclusion in their workplace. Interviews were conducted until it was clear that no new insight was being gained from the incidents shared in these conversations. This is described as exhaustiveness (Flanagan, 1954) or saturation (Creswell, 2008). The incident, not the interview, is the focus of the inquiry in CIT, so saturation
was reached when new categories of incidents stopped being discovered, rather than when a certain number of interviews were conducted.

The fourth step in the CIT approach is data analysis. In CIT this relies on organizing the interview transcripts, identifying the critical incidents and wish list items in the interview text, and creating categories based on the information that emerges from the interviews. The data in this study was organized and analyzed using Dedoose, a computer program that helps to identify and sort codes that emerge during the analysis and allows the researcher to link codes to specific passages in the text of the interview. The interviews are then transcribed, and the researcher identifies the segments of the interview where separate incidents are described. The transcript is then divided into separate files that contain the incidents.

This is one of the distinct features of CIT because the unit of analysis is the incident not the entire interview. At this stage, it is important to clearly define the experience the researcher is focused on so that incidents are easily identified and drawn from the full interview record. The researcher also needs to pay attention to the context in which the incident is taking place. Antecedents and outcomes are identified for the discrete incidents. The researcher then begins to add codes to important statements that emerge from the text. At this stage, the researcher also looks for and codes any comments related to wish list items that are being explored. In this research study for example, any discussion of the levels at which the incidents are occurring, or of the ways participants make sense of their own self-identity, were labelled for reference in the analysis phase. These labels were then explored to identify themes and connect similar experiences to form categories.

The final step in CIT is interpretation of the data. Although established throughout the process, the final stages of analysis and interpretation are where credibility and transferability are
determined. The approach to analysis in this study followed a constructivist/interpretivist paradigm and was influenced by the methods used by Holloway and Schwartz (2014). Rather than using this stage of the process to force the data to conform to a predetermined theory or framework, I identified emergent themes that helped to understand the aspects of the data most central to the experience of inclusion for these participants. The professional staff being interviewed were seen as the experts because it was their unique and varied lived-experiences that provided much-needed depth of understanding about the experiences of inclusion in the higher education workplace.

A variety of validation strategies (Creswell & Poth, 2018) were used to establish credibility and trustworthiness including capturing and sharing as much descriptive data about the incidents as possible. Participants reviewed their transcripts for accuracy, working with coding partners to enhance dependability and engage in reflexive thinking to expose the researcher bias. Incorporating as many of these checks as possible added to the veracity of the data being discussed in the analysis and worked to reduce some of the criticism of this methodology.

**Advantages and Limitations of CIT**

As with any methodology, there are both benefits and challenges in using CIT to understand a psychological experience. One of the main advantages of CIT is the flexibility it allows the researcher to define the inquiry and collect the data. There are few prescribed rules when using this methodology (Butterfield et al., 2005). Enabling participants to define critical incidents in their own words is an important feature of this methodology (Kokkalis, 2007). “The CIT is exploratory by nature and is appropriate to use when the researcher is interested in learning more about little-understood events, incidents, factors, or psychological constructs”
(Butterfield et al., 2009, p. 268). CIT also allows the incidents described by participants to be placed in context giving the researcher a deeper view of the factors contributing to the phenomenon being studied (Chell, 1998). Combined with any wish list items explored in the data collection (Butterfield et al., 2009), this methodology gives researchers rich insight into the experiences of the participant.

The limitations associated with the use of this methodology are predominantly related to the data collection process. It can be time consuming to interview individuals and to analyze their narratives to find patterns and themes (Chell, 1998). The multiple perspectives and rich detail that comes from this exploration make the investment of time a necessity rather than a hindrance. CIT’s evolution from strictly observational research to including self-reported data has introduced credibility concerns that participants may not remember the incident accurately, reducing the trustworthiness of the data (Kokkalis, 2007). This perceived disadvantage has more to do with worldview than actual credibility, however, because in qualitative research methods like CIT, credibility is established through the accurate interpretation of the meaning participants make of the incident, not the accuracy of the description of the incident (Creswell & Poth, 2018).

The smaller sample sizes that are generally present in qualitative methodologies like CIT studies are also perceived as limiting the generalizability of the findings (Chell, 1998). However, the goal is not generalizability but authenticity and transferability and these can be established without large numbers of participants.

Credibility checks introduced in the extended CIT approach (Butterfield et al., 2009) are an attempt to address some of these perceived disadvantages, however, because this study used a constructivist approach, these concerns do not limit conduct of a rigorous study that yielded credible findings. The goal of a constructivist study is not to generalize the findings or to identify
a specific truth, but rather to have a deeper understanding of the many ways that individuals make sense of a phenomenon (Holloway & Schwartz, 2014). Therefore, there was no need here to use the enhanced and reductionist methods called for in extended CIT during analysis. The tangible advantages afforded by the flexibility and emergent nature of CIT outweighed any perceived disadvantages in the context of this research study.

**Epistemological Approach Underlying This Research**

Epistemology—one’s view of how knowledge is acquired and constructed—was critical to the decision to use CIT in this research. Although my experience to date has been primarily with post-positivist approaches, my background as a DEI practitioner has made it clear that there is no single objective reality when it comes to the psychological experience of inclusion. Several years ago, as an icebreaker, I began asking participants in workshops and classes to describe a time when they felt included in the workplace. I quickly noticed that the incidents they shared did not conform to just one type of experience. Instead, experiences ranged from interactions with peers and supervisors to participation in events or programs to organizational celebrations of specific identities. For every individual there was a unique interaction or experience that led to a feeling of inclusion.

These experiences helped me to understand that there is no one way to create or experience inclusion and that a search for certainty rather than clarity would be futile. Therefore, a constructivist/interpretivist paradigm was used in this research study. This approach holds that instead of one truth there are multiple truths that are constructed by the individuals experiencing the phenomena, which in this case is inclusion. A constructivist philosophy has become more common when utilizing CIT and this methodology is interactional and subjective, meaning it relies on the conversation between the researcher and the participant to construct reality. “The
interaction between researcher and participant assists in the deep reflection necessary to uncover meaning, which causes findings to be created as research takes place, blurring the distinction between epistemology and ontology” (McDaniel et al., 2020, p. 743). While gathering participants’ reflections, the researcher can come to have a greater understanding of the reality of the phenomenon being examined. To elicit these incidents, semi-structured interviews were used as the primary technique, utilizing open-ended inquiry to create the space for participants to reflect on experiences in the workplace. This cross-sectional design asked for their perceptions and then utilized the information gathered in these conversations to inform the analysis. Rather than starting with a premise about the source of inclusive moments, an inductive reasoning approach was used to analyze the critical moments that participants share. The participants inclusion informed the creation of categories and, combined with my personal experiences, informed the discoveries shared here.

**Research Stance**

DEI research often uses a critical lens because of the focus on change and transformation that drives these topics. However, as this field of research has grown, the diverse paradigms have emerged (Pringle & Booysen, 2018) allowing for a greater variety of approaches. Appreciative inquiry (Cooperrider & Whitney, 2000) was used to guide this research instead rather than a critical approach. This was an important methodological choice in constructing this study. A critical lens is often applied to inclusion research, but this study sought to uncover positive deviance, the ways that individuals are affirmed within their organizations. It built on other attempts to bridge inclusion research with positive organizational scholarship (Morgan Roberts et al., 2015).
Positive approaches to inclusion research are not typical and have been criticized by some (Ramarajan & Thomas, 2011). There is concern that a focus on positivity in inclusion research is too idealistic given the considerable challenges that exist, and the volume of work still left to be done to achieve equity and justice. However, positive results continue to emerge from inclusion research (Ramarajan & Thomas, 2011), and an explicit focus on positive approaches may contribute in significant ways to the development of the inclusion literature. Ramarajan and Thomas (2011) offer four tenets to guide positive approaches to inclusion research which align well to the design of this research study:

- First, the research should examine a phenomenon “in which identity group-based differences are thought to matter” (Ramarajan & Thomas, 2011, p. 561). My research focuses on the experiences of inclusion for employees who identify as professional staff because within a higher education context, this group has been excluded and overlooked (C. L. Cameron, 2020; Curran & Prontas, 2017), impacting the ways they experience inclusion.

- Second, the research question “must focus on an established condition of positive deviance” (Ramarajan & Thomas, 2011, p. 562). The focus on critical moments of inclusion assumes that these moments are positively deviant from the norm within higher education.

- Third, the study “must include the non-positive deviant or average condition for purposes of comparison” (Ramarajan & Thomas, 2011, p. 562). While the main focus of inquiry is on significant moments of inclusion, there is flexibility in the methodology for hearing the narratives or experiences of exclusion that did emerge during the interviews.
• Fourth, Ramarajan and Thomas (2011) suggested that researchers “treat the targeted positive deviance as a hypothesis rather than a fact” (p. 562). My interviews included follow-up questions about the context of the moment being explored to allow for this. The participants were asked about what preceded and followed these events to make room for other factors to emerge.

**Researcher Positionality**

My identity as a DEI practitioner and as a professional staff member is relevant to the current research study because the information about the significant moments of inclusion shared by participants was interpreted through those lenses. My experience working to create inclusive environments for professional staff in higher education helped them to relate to participants and impacted how they made sense of what was shared with them. I identified as a professional staff member for most of my career in higher education, so I was sensitive to the ways this group is often discounted and overlooked in a higher education context. I had been on the receiving end of questions about my competence and doubts about my status but have also experienced being invited into spaces because of unique experiences and skills. I am aware of how those critical moments can shape one’s sense of inclusion because in my role as chief diversity officer, I am responsible for creating a culture that encourages these experiences. Although I am now considered an administrator, I am still acutely aware of the experiences of exclusion occurring in their organization. As a result, I have a vested interest in also understanding the ways individuals experience inclusion because they are now in a position of influence and can help foster more of these experiences.

The approach to this research design has continued to evolve because of my worldview which most closely aligns with post-positivist epistemology and ontology. However, after a great
deal of personal reflection I realized that a constructivist approach was better suited to the research questions they chose to explore. My prior academic experience, values, and approach to making sense of the world is reflected in the definition provided by Creswell and Poth (2018): “Post positivism has the elements of being reductionistic, logical, empirical, cause-and-effect oriented, and deterministic based on a priori theories” (p. 23). I have primarily done quantitative research and seek quantifiable data whenever making decisions. In designing this research, I leaned heavily on established theories like the inclusion frameworks advanced by Shore et al. (2011) and Jansen et al. (2014) to define the phenomena I was hoping to understand. My thinking was guided by the idea that this study would provide evidence or help to prove whether these frameworks were true or not. However, I quickly realized that this study could not prove or disprove these frameworks and that my goal was not to validate the frameworks but to deepen understanding of what the concepts in these frameworks mean to individuals and how they make sense of the experiences that cause them to feel included.

This research was originally conceived as a mixed-methods study that would gather data using existing individual perceived inclusion scales, then invite a select group of survey takers to participate in an interview to provide more detail about the experiences that may have contributed to their perceptions of inclusion. Upon reflection however, I realized that the quantitative data was not the most valuable and that the narratives that would come from a qualitative approach were what was missing from the literature. My curiosity lay more in the individual experiences and perceptions of inclusion than in the quantitative ratings of the feelings associated with existing scales. I wanted to understand which experiences generated the psychological feeling of inclusion and how individuals describe not only the experiences but the ways those experiences contribute to their sense of self within the workplace. I wanted to deepen
their understanding of the levels at which inclusion was being experienced in the workplace and have a better understanding of the context surrounding these incidents.

A constructivist approach lends itself more than a post-positivist one to the exploration and interpretation of complex phenomena within a specific context and allows the researcher to rely on the perceptions of the participants. In this worldview, researchers are also invited to bring their positionality into the analysis, using their own experiences to guide the interpretation of data. The psychological experience of inclusion is complex. It occurs at multiple levels within an organization (Ferdman, 2014) and is temporal in nature: An individual might feel included in one interaction within the organization and then excluded a moment later when entering a different context or interaction. To understand these experiences calls for a philosophical approach that recognizes the importance of process and context in a way that more logical, reductionist approaches like post-positivism cannot capture. In addition, where post-positivism tends to begin with a theory, constructivist approaches to research generate theory based on the social constructions of meaning offered by participants. While it is tempting to see this as a way to prove the validity of inclusion frameworks (Jansen et al., 2014; Shore et al., 2011), what I was aiming for—and what a more constructivist approach enables—is to develop a theory based on interpretation of the data and then, see how this relates with existing theories.

The philosophy that guided this research was also influenced by the desire to establish trustworthiness of the data. My goal was not to achieve reliability and validity but rather to establish trustworthiness and credibility (Lincoln & Guba, 1985). Objectivity was not the goal; instead, it was to explore the subjective realities of professional staff members and their experiences of inclusion in the workplace. In deciding how to approach the data collection and analysis, I chose to provide for the participants opportunity for reviewing the transcripts of their
interviews before these were coded. I worked with a coding partner to cooperatively interpret the
data rather than rely on external experts and establishing thresholds for the number of incidents
to establish a code (Butterfield et al., 2009), a more post-positivist design.

**Research Design**

This research examines the lived experiences of inclusion among professional staff in
higher education. The aim of the study was to gain a deeper understanding of the psychological
experience of inclusion in the workplace by exploring significant moments of inclusion
experienced by professional staff in higher education conceptualized as moments, experiences,
or interactions that caused individuals to feel a sense of belonging and uniqueness or authenticity
at work (Jansen et al., 2014; Shore et al., 2011). Additionally, the research sought to understand
the levels at which these experiences were happening and how these critical moments of
inclusion impact professional staff member’s self-concept in their organization. This study
sought to pivot the margin (Shockley & Holloway, 2019) by elevating the often-overlooked
experiences of professional staff in higher education by centering the experience of this critical
but less researched group of employees.

**Participants**

The participants in this research study were employees who identify as professional staff
of small to medium sized four-year colleges or universities in the United States and who have
experienced a significant or meaningful experience of inclusion in their workplace. Participants
were identified through purposeful sampling, which is the most common sampling approach in
qualitative inquiry because it allows the researcher to select individuals who are best positioned
to discuss the phenomenon being studied (Creswell & Poth, 2018). A combination of snowball
and criterion-based strategies were used to identify participants through my professional and personal networks.

A variety of participant recruitment methods were utilized in three phases of recruitment. In the first phase of recruitment, a recruitment email (Appendix A) was sent to my personal network of colleagues in my current institution asking them to share a call for participation within their networks. This was done deliberately to solicit a small group of participants to allow me to become familiar with the interviewing format and the questions being asked. The email included a description of the study and the eligibility criteria as well as information about how to express interest in participating. Interested individuals who felt they met the participant criteria were asked to complete a profile form which was used to check eligibility.

I used the Carnegie Classification database (American Council on Education, 2022) to verify the institution’s size, which needed 10,000 or fewer students. The CUPA-HR classification (Bichsel et al., 2020) was used to determine if the individual was considered a professional staff member based on the job title provided. The following question was asked of potential participants in assessing their eligibility:

Have you had an experience or interaction at work that made you feel like you were included in your organization (by your workgroup)? This could be an interaction with another member of the community or an experience in the workplace that made you feel like you are part of the organization and that you are able to be yourself.

This definition and language were influenced by the perceived group inclusion scale (Jansen et al., 2014), the inclusion framework (Shore et al., 2011), and the definition of peak moments of inclusion used by Goosby Smith (2021). Individuals were considered eligible if they answered “yes” to this question, if their job title matched the CUPA-HR definition of professional staff, and their institution matched the Carnegie Classification of small and medium-sized institutions within the United States.
A total of 53 individuals completed the participant profile form to express interest in this study. Of these, 28 were determined to be eligible and invited to participate. Interviews were subsequently conducted with 23 participants. Of the original 53, 25 did not meet one or more of the three criteria or were excluded because they worked at one of the two universities with which I am affiliated. An email was sent to those who were not selected explaining why they were not eligible for participation and asking them to forward the invitation to anyone in their network who might be eligible and interested in participating.

The second phase of recruitment was much broader and, once again, included a recruitment email which was sent to the distribution lists of three professional associations of which I am a member: the New England Chapter of the National Association of Diversity Officers in Higher Education (NADOHE), the Association of Independent Colleges and Universities in Massachusetts (AICUM) chief diversity officer’s network, and the Academic Impressions Chief Diversity Officer Roundtable Network. I also designed and posted a call for participants on LinkedIn. This social media post included a description of the study and invited interested participants to complete the participant profile to express interest in participating. The post also encouraged individuals to share within their higher education networks. The post received 4,707 impressions and was reposted 9 times. The final phase of recruitment included an email to individuals in the Antioch Graduate School of Education community as well as a repost of the call for participants on LinkedIn. The second post on LinkedIn received 8,677 impressions and was reposted 52 times.

During the first and second phase of the recruitment process I observed that the demographic profile of the participants was predominantly White and male. This was an unexpected development, as I had assumed the research topic would bring out potential
participants who were more diverse in terms of race and gender. I identify as a biracial woman but am often taken to be White by others because of my name. I suspected that because all prospective participants saw was my name that they might be self-selecting in or out of the study because of their comfort or discomfort in speaking with a White person about inclusion. In social science research these kinds of biases tend to emerge during the interview process, but I wondered if common response biases like social desirability bias might be impacting the demographics of the respondents. To test this, I added my picture to the email solicitations in the third recruitment phase. While there is no way to prove causation, the individuals responding to the call for participation shifted to become predominantly Black and female during the third phase.

The goal of qualitative research is not to generalize based on the information gathered but instead to collect enough data to describe the phenomenon being explored (Creswell & Poth, 2018). In CIT, the sample size is determined based on the number of incidents identified by the participants, not the number of participants themselves. This is a crucial difference in methodological approaches because the ability to theorize about the phenomenon being studied—in this case inclusion in a higher education context—depends on the number of incidents shared. Participants were given the opportunity to share up to four incidents during the interview. The standard for incidents in the original versions of CIT called for 100 incidents. However, in constructivist CIT saturation is met when new insights cease to emerge (Holloway & Schwartz, 2014). In this study, saturation was achieved after the collection of 78 incidents during 23 interviews.
Setting Up and Interviews and Preparing Participants

Once a date and time were established for the interview, a confirmation email was sent to the participant with the date and time, a Zoom link, and a reflection exercise that the participant was encouraged to complete before the interview. My experience discussing inclusion and exclusion experiences in a work context is that it is often easier for individuals to remember times when they felt excluded more times than they felt included. When given the opportunity to consider these experiences in advance, individuals can recall more experiences and provide more detail (Bott & Tourish, 2016). The reflection exercise was developed to encourage participants to reflecting on times when they felt included in the workplace in preparation for the interview. To help guide this reflection, participants were given a series of questions to guide their reflection (Appendix D). Participants were encouraged to make notes about the incidents they recalled and to remember as many details as possible. This pre-work encouraged reflection ahead of the interview to make the conversation more effective. The notes were not shared with me or collected for the study, however, several participants referred to the exercise in the conversation and commented about how helpful it was because they found it difficult to think of times when they were included.

Data Collection: Conducting the Interviews

Semi-structured interviews were used to explore the experiences or interactions identified as significant by the study participants. To increase accessibility and convenience for participants, interviews were conducted virtually through Zoom. The purpose of the interview was to understand the nature of incidents and the factors that preceded and followed them, including the emotions experienced by the participant.
An interview protocol was designed and tested in a practice interview. The protocol (Appendix E) describes the research, explains the process, asks for permission to record, explains the participant’s rights, and details the questions to be asked to guide the interview and prompt responses from the participant. In developing this guide, I used the eight steps to guide interviews defined by Chell (1998) for CIT. A constructivist approach was used, meaning that I did not define what qualifies as a moment of inclusion but rather encouraged the participant to share the moments they recalled being significant.

The interview was structured to allow participants to share up to four moments. The interview began with questions about the participant’s work environment to provide better understanding of the nature of their workplace, who they work with, and what their job responsibilities entail. These initial questions also us to develop a rapport. Once these initial questions were covered, I asked the participant to discuss their first incident by asking the main question: “Please describe a moment, experience, or interaction you have had that made you feel included at your workplace.” Then, the following questions were asked:

- What made that moment/experience/interaction one that you remember?
- What was happening before this moment/experience/interaction occurred?
- What feelings did you experience during the moment/experience/interaction?
- What was the outcome of that moment/experience/interaction? What impact did that moment/experience/interaction have on your experience of the workplace?
- (If the experience is more of an example of exclusion, then ask) If you could change something about that moment what would it be?
- What impact, if any, did your social identity have in how you experienced this moment?
Once these questions have been asked and responded to, participants were prompted to share another significant moment of inclusion if they could recall one. All participants shared at least two incidents and the majority shared three incidents. After, I concluded the interview by asking the participants if they had anything else they wanted to share about their understanding of inclusion. While most participants did not have anything additional to add, a few did offer very thoughtful comments about how they define or think about inclusion in the workplace.

Handling the Record of the Interviews

The interview recording and automatically generated Zoom transcript were saved to my university-affiliated Zoom account. The recording was uploaded to Otter.ai, a cloud-based third-party transcription service that allows recordings of Zoom meetings to be transcribed using artificial intelligence software. Video files were converted by Otter.ai and, in less than 10 minutes, a transcript of the interviews was available for review. I then listened to the audio of the interview in the Otter.ai platform and made edits for accuracy. During this review, I also redacted the transcript to remove any identifying information including names of universities, participants’ names, and the names of any programs or people that might make this conversation identifiable.

After editing the transcript, it was exported as a Word document. The transcript was sent to the participant, and they were given one week to review the document and make any changes or edits they felt necessary. This was a critical step in the process because the participant is the only person who can assess the accuracy of the incidents shared.

Once the participant approved the use of the transcript, I identified the individual incidents and separated them into individual incident files. These files were then uploaded to Dedoose as individual records. I used the first interview to become familiar with Dedoose and
the coding process. That interview was with participant CJ, who identified four discrete incidents, numbered as 1 through 4, and labelled with the participant’s identification code (CJ). The individual Word files were then uploaded to Dedoose creating four media files. I then used line-by-line coding to review the incident and become more familiar with the Dedoose platform.

Two more interviews were then sorted into incidents, uploaded to Dedoose, and coded. The codes were reviewed, and a few small changes were made to the process based on what was emerging. This characterizes emergent design, which allows for flexibility and adaptation of the research procedures as they proceed. Holloway and Schwartz (2014) encourage coding concurrent with data collection, an approach from grounded theory called *constant comparison*. This technique makes it possible for researchers to begin to shape their interpretations of participant reflections and determine when to stop collecting data. When new codes stop emerging from the analysis of incidents and antecedents, and outcomes become repetitive, saturation is said to be achieved. Then, the researcher can feel confident that they have captured enough data (Schwartz & Holloway, 2014).

After each interview, I engaged in memoing (Saldaña, 2016)—recording my thoughts and feelings about the interviews in a Google document. This is characteristic of an interpretivist phenomenological approach to research (Smith et al., 2009), which recognizes the meaning a researcher makes of an incident as a valid part of the process. By capturing my thinking throughout the process, I was able to chronicle the evolution of my understanding of the psychological experience of inclusion in the workplace. I used these records to reflect on the process and describe the ways the design evolved.
Analysis and Interpretation

The final two steps in CIT are data analysis and data interpretation (Flanagan, 1954). Data analysis for CIT moves beyond basic thematic content analysis of the overall interview and to focus on discrete incidents that emerge from the interview. This helps to shape the steps that are taken in the analysis and interpretation of the data, which falls into three basic stages: the organization of the interviews into discrete incidents; identification of antecedents, incidents, and outcomes in the interview text; and coding of the incidents followed by the creation of categories based on the information that emerges from the analysis. The interpretation stage allows the researcher to identify organizing themes (Holloway & Schwartz, 2014) that emerge from the data and use those to offer a perspective, informed by their own lived experiences.

Data analysis in this study included three steps influenced by the constructivist CIT approach described by Holloway and Schwartz (2014). In the first step, I characterized discrete incidents by identifying the portions of the interview that met the definition put forth in this study as a significant moment of inclusion—an experience that generated a feeling of inclusion for the participant, defined as an interaction with another member of the community or an experience in the workplace that made them feel they were part of the organization and able to be themselves.

Once the individual incidents were identified and in separate files, they were uploaded to Dedoose and descriptor fields were added. In Dedoose, a descriptor field allows the researcher to label the record with characteristics to be used to analyze the record. In this study, two sets of descriptors were created. First, the demographic characteristics of the participants were entered for each incident file. There were file descriptors detailing the age, race, gender, job title,
division, internally or externally facing interactions, and primary stakeholder served. In response to several comments by participants, a demographic field was also created for career stage.

The second type of descriptor characterizes the incident in terms of its context and location, the level at which it occurred (interpersonal, group, organizational), who was involved (co-worker, student, supervisor, administrator, faculty, member), and when it occurred (less than a year, 1–5 years, 5–10 years, 11–15 years, or more than 15 years). This additional step in the analysis is described as an emerging feature of CIT that comes from a need to give additional context when using the methodology to explore the lived experiences of a phenomenon. “When using CIT to uncover psychological meanings of an event, there may be additional stages that need to be acknowledged in reporting” (Schwartz & Holloway, 2014, p. 15). A fourth field was added once incident categories were identified at the beginning of the analysis phase of the study.

The second step in the data analysis is thematically coding the antecedents, incidents, and outcomes to gain a deeper understanding of the research topic—the psychological experience of inclusion in the workplace, conceptualized as moments, experiences, or interactions that cause individuals to feel a sense of belonging and uniqueness at work (Shore et al., 2011). Emergent thematic coding (Boyatzis, 1998) was used to review the individual incidents and develop codes based on themes as they emerged from participant descriptions of the incidents. At this stage in the process, I worked with the coding partners to help push their thinking and hold them accountable to the research aims. The coding partners included a doctoral candidate who was engaged in a CIT research study and an established researcher with expertise in qualitative research. To calibrate our coding, these partners were first asked to code a batch of incidents for comparison to what I had created.
In the third stage of the process, I interpreted the data that emerged across the separate incidents looking for patterns. I first analyzed the incidents to look for common themes. Seven incident types emerged from this review and were used to categorize the incidents. I then separated these categories into themes related to the broader category and used the descriptor fields to identify any patterns in the demographics or incident categories entered.

Once the incidents were assessed I analyzed the antecedent and outcome codes. The patterns that emerge in this step of the process enabled identification of the organizing themes that drove the remainder of their analysis. Cross-comparison of incident type and themes helped to see a patterns useful in gaining a deeper understanding of the experience of inclusion for professional staff.

Finally, I used my understanding of existing frameworks and concepts related to inclusion to interpret the patterns emerging from the analysis. I asked questions of the data such as, do these incidents describe both feelings of belonging and uniqueness (Jansen et al., 2014; Shore et al., 2011)? Do these incidents speak to the ways participants develop their self-concept at work (Booysen, 2018)? How do these themes compare to existing conceptual models like Ubuntic inclusion (Smith, 2020)?

Credibility and Transferability

The constructivist qualitative approach being used in this study influenced the way credibility and rigor were established. In qualitative research, rigor and validation are viewed differently than in quantitative studies (Creswell & Poth, 2018). Instead of reliability, objectivity and validation, terms like authenticity, transferability, and dependability are considered (Lincoln & Guba, 1985). Trustworthiness is established at different stages throughout the research process. Unlike positivist approaches, this study did not aim to validate or prove a theory.
Instead, the goal was to present the data in ways that allow the reader to transfer what is discovered into other settings. Several strategies were used to establish dependability, credibility, and transferability:

- Collecting rich descriptive data in the interviews.
- Working with coding partners.
- Member-checking.
- Use of a reflective research journal.
- Discussions during the research with a peer familiar with diversity and inclusion.

Dependability was attained through the collection of rich descriptive data during the interview. By encouraging participants to reflect ahead of the interview, I made it possible for a more detailed and full description of the moments the participants share.

Working with coding partners helped to establish credibility by working collaboratively to create codes that more fully represent the data. These partners also helped me question my assumptions and keep focus on the goals of the research.

Member-checking by participants also helped to achieve reliability. All participants were sent a copy of the transcript of their interview and given the opportunity to clarify statements. This honored the contributions of the participants and afforded them an opportunity to confirm that their views and perspectives were accurately represented. This step also contributes to the richness of the data because there was an opportunity for the participant to add to or enhance the descriptions.

I kept a reflective journal during the study to capture thoughts about the process and to make note of any discoveries or observations. At the end of each of the first five interviews, I made notes about the interview process and any initial thoughts, or any emotions or meanings
made as a result of the conversation. I made notes periodically about the remaining interviews as any new insights emerged. I also memoed during the coding process to capture emerging discoveries. These steps enabled me to surface any biases and assumptions made throughout the process helping to enhance the credibility of the analysis and interpretation.

Finally, as recommended by Lincoln and Guba (1985), I also engaged in discussions on a regular basis throughout the data collection and analysis phases with a peer who was familiar with the topic of inclusion and diversity research. I have learned over the course of my doctoral studies that I am a verbal processor and, therefore, benefit from sharing thoughts and challenges on a regular basis with someone who was not immersed in the program or in the research.

**Ethical Considerations**

The physical, emotional and privacy consideration of the participants and organizations involved in this study were carefully considered in conducting the proposed research. Steps were taken throughout to minimize the risks associated with this inquiry. Before the study began, I completed the Antioch University Institutional Review Board application to identify areas of concern with respect to risks to the participants. A few changes were made in the original application such as the provision of counseling services and clarification of the privacy policies. Participation in the study was voluntary and participants were notified in writing and at the beginning of the interview that they had the right to remove themselves and their interview records at any time during the process.

At the outset, I thoroughly explained the nature of the inquiry and how incidents that emerged from these conversations would be during the process. Participants were given the opportunity to review and complete a consent form (Appendix B) that detailed the risks inherent in participating in the study, including the psychological harm that could result from recalling
incidents within their work environment. While the focus of the study was on inclusion, experiences of exclusion did emerge and recalling these could cause discomfort. One participant asked to end the recording when an experience of exclusion emerged, but, notwithstanding, wanted to share that incident with me so, the conversation continued off Zoom and the participant was reminded at the end of the interview of the resources available to them for support. Participants were given the opportunity to discontinue participation in the research study at any point, including after the interview has been concluded.

Participants shared incidents or personal experiences that happened in their current work environment. In hearing these incidents, I was privy to details about the individual and the organizations that employed them that some participants may not want to have revealed. All efforts were taken to maintain confidentiality. For example, participants were given the option to select pseudonyms for the study. Alternatively, if they did not select a pseudonym, subsequently, they were only referred to by initials. Any references made during the interview to the name of the participant’s employer, or any other college or university mentioned were removed from the interview transcript and were not referenced in the analysis or presentation of findings.

Interviews were conducted through Zoom and recorded with the participant’s permission. Participants were given the option to turn off their camera at any time during the interview. Once transcribed, Zoom recordings were deleted. All interview recordings, records, and notes were stored electronically on Antioch University servers. Transcripts were uploaded to the Otter.ai and Dedoose platforms for transcription and analysis but names were never connected to these files and the data was protected by the company’s privacy policy. No transcripts were stored on hard drives or external drives.
Chapter Summary

This chapter presented an overview of CIT and the rationale for use of this methodology, as well as its perceived advantages and disadvantages for the research. Using CIT provided a depth of understanding about the experience of inclusion in higher education that is currently unavailable. A detailed description of the research design, including the data collection and analysis methods and the ethical considerations was also shared in Chapter III. The steps taken to establish credibility, authenticity, and transferability (Creswell & Poth, 2018) were detailed. Finally, I provided insight into my positionality as a researcher, acknowledging that I am embedded in the industry and responsible for managing the phenomenon studied in this research.

The opportunity to create space through this research for professional staff to recall and share the moments that allowed them to feel a sense of inclusion in their organizations was an edifying experience. At a time when people continue to feel the weight of a global pandemic, threats to basic social justice, a worsening environmental crisis, and a deepening of mental health concerns worldwide, concentrating on an area of positive deviance seems more critical than ever. The voices of professional staff are too often overlooked and ignored, and this research worked to counter that by placing professional staff at the center. The use of CIT allowed the focus of the research to move beyond a description of what it actually feels like to be included to understand the experiences and interactions that generated that feeling. This is vital information not only for inclusion practitioners, but for anyone interested in the creation of inclusive campus environments.
CHAPTER IV: PRESENTATION OF DATA AND ANALYSIS

This research study aimed to gain a deeper understanding of the lived experience of inclusion for professional staff in higher education. The psychological experience of inclusion needs to be better documented, especially within a higher education context. The study was designed to capture these experiences from the perspective of an often-overlooked group within higher education, professional staff. Critical incident technique (CIT) was selected to allow the participants to define and share the experiences, interactions, or moments they identify as creating a sense of inclusion. A constructivist approach was used to make sense of the 78 incidents collected during interviews with 23 participants.

This chapter will provide an overview of the participant profile, including the demographic composition and the contextual information about their roles in their respective institutions. A review of the incidents collected will then be presented, including a discussion of the incident type and information about the level at which the incident occurred: the individuals involved in the interaction, and when the incident occurred. An analysis of the incidents, including antecedents and outcomes of the various categories of incidents, follows, and excerpts from the interviews will keep the participant’s voices at the center of this analysis. This chapter will conclude with a review of the analysis and a summary of key findings, which will be more extensively discussed in the next chapter.

Data Collection and Analysis

This study sought to center the moments when participants had an experience or interaction in the workplace that caused them to feel included. The question at the center of this study was: What are the critical moments that create a sense of inclusion for professional staff in higher education institutions? A constructivist CIT approach was used to collect and analyze the
data. Interviews were the main source of data collection and allowed a first-hand account of these moments and why they were important from the participants’ perspective. Often, CIT methodologies include the collection of positive and negative incidents. However, this research study only focused on positive incidents. Participants were allowed to share exclusion incidents, and a few did emerge in the interviewing process.

The 23 participants in this study shared 78 incidents of times they felt included in the workplace. Participants were asked to share up to four experiences, moments, or interactions that caused them to feel included in the workplace. However, most participants were only able to identify three. Interviews were conducted and recorded using Zoom, and the conversations ranged from 35 minutes to 1.5 hours.

**Participant Demographics**

A participant profile form was used to determine eligibility for this research study. Interested participants were asked to complete a brief online form that asked for responses to three eligibility questions in addition to collecting demographic information. The participant profile form included seven questions about the individual’s demographic characteristics and the nature of their work environment. The demographic questions included age, race, and gender. The job function questions included title, division or department, stakeholders the individual primarily interacts with or supports, and whether most of their interactions are internal or external. Table 4.1 provides a summary of the responses for the 23 participants.
Table 4.1

Participant Demographics and Frequency (N = 23)

<table>
<thead>
<tr>
<th>Demographic Category</th>
<th>Data</th>
<th>Frequency, n (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>18 – 29</td>
<td>3 (13%)</td>
</tr>
<tr>
<td></td>
<td>30 – 39</td>
<td>7 (30%)</td>
</tr>
<tr>
<td></td>
<td>40 – 49</td>
<td>9 (39%)</td>
</tr>
<tr>
<td></td>
<td>50 – 59</td>
<td>4 (17%)</td>
</tr>
<tr>
<td></td>
<td>60 – 69</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>Race (self-described)</td>
<td>African American / Black</td>
<td>5 (22%)</td>
</tr>
<tr>
<td></td>
<td>Asian / Asian-American</td>
<td>1 (4%)</td>
</tr>
<tr>
<td></td>
<td>Biracial</td>
<td>1 (4%)</td>
</tr>
<tr>
<td></td>
<td>Caucasian / White</td>
<td>14 (61%)</td>
</tr>
<tr>
<td></td>
<td>Hispanic / Latino</td>
<td>2 (9%)</td>
</tr>
<tr>
<td>Gender Identity (self-described)</td>
<td>Female / Woman</td>
<td>16 (70%)</td>
</tr>
<tr>
<td></td>
<td>Male</td>
<td>7 (30%)</td>
</tr>
<tr>
<td>Division</td>
<td>Academic Affairs</td>
<td>5 (22%)</td>
</tr>
<tr>
<td></td>
<td>Advancement</td>
<td>4 (17%)</td>
</tr>
<tr>
<td></td>
<td>Enrollment Management</td>
<td>2 (9%)</td>
</tr>
<tr>
<td></td>
<td>Human Resources</td>
<td>2 (9%)</td>
</tr>
<tr>
<td></td>
<td>Inclusive Excellence (DEI)</td>
<td>3 (13%)</td>
</tr>
<tr>
<td></td>
<td>Information Technology</td>
<td>4 (17%)</td>
</tr>
<tr>
<td></td>
<td>Marketing</td>
<td>1 (4%)</td>
</tr>
<tr>
<td></td>
<td>Student Affairs</td>
<td>2 (9%)</td>
</tr>
<tr>
<td>Interact Primarily With</td>
<td>External</td>
<td>5 (22%)</td>
</tr>
<tr>
<td></td>
<td>Internal</td>
<td>18 (78%)</td>
</tr>
<tr>
<td>Work Primarily Supports</td>
<td>Faculty</td>
<td>3 (13%)</td>
</tr>
<tr>
<td></td>
<td>Other</td>
<td>4 (17%)</td>
</tr>
<tr>
<td></td>
<td>Staff</td>
<td>1 (4%)</td>
</tr>
<tr>
<td></td>
<td>Staff and Faculty</td>
<td>5 (22%)</td>
</tr>
<tr>
<td></td>
<td>Students</td>
<td>8 (35%)</td>
</tr>
<tr>
<td></td>
<td>Students and Faculty</td>
<td>1 (4%)</td>
</tr>
<tr>
<td></td>
<td>Students, Staff, Other</td>
<td>1 (4%)</td>
</tr>
</tbody>
</table>

Participants were asked to describe their gender identity and race or ethnicity. The majority of participants identified as female (70%) and White (61%). Age ranges were provided, and approximately two-thirds of participants were in the 30–39 or 40–49 age ranges. According
to the 2020 CUPA-HR reports (Bichsel et al., 2020), this sample is similar to the higher education professional staff population, which is 60% women and 23% racial/ethnic minorities. Most participants primarily interact with internal stakeholders (78%), with those participants evenly divided between interactions with supporting staff and faculty (39%) and students (35%). The remaining participants primarily interact with external stakeholders such as alumni and donors. There was a broad range of divisions represented among participants, with academic affairs (22%), Advancement (17%), and IT (17%) making up more than half of the sample.

A total of 16 colleges and universities were represented in the sample, with 11 participants (48%) being the only person from their institution. Ten states were represented among the colleges and universities. Almost half of the schools were located in Massachusetts (48%), which reflects the fact that the professional associations and groups used to recruit are predominantly based in that state. There was a limit of two participants from any one college or university to limit overrepresentation of institutions in the sample. These participants represent just over a third of the sample (35%).

There was one exception made to this limit during the data collection. Interviews were conducted with four members of one department at one college during the first phase of interviewing. This was part of the emergent design and allowed an exploration of whether individuals from the same department would share similar inclusion incidents. There was no overlap between the 11 incidents captured during these interviews. These 11 incidents make up a small proportion of the total incidents (14%), so all the incidents were included in the final sample.
Incident Attributes

Four incident descriptors were used to categorize the incidents collected during the study. These descriptors emerged throughout the interviewing process as aspects of the incidents that seemed important. One category, the level at which the interview occurred, was important because it was one of the sub-questions of the study. The second category, when the incident occurred, emerged early on as important because a range of experiences were noted from as recently as one week ago up to fifteen years ago, so this information was also noted. The third field, the individuals involved in the incident, emerged early in the interviewing as well because of the lack of incidents involving students emerging. The primary stakeholder in the interaction was noted to capture this information. The final category, the incident type, emerged at the end of the interviewing process to determine if saturation had been met and was further refined during analysis. Table 4.2 provides a summary of the incident descriptor categories.

Table 4.2

*Incident Attributes (N = 78)*

<table>
<thead>
<tr>
<th>Incident Descriptor</th>
<th>Data</th>
<th>Frequency n (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organizational Level</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Interpersonal</td>
<td>39 (50%)</td>
</tr>
<tr>
<td></td>
<td>Department/Group/Team</td>
<td>23 (30%)</td>
</tr>
<tr>
<td></td>
<td>Organizational</td>
<td>16 (20%)</td>
</tr>
<tr>
<td><strong>When Incident Occurred</strong></td>
<td>&lt; 1 year</td>
<td>30 (38%)</td>
</tr>
<tr>
<td></td>
<td>1–5 years</td>
<td>35 (45%)</td>
</tr>
<tr>
<td></td>
<td>5–10 years</td>
<td>4 (5%)</td>
</tr>
<tr>
<td></td>
<td>11–15 years</td>
<td>4 (5%)</td>
</tr>
<tr>
<td></td>
<td>15+ years</td>
<td>2 (3%)</td>
</tr>
<tr>
<td></td>
<td>Unclear</td>
<td>3 (4%)</td>
</tr>
<tr>
<td><strong>Involved Parties</strong></td>
<td>Co-Worker</td>
<td>19 (24%)</td>
</tr>
<tr>
<td></td>
<td>Administrator</td>
<td>14 (18%)</td>
</tr>
<tr>
<td></td>
<td>Department</td>
<td>12 (15%)</td>
</tr>
<tr>
<td></td>
<td>Faculty Member</td>
<td>10 (13%)</td>
</tr>
<tr>
<td></td>
<td>Supervisor/Boss</td>
<td>9 (12%)</td>
</tr>
<tr>
<td></td>
<td>Participant</td>
<td>7 (9%)</td>
</tr>
<tr>
<td>Incident Descriptor</td>
<td>Data</td>
<td>Frequency n (%)</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td></td>
<td>Student</td>
<td>4 (5%)</td>
</tr>
<tr>
<td></td>
<td>External Party</td>
<td>3 (4%)</td>
</tr>
<tr>
<td>Incident Category</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Connection</td>
<td>23 (29%)</td>
<td></td>
</tr>
<tr>
<td>Expertise Acknowledged</td>
<td>17 (22%)</td>
<td></td>
</tr>
<tr>
<td>Professional Growth</td>
<td>13 (17%)</td>
<td></td>
</tr>
<tr>
<td>Supported</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leading/Participating in a Strategic Initiative</td>
<td>10 (13%)</td>
<td></td>
</tr>
<tr>
<td>Identity Acknowledged</td>
<td>8 (10%)</td>
<td></td>
</tr>
<tr>
<td>Values Enacted</td>
<td>7 (9%)</td>
<td></td>
</tr>
</tbody>
</table>

**Level Within the Organization of Incident Occurrence**

Inclusion is experienced at a variety of levels within an organization, including the individual/interpersonal level (micro), group or team level (meso), and the organizational level (macro). Organizational inclusion is often described at the leader or organizational level as a variety of practices or policies. More needs to be understood, however, about the individual experience of inclusion. The participant’s description of the incident was used to determine at what level the incident was occurring. Half of incidents shared occurred at the interpersonal or micro level (50%). These incidents were one-on-one interactions with someone in the organization and ranged from invitations to socialize, to requests for advice or guidance, to words of affirmation and support. About one third of incidents occurred at the group or department level, that is, the meso level (30%). These incidents involved members of a participant’s work group and included offers of support after the death of a loved one and recognition awards for stellar performance. The remainder of the incidents occurred at the organizational or macro level (20%). These incidents involved interactions with the organization more broadly and involved policies or practices implemented by the organization, including things like the art displayed on the walls or the addition of closed captioning to Zoom meetings.
When Incident Occurred

The temporal nature of inclusion adds to the complexity of understanding how it is created by the incidents shared in this study. Participants were asked when the incident they shared occurred. Most incidents occurred within the last five years (83%), with a large proportion of those incidents within the last year (38%). The number of incidents that occurred more than 10 years ago (8%) was surprising. Some of these incidents were described as very specific moments that strongly impacted the participant and continue to inform how the participant feels about their workplace. In one case, the participant referred to this incident as something that kept them at the institution despite not feeling satisfied with their work. Some of these incidents were described by participants as “happenings” rather than specific moments. These experiences evolved over time as the participant worked on a strategic project or initiative. One of the participants described clusters of incidents to illustrate the experiences that made them feel included, so it was unclear when the incidents occurred, and they were not labeled.

Stakeholders Involved in the Incident

Organizational leaders are often described as being responsible for the creation of inclusion within an organization. However, the incidents that created a feeling of inclusion for participants in this study were equally as likely to involve an interaction with a peer. Many incidents involved the participant’s co-workers (24%) or department (15%). Administrators (18%) or faculty (13%) were more likely to be mentioned in the incident than the participant’s direct supervisor (12%). Surprisingly few incidents involved students (5%), especially given that 43% of participants indicated they work directly with students. A very small number of incidents involved an external party and generally involved participation in a professional association. The
participant was the main contributor in seven (9%) of the incidents, having taken some action that caused them to feel included. This suggests that individuals also have the ability to create or reflect on experiences in a way that cause them to feel included in the workplace.

**Interview Analysis**

Multiple steps were taken to analyze the data collected during this study. Analysis began during the data collection and then continued in several waves of analysis after data collection ended. Figure 4.1 illustrates the process, and a description follows. Once interviews were completed, the interview recordings were transcribed using Otter.ai. Transcripts were reviewed for accuracy, redacted any identifiable information, and sent the edited transcript to the participant for their review and approval. The approved transcript was reviewed, and individual incidents were identified and separated into individual files. Individual incident files were then uploaded to Dedoose and descriptors identified and added. Two main categories of descriptors were created: demographic descriptors and incident descriptors.
Figure 4.1

Interview Analysis Process

1. Interview conducted, transcript reviewed and redacted, participant provides approval for use
2. Incidents identified, separated into individual files, and uploaded to Dedoose
3. Incident attributes determined, and incident and demographic descriptors attached to media file
4. Thematic coding of the incident including identification of the antecedents and outcomes in each incident
   - Antecedent and outcome codes reviewed by incident type to identify themes
5. Share incidents with coding partners, review input, and incorporate additional insights or changes
6. Memo about insights emerging from the interview review including observations about context, identifying quotes, and noting themes
7. Incident descriptions reviewed and common themes used to identify six incident types
8. Based on review of themes, incident types organized into three main clusters
9. Cross-comparison of incident cluster and incident and demographic descriptors for contextual analysis
The demographic descriptors were provided on the participant profile form and included the demographic and job characteristics of the participant. The incident characteristics included the level at which the incident occurred, when the incident occurred, and who was involved in the incident. A fourth field was added to the incident descriptors when the incident categories were established at the end of data collection.

Thematic coding was done for all the incident files. This included line by line reviews of the transcript to add relevant codes to comments offered by the participant. Coding was done to identify the specific incident as well as any references to things that preceded the incident (antecedents) or things that resulted from the incident (outcomes). During this phase of the analysis regular discussions occurred with coding partners and their feedback was incorporated into the coding. Memos that included memorable quotes or thoughts about contextual factors were also added to the files.

When data collection ended a thorough review of the data was conducted by concentrating first on the incident descriptions. This allowed the identification and labeling of each incident with one of six incident types that emerged. The incidents were grouped by type and the antecedent and outcome codes were systematically reviewed by incident type. This approach helped to identify themes across incident type rather than general antecedent and outcome themes. This level of review also allowed the discovery of clusters of three main categories, each with two of the incident types associated with it. A description of these categories will follow.

A final level of analysis was conducted by comparing the three main incident categories and the incident descriptors. This cross-comparison was critical in identifying contextual themes that were not as evident in the general analysis of the codes.
Thematic Analysis of Incidents

Six incident types were identified among the incidents shared by participants. Incidents were evenly distributed among the incident types. Some incidents had elements of more than one type, so the incident type that most closely fit the participant’s description of the interaction or experience was used. In the course of analyzing the data, the incident types were condensed further into three clusters. Most incidents (78%) fell into one of two clusters, generally describing experiences where someone else acknowledged or affirmed the participants personal (39%) or professional (39%) identity. The remaining cluster of incidents (22%) described times when participants used their professional skills to enact their personal values in the workplace. An interesting distinction was between incidents where someone else was responsible for making the participant feel included versus those where the participant was involved in initiating the experience where they felt included. Figure 4.2 shows the incident clusters and types.

Figure 4.2

Incident Types and Clusters

<table>
<thead>
<tr>
<th>Inclusion Incident Clusters</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal Identity Acknowledged</strong></td>
</tr>
<tr>
<td>• Personal Connection</td>
</tr>
<tr>
<td>• Social Identity Acknowledged</td>
</tr>
<tr>
<td><strong>Professional Identity Acknowledged</strong></td>
</tr>
<tr>
<td>• Expertise Acknowledged</td>
</tr>
<tr>
<td>• Professional Growth Supported</td>
</tr>
</tbody>
</table>

**Organizational or Individual Impact**

• Values Enacted in the Workplace
• Leading Strategic Initiative
The next section of this chapter reviews each of the six incident types organized by incident cluster. A description of the incident type is provided, followed by discussion of the factors leading to the incident, antecedents, and the emotions or feelings resulting from the incident. Contextual factors are discussed, and comments are provided from the participant interviews that illustrate the themes within the incident type.

**Personal Identity Acknowledged Incident Cluster**

The *Personal Identity Acknowledged* incident cluster involved experiences or interactions when the participant felt that they were recognized for who they are as a person more than what they do professionally. This cluster predominantly included times when the participant was invited to or included in situations where they made personal connections with people in the organization (29%). These experiences included invitations to socialize, care expressed during a difficult personal experience, or simply being recognized by someone in the organization. This cluster of incidents also included experiences where an individual’s social identity was affirmed in some way (10%), either through an invitation to enter an affinity space or through a policy or practice adopted by the organization. Figure 4.3 summarizes the incident type, antecedents, and outcomes for this incident cluster. A description of each incident type in terms of these attributes follows.
Figure 4.3

*Personal Identity Acknowledged Incident Cluster Summary Including Antecedents and Outcomes*
**Personal Connections Developed.** Interactions and experiences that developed personal connections were the most common incident type shared (29%). More than two-thirds \((n = 16, 70\%)\) of participants shared an incident that focused on their personal lives and identity more than their professional roles or responsibilities. Often these experiences were social interactions, including group gatherings or celebrations. A few also concerned support that was received during a difficult personal situation the participant was experiencing like the death of a relative or an ill family member. Interpersonal interactions with peers, co-workers, or the participant’s division were the most common for this incident type. These types of incidents were also the most likely to have occurred within the last year. Some of the shortest and least complex experiences involved someone with more power within the organization reaching out to the participant or knowing who they are. For example, Participant 22 described an interaction with the president of his university early in his position. He shared:

> I remember it was a phone call. I think it was on week two, and it was like hey, we just wanted to say congratulations, thanks for coming to [the university’s name]. It was like, did the President really just call me? . . . I would say probably for me, it was more of like somebody is paying attention or recognizing and knowing who I am and what I do . . . like he is invested in my work.

**Antecedents.** The antecedents to these types of incidents included similar themes. The challenges in the higher education environment brought on primarily by the pandemic and the financial pressures that followed played a major role in the feelings participants described as preceding these incidents. Working remotely or in a hybrid environment was noted by several participants as leading to a level of disconnectedness that these incidents helped to alleviate. Others noted that the remote environment created opportunities that did not exist before to make connections that go beyond the professional. People described being let into the lives of their colleagues in a way that removed some of the boundaries that they and others had created
between their personal and professional worlds. Participant 2 reflected on this change and offered:

I think I started my career very, very compartmentalized like this is my this is, who I am at work, this is, who I am at home and then you know, there was a thicker line you know. And prior you know, this is not necessarily because of the pandemic but prior to the pandemic like I’ve seen myself sort of grow into having a much more concentric circles, you know as it relates to that and then I’d say the pandemic has made that even greater.

A few participants described being new in their role or at the institution as making the incident notable. In these incidents the invitation to participate in social gatherings was an important aspect of the incident, as some people did not even attend the actual event but noted the invitation as being the thing that created the sense of inclusion. Participant 23 offered this reflection:

The invitation being the most, like important part. Just being invited to like a right after work happy hour with folks in another department was something where I was like, “Oh, this is great.” And I ended up not being able to go because I was sick. But even just the invitation was really nice.

Sharing a common identity or experience was mentioned several times in these incidents. Being in community with others who share a minoritized identity, like attending a BIPOC affinity meeting or talking to a colleague about a significant challenge, like their similar struggles with the IVF process, were common antecedents to these incidents. A few people also discussed being unsure of how their social identities might be received by their new co-workers or felt unclear whether their work style or personalities would be accepted. Participant 21, who was in a new institution and a new field, switching from a student facing to an employee support role, shared:

But in this new environment, I felt much more reserved. I think, one, based on how I left the place, but two, based on not knowing this HR world the same way. So, I was trying to figure out how to navigate that. And she just so easily put out her hand in a very gentle way. And I think I accepted that. And it’s created this nice connection point.
Participant 9, who works at a performing arts college, described the challenge of being respected by the faculty and students, which he described this way:

I’m an actor, and dancer. And I do work at an art school. But I definitely had some impostor syndrome like coming in. Because there’s kind of this sense of the school where it’s like, oh, you’re only as like cool as your like art story. In a sense, it’s a lot of like street cred… As a dancer, I thought I would find a lot of common ground with the dance students and faculty, but my style is very different from what they do there. And it was not met with the enthusiasm that I thought it would.

The department culture was also identified as contributing to these incidents. Participants who shared these incidents often talked about the supportive nature of their teams, supervisors, or colleagues within the organization. These environments help to facilitate the personal connections developed in these incidents. Participant 23, who is new to her organization shared this about the culture she is experiencing:

Some of it was personality stuff in terms of the way that like, people spoke to each other and interacted and the, like, comfort and casualness, like the dynamics at least in the office, at that time, because there’s been staff changes was very, like, It’s very casual, very friendly. You don’t hold too much to like professional, like conversation topics and that sort of thing …But I think that like, getting to understand the people that I’m going to start spending a significant amount of time with was I appreciated that.

And Participant 22 who is also new to his organization shared:

We’re always in each other’s offices, either, hey, you know, like, reaching out to this alum. I’ve got this alum engaged, like, just wanted to let you know, or I’m, I’m kind of like, “Hey, I’m trying to do you know, these people because I’m trying to engage them, but I can’t get them involved, you know, should I have a conversation?” And so those types of things have made things a lot easier. And it may help me feel more included, like alright, like boulders, I’m not having to push uphill it is a true partnership of like, how can we support and complement each other in the work that we’re doing?

Outcomes. There were a range of outcomes that resulted from these personal interactions in the workplace. Participants began to see themselves, their colleagues, and their organization differently as a result of these interactions. In reflection many participants noted that these interactions reassured them that others saw them more than their role, more than their social identity, more than their work. Participant 11, who took on an administrative assistant role as a
way of returning to the workforce after stepping away to care for a family member, often felt left out of conversation. She shared a poignant incident during which a faculty member engaging her in a conversation about her course material and the impact it had on her:

I remember being like, happy is an overused word, but just that I could talk, like, I think part of it was like, have a stimulating conversation at work. Because the people in the same roles as me were not, whatever, that was their dream job, where it was a steppingstone for me.

And Participant 22, described the feeling of being appreciated for more than his professional contributions this way:

I would say for me, it’s the value of like, okay, so it’s not always just getting questions about the work that I’m doing. Because at that point, you just feel like, well, I’m just a cog in the machine. So you just care about, you know, me helping the rest of this thing continue to move even though I could leave and the thing would still move I university, right, like, versus, you know, I think taking the time to get to understand someone personally, it’s like, alright, so like you actually are a human being. You have other things that go on.

The experience of being seen as a multidimensional being was significant for participants. They commented on feeling seen, appreciated, understood, valued, and connected. Participant 13 shared how the simple act of someone reaching out to ask if she would be joining a meeting changed her perception of how others felt about her. She shared:

I just was kind of like, Oh, okay. You want me to be at the meeting? Like it just feeling noticed, I guess, is the feeling. Whereas I really don’t know that I’ve ever felt that my presence makes a difference at that meeting. So, to take the time out to see would I be joining . . . I felt like oh okay, maybe I mattered to this team in a way that I you know, didn’t realize.

Participant 9 shared how perceptions of him changed after he was able to showcase his talents during a talent show on campus. He shared:

Whereas, like, before, I mean, they just kind of see me as this guy that runs events and maybe helps them with, you know, helping them find a job or something or whatever. But now, they’re like, Oh my God! Did you see the video from Dancing with the Stars, like, you have to see like [name of the participant]’s part, blah, blah, blah? So, I think they, it like, almost humanizes me a little bit for people to I’m not just like, this employee
that like, goes there does what I have to do and like, goes home, I’m like, I have like my own extracurricular activities. I have my own, like, hobbies and interests.

Several participants also commented on how surprised they were by the level of caring and support they received from co-workers or the university. Participant 4, who recently experienced the death of a parent spoke about the way their department responded this way:

That’s exactly what it is. Yeah, it was definitely a sense of understanding. And on a personal level on a human level, rather than Well, you know, this report says that if I say this, or if I give you unlimited days off, then you’re going to produce more. There was never the sense of that it was more like I see you as a person. So, in terms of my mom passing, I would say—it was one of the defining moments where I realized, like, I worked with real people who cared about me as a person.

And, Participant 10, who bonded with a member of the faculty who was also experiencing similar health related challenges shared:

Yeah. It felt great. And it felt like he had intentionally reached out and just given me a hug. And, like, given all of me a hug, not just this [name of college] part of me, but given all of me a hug, because I’ve shared with him. What I’ve now shared with you is that, you know, it’s been a long, hard road. And, and he got that.

Participants also commented on the ways their interaction with their colleagues shifted because of these incidents. Participants felt more comfortable sharing about their personal lives with people in the workplace. They also mentioned feeling more engaged in their work and more likely to remain at the University. Participant 14 felt comfortable talking about her struggles caring for a relative with mental health challenges with her direct report and that shifted the nature of their relationship and how she felt about the workplace. She commented:

There was almost like a little bit of a relief. I think, like, “Oh, I could just tell him this.” And if I need to vent about it, like, he’ll know why I’m venting. Or if I need to say something like, “Oh, my dad’s not doing well, today.” It’s not, or like, I’m upset, because he’s not doing well, like [name of person] will have this sort of background history. And so, it was kind of like a relief.

A cross-cultural friendship that developed for Participant 19, allowed her to be more comfortable sharing about her personal life in the workplace. She shared:
You know, I let her know, from where I was from, and you know, how I grew up. And there wasn’t any, and she was open to learning. And I was too... that interaction, you know, breaks down my wall and made me feel less vulnerable and more open, so I could, you know, talk about nearly anything with her.

Socializing with the members of their new department helped Participant 21 to feel more engaged and to reconsider the length of time she might invest in the organization. They shared:

I always thought like maybe [names her university] could be like a really nice like a steppingstone, right? I’d be here for a year or two and then look for another opportunity. Which still might happen, but I think these moments make me think like no, this is a good place to be like let’s not rush this like let’s give it some more time for this team to form again. So really new look how thoughtful these people are. You obviously have good connections with them.

Participants also mentioned that one of the benefits of developing these personal relationships is the increased access to opportunities and resources that result from these connections. Participants expanded their knowledge about the organization and their fields.

Participant 20 shared about being included in meetings and being asked to sit on committees because of her new relationship with a colleague outside of her division. They shared:

I think also that impacts feeling included, like on campus, because now she and I have that sort of understanding and relationship. And now she can also include me, in other spaces, or vice versa. And so like she’s invited me to sit search committees for housing staff, and I’m trying to think of other things, but like, it’s translated sort of into, like, some inclusion at the workplace also, because now, she not only is it like a face, but it’s also like, I know her like, we work well together, or like, I know, she has good insight or whatever. So, I get invited to the table.

And Participant 21 commented on the access to resources and people in this new field they have recently joined who help them to be more effective in their work. They shared:

I think also that impacts feeling included, like on campus, because now she and I have that sort of understanding and relationship. And now she can also include me, in other spaces, or vice versa. And so like, she’s invited me to sit on committee, like search committees for housing staff, and I’m trying to think of other things, but like, it’s translated sort of into, like, some inclusion at the workplace also, because now, she not only is it like a face, and oh, you’re the center. But it’s also like, I know, I know that I know her like, we work well together, or like, I know, she has good insight or whatever. So, I get invited to the encounter.
Finally, participants noted that these personal interactions were a source of fun in the workplace. People enjoy interacting with and getting to know others in more informal ways. Participant 23 who regularly works at a communal table with people from her department shared:

I mean, it’s fun, for lack of a better word. People joke with each other. They kind of tease each other sometimes. You’re getting things done, of course, but then you’re also just hanging out also at the same time where there’s that going on. And then because so much is housed in student engagement, like people are coming and going, it’s fast paced, it could be loud at times. So, if like there’s certain things you need to get done, not the right space for that. But in terms of the again, there’s like that casual comfort the I think just like finding the fun where you can and that sort of thing. I think that that was a real place to find that and feel a part of the flow of the office.

**Social Identity Acknowledged.** These incidents involved times when participants received cues either explicitly or implicitly that their social identity was welcomed and valued in the workplace. These incidents were not as frequently cited, with only five of the 23 (22%) participants sharing, however, all five contributors to this category are women of color. The incidents shared focused predominantly on racial identity, but also included incidents focused on ability and sexual orientation.

The explicit incidents offered were generally invitations to participate in affinity group spaces provided by the institution to create safe spaces for minoritized groups. The implicit incidents were related to experiences where participants did not have to ask for their identity to be acknowledged or valued. These implicit experiences were often at the organizational level, where the participant experienced something within the environment that signaled their identity was seen and valued. For example, Participant 19, who has a hearing impairment, felt included when the organization began closed captioning Zoom meetings. She shared,

I’m able to, you know, know what is going on rather than if I miss that word or that sentence, then sometimes I feel that embarrassment or you know, reaching out to someone or I don’t get the full context because of that. So that to me was very encouraging and made me feel a part of [names her the organization].
Antecedents. The antecedents that participants shared connected to these incidents were primarily about the ways they are perceived by or perceive the organization. A few participants discussed the experience of being the only or a minority in the organization. Several participants discussed the challenge of working at a predominantly White institution (PWI) and the need for validation. Participant 18, who identifies as African American, described what it felt like to work in an office with mostly people of color at a PWI this way:

And here, in an environment where you are having to be a chameleon, because you’re trying to validate why you belong there, that you belong there, that you have knowledge and expertise that needs to be taken into consideration, versus having to validate why you get to be in the room, and you get to have a voice when you’re in. Right. So, I felt myself being a different person there that I felt good about, and comfortable, more comfortable with than I had been in my professional career prior. And I think it created a space for me where it’s like, I cannot go back to being inauthentic.

Similarly, Participant 13, who also identifies as African American, discussed the difference in expectations she felt when switching from being a student at her PWI to a staff member this way:

I feel as a student [name of their university] really empowered me to be my full self. And then as a staff member, I feel sometimes just because this is an institution, you kind of learn that they want you to maybe trim some of those edges . . . It’s that constant battle about balance or battle with that, how authentically can I show up? And I don’t know if there’s anything the institutional environment can do. That’s just something that I always am going to go through as a Black woman showing up into any kind of space is something that I feel I’m tasked with navigating how much of my authentic self can I bring to this space?

Not all participants felt they needed these spaces, but they were grateful for the invitation. Participant 17, who identifies as Hispanic, described being invited to participate in an affinity group for Hispanic staff early in her experience at the university. The person who invited Participant 17 also made some comments about her identity which she found offensive, but Participant 17 still felt included because this part of her identity was acknowledged. She shared:
I felt included from the perspective of well, here was an event and a community on campus that I could associate with, that I could identify with, and had the approach been different, I might have actually taken that next step and participated.

**Outcomes.** The outcomes described by participants as being associated with these types of incidents included feelings of affirmation and empowerment. Participants described feeling seen and connected to others and the organization in new ways. Participant 18 described feeling more effective in her role because of shedding the usual burdens she carries as a result of her racial and gender identity. She shared:

I think it was a feeling of confidence in my knowledge and expertise, I did not have to prove myself, in the same way that Black women have to prove themselves in predominantly White environments . . . so because I don’t spend my time, preening or proving myself my work was not stressful. In the same way, it wasn’t like my work wasn’t heavy, because I’m carrying the stories and the burdens of students who are struggling, right. But it was not stressful, in the same way that you carry that heaviness, here.

They also spoke to the importance of representation. Participant 18 remarked as follows when reflecting on the racial demographics of the leadership team at her university:

It was just, it was really a breath of fresh air to be in that space to have, you know, your vice president of student affairs be a Black guy, you know, to have directors be Black women to have the President be a Black woman. Like, I mean, it was just, it was just so different than what I had ever experienced...It is a unique experience, to see yourself reflected back, when I think about it from a student perspective, right? To see yourself reflected back in the people that are serving you, right. But it is a whole other worldly experience, to be a staff member or administrator when you are surrounded by reflections of yourself also working towards a common goal of getting students to where you have been.

These feelings helped them to see the University in a new way and to feel that they mattered to the organization. They also commented on the importance of actions that demonstrate the values espoused by their organizations. Participant 19 offered that when the University actually gave people time off in addition to a programming around Juneteenth and Indigenous Peoples Day, she felt it demonstrated their commitment. She stated:
Just the recognition of that, we have the holiday, this is what we’re doing. We’re also extending a half a day to you; it means so much more. You really can see like the celebration. Indigenous Peoples Day I do believe we do have that. We have that off as well, which had been like an option in the past…To me, it really shows you know, you’re a stand-up institution.

**Professional Identity Acknowledged**

The *Professional Identity Acknowledged* incident cluster involved experiences or interactions where the participant felt their work and content knowledge in their fields was recognized and valued by others. This cluster included experiences when the participant’s expertise was acknowledged (22%) including times when participants were asked to present, received awards, or were asked for advice by colleagues. Almost as common in this cluster were incidents where the participant was supported to grow professionally (17%) through stretch assignments and encouragement to take on new roles. Figure 4.4 provides a summary of the incident type, antecedents, and outcomes for this incident cluster, and a description of each incident type in those terms follows.
Figure 4.4

Professional Identity Acknowledged Incident Cluster Summary Including Antecedents and Outcomes
**Expertise Acknowledged.** These incidents were some of the most commonly reported among participants. Thirteen of the 23 participants (57%) spoke of incidents that involved having their professional expertise acknowledged. Participants recalled moments when their work or knowledge in a particular area was recognized by a senior leader, faculty member, or the university more broadly. Acknowledgments by senior leaders and departments were often public and involved awards and accolades during meetings and celebrations. Invitations by senior leaders to present on behalf of the department or division were also noted. Incidents involving faculty were often one-on-one interactions and described by participants as particularly meaningful. Senior leaders and faculty members were often identified as acknowledging the participant; however, a few incidents about peers asking for advice were noted as causing a feeling of inclusion as well.

**Antecedents.** Participants mentioned a variety of antecedents to this type of incident. Being new in your role was commonly associated with this type of incident. Participants also described lacking confidence in their abilities or feeling pressure to be good at their work.

Participant 6, who was new to her role as a director shared:

> So, it was really just me, which is kind of scary. I mean, obviously, all of the administrators in the schools and academic units contribute to the leadership of their own programs, and you know, their own academics and things like that. But there’s really not a lot of other professionals on our campus that do the work or have the expertise that I do.

Prior experiences where participant’s opinions were ignored or devalued and being perceived as different were also highlighted as antecedents to these experiences. Participant 15, who is taking on her first director role in a new organization, shared her frustrations this way:

> That’s a common feeling I particularly have, especially being a woman of color, even though I’m a director. Often you get talked over, people kind of think they’re smarter than you. They kind of have their own self-interest… Me saying there’s not enough doesn’t appear to be enough to kind of really convince. I need to produce very solid, very specific data, often to kind of be heard when I can see the problems that are processed quite from a distance. But to kind of convince and turn other folks over to that, to get that
understanding, I feel like I need to be able to produce very hard, strong, consistent metrics and I need to be able to do it at the drop of a hat.

The culture in the environment or the department/division also created the conditions for these incidents. Participants described positive work environments where their supervisors made space to celebrate the success of individual team members, or where they offered feedback regularly.

**Outcomes.** Outcomes associated with these types of incidents included a variety of emotional and tangible responses. Participants noted feeling appreciated and respected because of these interactions. Participant 2, whose group was given a university-wide award, shared:

[We are] unsung heroes, you know, and that’s tough and that you have to have a lot of really strong self-motivation and confidence in what you do to continue. And you know, I think that’s much harder. You know when you get sort of the ‘nice job’ out of the bag, you know and it doesn’t have to come with a bonus, it doesn’t have to come with necessarily you know, a financial or gift of any kind, but you know that helps a tremendous amount.

Participants shared feeling a sense of pride in being recognized and a feeling of gratefulness to the organization or their colleagues for the recognition. Participant 16, who was invited to facilitate a campus-wide presentation by the faculty, offered:

I was honored. I think that’s the word. I was honored. Because essentially, I knew they had so many options, so many people they could ask, and they asked me and gave me really a lot of latitude with the webinar. So, it really was, I was proud. I was happy that I could represent, and I could speak about some subjects that I thought were interesting.

Participants also reported feeling more engaged in their work and feeling more productive because of these interactions. Participant 14, who received a divisional award, commented:

But it like makes you want to dive in even more, and just do your best and just like, give, give it your all, you know, when you’re recognized for your work. Sometimes it’s just nice to be valued for the work that you’ve done.

And Participant 8, who had been asked for advice by a co-worker, shared:
I start cheesing, the smile comes out because it makes you happy. It makes you happy when people value what you have to say, when people value your opinions, I think it’s something that I wish it would happen for every employee so that we could continue to retain every staff member.

In addition, participants gained confidence in their abilities and ability to do the job. For example, Participant 11, who was asked to assist a faculty member in her class, commented, “it kind of made me realize I could be doing a lot more than I was doing.” Or, Participant 15, who recently started a director role, shared “I think it reaffirmed my place, and I felt more like a, you know, it seems like I felt like an actual true leader of the area.”

**Professional Growth Supported.** Interactions or experiences where the participant felt their professional growth was encouraged or facilitated were also common. Eleven of the 23 participants (48%) also shared incidents in this category. These incidents revolved around experiences with people more senior in the profession or organization who gave the participant opportunities to grow and learn. These experiences were primarily with direct supervisors but sometimes with prior supervisors who remained supportive or with leaders in other areas of the organization. They included times when someone encouraged them to apply for a new role or when they were offered a stretch assignment. Inclusive leadership practices were cited in this category, with supervisors being transparent and offering information about the organization to keep the participant informed. A feeling of inclusion was also created when supervisors asked for and utilized the participant’s input.

**Antecedents.** The antecedents associated with this type of incident have to do with the work environment and the participant’s perception of themselves and their work. The challenging environment in higher education resulting from the effects of the pandemic, like budget cuts and high turnover, was mentioned by several participants. These conditions caused supervisors to be more creative in the ways they provided opportunities for growth and created
opportunities that might not have otherwise been available. For example, Participant 21 asked for
and was given a stretch assignment because of the turnover in her department shared:

We’ve had a lot of transition. So, at one point, we had no one in our benefits team, everyone for benefits left. And they didn’t have anybody to take on our like leave of absence process for employees . . . and I had never taken a leave myself nor really interacted with it. So, I said, I’m happy to try this out. Like, can I be the point? And I think inclusion in the sense of it would have been easy for my boss or the VP to say, No, we’re going to ask so and so to do this, but they were like, alright, Participant 21, let’s see what you got. So, I think the opportunity without saying no, to manage this process for three months while we took on hiring new folks, was really impactful.

Stage of career progression was also mentioned. Newer professionals discussed lacking
confidence in their roles, while participants who were more advanced in their careers discussed
wanting more flexibility. Participant 1, who recently started her professional career, stated:

It makes me really nervous. It’s a new thing, I’m not 100% confident in it yet, but they like treat me as an adult. And I’m only 25, and I like, you know, just graduated with my masters, and I’m like here doing the thing. Sometimes I don’t feel that way, but they have a lot of trust in my ability to, like, do this.

Participant 3, who is a more experienced professional, pointed out:

And I applied for and then moved over here. And he too saw the same thing. Like [name of participant] . . . can you do this and, you know, I’m never one to walk away from a challenge. So, I would figure it out. And that’s a lot about who I am, like, put it in front of me, give me some space. Let me learn. Support me.

The leadership style of the supervisor was also mentioned as a critical antecedent to the emergence of these kinds of incidents. The environment created by the supervisor sends signals
to the participants about the degree to which they value their growth. Participant 7 offered the following comments about their supervisor.

My supervisor . . . like encourages and trusts us to take our own initiative. And she supports it when it happens. And she also is really, she is emotionally intelligent, and concerned about making sure that we are like happy and growing in our jobs. So already, like, it’s so crucial to have a good supervisor who has that intelligence and the lack of ego to do that, because they see their role as someone who is like coaching their team, right to get their supervisees to be the best part of themselves. To bring that to work and like how to encourage them to grow into the places where they can, you know, do better get challenged, all those kinds of things. And you know, we have another team within
advancement that does not have such good leadership and supervision. And you see how that plays out. You can see the difference.

**Outcomes.** The outcomes that resulted from these types of incidents varied. Participants described feeling respected, valued, appreciated, and cared for when someone encourages their professional growth. Participant 16 described the feeling this way:

That was huge for me because it was a new relationship. We weren’t friends. We were work acquaintances at that point. And she saw something. I don’t know what she saw. But she said, I don’t know if you’re looking, I don’t know what you know, but I just want to let you know, you should take a look at this position. I happen to see it. It’s . . . it was a great position, but it wasn’t for me. But I thought it was just a huge compliment, a huge recognition of whatever she saw.

Participants indicated they would be more comfortable seeking advice, guidance, and support from others. They also noted feeling heard, trusted, and understood because the investments are individualized to them and what they need to advance. Participant 15 described the investment her supervisor makes in her professionally this way:

There’s something about kind of being like, like singled out, or maybe that this is more individualized to you that he could also just call it a night and go home, you know, and just be like, there’s a lot going . . . It also helps that he’ll say like, I see you having a future here, I see you on like a Vice President track, I’d like to get some of these plans, you know, how do we set you up for success? And what are the skills that you need to move up to the next level that makes me want to stay? Because I’m being very meaningfully and purposely included? Not just like, the thing that goes for every single person across the board.

Participants also mentioned developing strong and enduring relationships with the individuals who provided these growth opportunities. Participant 3 shared the following reflection about a prior supervisor who mentored them.

I don’t think he knew at the time quite what he was getting himself into with me. That’s okay. Yeah, we grew together. And he has left, he is now a president at a different institution. But we stay in touch, like we were able to form a good relationship. And he is, you know, I think all of us, when we look back at our careers, how many times were we blessed to really have that person who was a supervisor and mentor and you know, just a really special person in your life, and it doesn’t happen as often as it probably should.
Participants also indicated feeling more engaged in their work and willing to participate. Participant 13 shared these comments about her interactions with her supervisor:

When she’s asking for my input, and she’s taking it, I’m more willing to give it, so I’m more engaged, I feel more willing to, you know, participate or go there. Think about it. Whereas if I feel like she’s asking just to ask that it can always just be a quick conversation, it’s easy to put a button on it. We can just like I can say a few things, and we can move on. So, I guess it’s just the difference for me is the level of my willingness to engage with whatever I’m being asked.

Values Enacted in the Workplace

The final incident cluster, professional skills used to enact personal values, seemed to represent an overlap between the first two clusters. These incidents involved experiences where the participant took some action within their organization that enhanced the experience for others or that benefitted the organization or their field in some way. Participants shared several incidents about taking on a leadership role in strategic initiative that gave them the opportunity to grow professionally while building deeper relationships (13%). Participants also relayed experiences where they had taken some action based on their values (9%) that either made space for someone else in the organization to speak up or where they were able to challenge the system. Figure 4.5 provides a summary of the incident type, antecedents, and outcomes for this incident cluster, and a description of each incident type follows.
Figure 4.5

Professional Identity Acknowledged Incident Cluster Summary Including Antecedents and Outcomes
Values Enacted in the Workplace. These incidents involved moments where participants linked feelings of inclusion to opportunities to enact their values in the workplace. Six of the 23 participants (26%) described an incident that matched this category. When sharing these experiences, participants discussed how these moments helped them to either challenge or connect to the existing culture through experiences where they saw their values either ignored or reflected. These incidents often involved making space for others in the organization to speak up or be seen. For example, SC, who identifies as White, was involved in providing a space for a Black colleague to share about their experiences during a racial dialogue group at work. Few incidents involving students were offered during this study, but the majority of those offered were in this category. Participants commented how advising students with whom they shared a common social identity made them feel included in the workplace.

Antecedents. The factors contributing to these incidents included antecedents like feeling connected to the mission of the organization and participant’s sense of the importance of their work. Several participants discussed their perceptions of the institution before they started working there as contributing to the incident. For example, Participant 18 received cues about the environment being open to challenging discourse during the interviewing process and then early in her tenure described an inclusion incident that reinforced that perception. She stated:

I remember saying to my supervisor . . . What is this platform? I’ve never seen anything like it. And so, she was like, “Okay, let me explain.” And she’s like, you know, this platform . . . It is a public space so it could be an airing of grievances space, if that’s what people want it to be or it’s a call to arms type of environment of, here’s something that we need to work on . . . This is what like you need to remember that we’re different than these other institutions. So, some institutional memory, holding court keeping leadership to task, right. So again, like, wow, like, just like, this doesn’t happen, right? There’s no public space for this, that I’d ever seen. Right. And that said something to me about this is a unique place.
While SC described having negative associations with the culture at his institution prior to working there, his participation in a dialogue group changed his feelings. Prior experiences at the institution were also influential as two participants, Participant 8 and 20. They described being able to connect their experience as students at their institutions to their roles now advising students as critical. Participant 20 shared her experience helping students revive a campus organization she had previously been involved with this way:

We’ve had a [name of feminist group] on this campus intermittently, like, I was involved in it as a student way back when, and then it would die off for a few years, because there was an interest and then like, pick back up . . . there are two students . . . talking about being interested in a student organization that would work on like, women’s issues, feminist issues. And I mentioned that we had had this group before . . . And then yeah, she just said, like, “would you advise us?” and I said, “Sure. Like, I’d be happy to.” I love the group.

Finally, participants described the supportive nature of their teams as contributing to their comfort in taking the action that led to them feeling included. Participant 7, who spoke out at a divisional meeting, attributed her comfort in doing that to the ways her supervisor had prepared the team by sharing information in advance about the topic and then her team encouraging her to speak up in the moment. She said: “In the Slack channel before I spoke, I was like, ‘I’m going to say something, just letting you know.’ But without prompting, right, my two younger colleagues also spoke up. And that kind of started like a mini floodgate.”

**Outcomes.** Participants used words like honored, proud, ampmed, and happy to describe the outcome of these incidents. One word used by two participants was “wow!” to describe the emotions resulting from their involvement in these experiences. Participants discussed feeling seen and knowing they could be more fully themselves because of these incidents. Participant 10 described a moment in a meeting more than 15 years ago when he first started at his university:

I remember I felt tremendous, tremendously included. And I felt like I was bringing my whole self to the table . . . it was just like breathing fresh air. Like, I, I remember walking out and taking a deep breath and feeling like, wow, this is where I belong . . . this felt
tremendously life giving . . . I wasn’t in a prescribed box. And my thoughts were appreciated. And they were heard. And, and they were reacted to and someone else had a further idea. And someone else had a further. And it just, it was a great collective experience.

Participants also discussed the effects of deeper connections that were formed with colleagues, students, and the organization. Participant 8’s feelings of inclusion were linked to the rewards of mentoring and career coaching of students and in turn influenced his tenure with the university. He shared:

I had a student and she to this day will contact me and say, “You were my advisor then and I’m calling for some advice on job search. I’m calling for some advice on my resume.” Still to this day. “You were my advisor”—and that is a perfect sense of belonging to this campus when students, look to you as a role model in the future and still reach out for advice . . . I think for me, those are the types of things that really connect me and bind me to this campus in terms of when I see our students succeed, we celebrate with them as well.

Participant 20 also noted the importance of this connection to students because these experiences, in her mind, are not usually available to staff. She said:

When students seek me out, yeah. When students come to me and ask me to advise them, that’s also sometimes a role that is afforded to faculty, and not necessarily staff. So, when students come to me and ask me to advise their student org, yeh, I’m like, it’s kind of a, like a strong word. but I’m, I’m pretty honored to, like serve them in that capacity.

There is also a sense of fulfillment and satisfaction that emerges from these incidents.

Participants shared about the ways others were made to feel included because of their actions.

For example, Participant 7 described how speaking up in a divisional meeting provided space for another colleague to be seen:

But what I found very powerful. And sort of like, oh, okay, I’m glad I spoke because . . . an older Black woman who works out of the [name of city] office who has worked for [name of her college] for like, 20 years. She was like, “I don’t usually speak at these things . . . but, like, I really appreciate [name of a participant] for speaking up and sharing that and because, like, as more people share it, I was like, okay, you know, I feel comfortable, like, I can share this because I am so often having worked at this institution for 20 plus years, I’m the only person of color the only Black person, the only Black woman in so many spaces so many times. And, you know, when I see something like
this, this tells me like, this place is not for me.’ And that was like, super powerful, super powerful.

**Leading or Participating in a Strategic Initiative.** These incidents involved experiences when the participant was involved in the development of a group or program that impacted the organization in some way. Ten of the 23 participants (43%) discussed an incident in this category. Participants who shared these incidents tended to have been at the organization for a long time (10 or more years) and their descriptions of the incidents were less about moments in time than about the cumulative impact of the experience of being involved in these initiatives. Others who had not been at the organization for a long time told of experiences when they initiated leadership roles or took up leadership outside the organization through professional associations. Experiences that were described as specific incidents were focused on volunteering for specific events. Leadership roles were central to many of these incidents and participants either advocated for these roles or were encouraged to participate by colleagues. One participant was involved in unionizing the staff. Another took on a leadership role in their staff advisory council. Another organized the university’s LGBTQ affinity network.

**Antecedents.** The specific nature of higher education environments contributed to the emergence of the incidents in this category. Participants mentioned, for example, a commitment to shared governance, the high turnover rate, and the disconnected nature of a city campus and hybrid work environments as driving their desire to create or participate in these initiatives. Participants described looking for a way to have an impact and make connections. For example, Participant 9, whose city campus creates a disjointed office environment, asked to create a new task force to provide opportunities for more engagement. He described:

> It tends to feel like very siloed, as I said, so it’s like you’re in your office, and you might be a block away from the next office. A lot of other people were feeling this way. So, I approached my then Vice President and said, we need to do something about like camaraderie, we need to do something about like bringing people together. I was like,
because I have no connection to half this team. You know, ‘here’s forty of us and I interact with six of them on a regular basis.

Participants also discussed the perceptions of staff and their fields as impacting their desire to become involved in these initiatives. Participant 6 said that she feels her field, graduate admissions, is often seen as less important than undergraduate admissions. And Participant 16 expressed her feelings about staff being devalued in higher education, which encouraged her to become more involved in the staff advisory council. She stated:

I began to more clearly see the distinctions between the role of staff and the role of faculty in relation to who’s important and who’s not so important, just in terms of the dynamics and how students and faculty were often elevated in conversation, and staff were rarely even mentioned.

Participants also described their perception that becoming involved in these initiatives which focused on specific populations would make it easier for them to build deeper connections. Participant 6 explained:

I’m also definitely more attached to my functional area than I necessarily am to a particular institution. So, like, I am a member of [her professional association], and I would say like that place makes me feel very included, because it’s a lot of professionals, learning about the same things and trying to figure out new ways to attack problems. And everyone is kind of lifting each other up in a very genuine way. Now, there’s still things that I don’t agree with necessarily in terms of like, calling it your family and things like that. But in terms of an environment where I feel like I am a part of that, I think because we all share a very common workplace dynamic, it’s very easy to make other people feel included, because you have more common topics versus myself and someone at the university who works in a totally different, like accounts payable.

**Outcomes.** The outcomes associated with these incidents result from the needs of the participants to find connections and have impact. Participants described feeling more comfortable being themselves in the workplace and more connection to their organizations overall as a result of their involvement. People felt prouder to identify as staff member or within their fields and some participants felt more comfortable with their social identities. Participant 4, who started the university’s LGBTQ network, relayed, “I did realize as part of forming these
organizations, and that community becoming more visible on campus, that I was also becoming
more comfortable, in general within myself, and also being myself.”

Participants developed leadership skills, stronger networks, and were given the
opportunity to learn and be mentored by more senior leaders in their fields. Participant 9 said this
about the vice president of his division who sponsored the task force he was leading:

So, I went to her office. And she recommended other people who had come to her with
similar ideas. It was also a good chance to engage some of those employees that, you
know, she shared with me were like, very disgruntled. And again, this felt like a moment
where she was like, “I’m bringing you into this circle of like, trust.”

Participants also had the opportunity to encourage others within their organizations to
become involved, access development, and form networks enhancing the impact of their efforts.

Participant 17, who was a leader of the staff advisory council commented:

We started to have dialogue with HR when I was the chair elect. When I became the
Chair, we also got a new president. And I said, well . . . maybe this is an opportunity for
us to move the conversation directly to . . . the President. And we were able to do that.
And this body ever since then, has had a regular dialogue directly with the President.

And Participant 12, who has a leadership role in her field’s regional chapter, offered:

Being able to, you know, rely on that network, when something comes up, if there’s a
question, if there’s a sticky situation, or even just recommendations, and how would you
handle this or vendors or whatever . . . Now I’m even bringing that the power of that
network back here, which is only going to help serve me and my institution in the work
that we’re doing.

Because of their inclusion experience, participants also said they felt more connected to
their organizations and had a sense of ownership and pride in the organization in a way they had
not before. Participant 4 stated:

It’s been great because when I started there, I certainly didn’t hate the school or the
organization, but I certainly wasn’t a cheerleader, a champion. You know, it was it was
much more of a job . . . and that definitely, absolutely changed to the other end of the
spectrum now.

And Participant 17 said:
I feel like, at least for me, no, it is not perfect, this is not a Nirvana, and I can give you a whole list of problems. But I also feel a sense of ownership for improving the place. And not that I have the power or the influence to have huge impacts across the whole institution. But I feel like I can, even in small ways, make an impact that can have a ripple effect of positive things. Right. And I think a big part of that is because I’ve invested in working with my colleagues across the campus to try and make it better for everybody.

Cross Sectional Themes

To gain a deeper understanding of the contextual elements impacting the creation of and the impact from the incidents described by participants, cross sectional analysis was conducted. The sub-questions that were identified during the design of the study and the incident descriptors captured were used to guide this analysis. In addition to understanding the moments or experiences that led professional staff to feel included, the levels at which these interactions were occurring within the organization was explored and tracked, when during the participant’s tenure at the institution the incident occurred, and who was involved in the experience. These elements were captured in incident descriptors. During the coding process, comments were identified that addressed the ways the participant’s self-concept was impacted. The incident types and clusters were compared with the incident descriptors and codes and a description of the cross-sectional findings is detailed below.

*Incident Type by Level at Which It Occurred*

The aim of this research was to gain a deeper understanding of the psychological experience of inclusion in the workplace. A central question was about what the critical moments were that generate a feeling of inclusion for professional staff in higher education. The 78 incidents collected provided a broad array of experiences that occurred at various levels within the organization. This was expected since inclusion is understood to exist at many levels. This study examined the impact of the levels on the type of experience shared. A sub-question used to guide the analysis was, at what levels in the organization are these incidents occurring? Each
incident was evaluated, and the level at which the incident occurred was assigned to the experience.

Table 4.3

_Incident Type by Level_

<table>
<thead>
<tr>
<th>Incident Type</th>
<th>Interpersonal n (%)</th>
<th>Group/Departmental n (%)</th>
<th>Organizational n (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Connections</td>
<td>12 (31%)</td>
<td>10 (43%)</td>
<td>1 (6%)</td>
</tr>
<tr>
<td>Social Identity Affirmed</td>
<td>2 (5%)</td>
<td>2 (9%)</td>
<td>4 (25%)</td>
</tr>
<tr>
<td>Expertise Acknowledged</td>
<td>10 (26%)</td>
<td>4 (17%)</td>
<td>3 (19%)</td>
</tr>
<tr>
<td>Professional Growth Supported</td>
<td>11 (28%)</td>
<td>2 (9%)</td>
<td></td>
</tr>
<tr>
<td>Leading/Participating in a Strategic Initiative</td>
<td>1 (3%)</td>
<td>3 (13%)</td>
<td>6 (38%)</td>
</tr>
<tr>
<td>Values Enacted</td>
<td>3 (8%)</td>
<td>2 (9%)</td>
<td>2 (12%)</td>
</tr>
</tbody>
</table>

As seen in Table 4.3, there were a range of levels across each of the incident types and incident clusters. Patterns emerged not only for the level at which certain incidents occurred but also according to who was involved in these incidents. Half of all incidents occurred at the interpersonal level and involved one on one interactions. There was an interpersonal interaction noted across every incident type and were equally likely to occur in the personal or professional identity acknowledged clusters. Incidents involving faculty only occurred at this level and were almost exclusively one-on-one conversations with the participant that included acknowledgment of their expertise. Similar differences in incident type emerged in terms of who was involved in the interpersonal interaction. Interactions with supervisors were most common in the incidents where the participant’s professional growth was being supported. Interactions with students
emerged predominantly in the values enacted in the workplace incident type. Interactions with peers were predominantly of the personal connections incident type.

Interactions at the departmental or divisional were also common and included experiences where the entire group was involved or witness to the interaction. The most common incident cluster for these interactions were incident types in the personal identity acknowledged cluster. Invitations to socialize or interact with people in the group or department were shared. The experiences where a participant’s team or department supported them through a personal life experience such as throwing a baby shower or sending gifts of comfort after the death of a loved one, were also common. Less frequently shared were experiences where the participant felt supported professionally by their team or department.

The incidents that occurred at the organizational level were not shared as often in this study. When they were shared, they were most likely to be associated with the Professional Skills to Enact Personal Values cluster. This is notable because these incidents occur less frequently but are the most common to occur at this level. The policies and practices of the organization were noted. For example, these included the organization exhibiting works of art by artists of color, using closed captioning in Zoom meetings, or recognizing specific cultural holidays. The other incidents that occurred at the organizational level involved initiatives that the participant was involved in that had an impact across the organization. The incidents shared at this level are also the ones where the main party involved is the participant. Inclusion at this level often results from some action taken by the participant or as the result of the participant reflecting on their experiences in the organization.
Incident Type by When It Occurred

Inclusion is a complex concept, and that complexity was evident not only in the variety of incidents offered but also in the meaning ascribed to those incidents by participants. The ways in which participants described the impact of these experiences varied from a temporary feeling of happiness to something they would never forget. This range of emotional responses and the duration of these emotions is intriguing and speaks to the challenge of understanding this phenomenon. As described above, most of the incidents offered occurred within the last five years, with more than a third of all incidents happening in the last year. Ten of the 78 incidents, however, occurred five or more years ago and were generally shared by the participants who had been at their institutions the longest. The detail and specificity with which participants recalled these incidents from five, 10, or even 15 years ago were surprising. For example, Participant 3 described the night that the staff voted to unionize and recalled not only what the atmosphere was like in the room but what was happening in her family life at the time and what she had done that day leading up to the vote.

The incidents that occurred over five years ago varied by type but were most likely to be times when the participant was leading a strategic initiative or when their values were enacted. This suggests that these kinds of experiences create more complex emotions than other incidents described, because they affirm both personal and professional aspects of the participants identity. The duration of the feeling of inclusion may also be influenced in some way by the type of incident.

Most of the incidents that occurred over 10 years ago were shared early on in the interview suggesting they remain salient for participants as examples of inclusion experiences within the workplace. It also speaks to the importance of the experiences at the beginning of an
individual’s employment at an institution. These incidents are critical and can act as an anchor for employees as they navigate the experience of inclusion throughout their tenure with the organization. Interpersonal interactions with others and involvement in the organization were the most mentioned, suggesting that these interactions may remain more salient over time than those that involved the participant’s group or team.

**Incident Type by Involved Party: Who is Responsible for Inclusion?**

The incidents shared in this study describe, from the perspective of the participant, an individual experience of inclusion. The incidents shared occurred at all levels within the organization, however, including the individual (micro), group (meso), and organizational (macro) levels. In most of the incidents the experience of inclusion was the result of an individual, group, or the organization including the participant. In the remaining incidents, however, the experience of inclusion was the result of the participant creating opportunities for others in the organization to feel included or efforts to make the organization a more inclusive place. The participant was describing either moments where an individual or group was identifying or connecting with the participant or moments when the participant was identifying or connecting with the group. This distinction is important because it suggests that inclusion results from both one-directional and reciprocal experiences.

The cluster of incidents where participant’s personal or professional identity was acknowledged were described as times when the participants were on the receiving end of a gesture or interaction that extended inclusion into the group or organization. These incidents were not initiated by the participant and were often unexpected. The cluster of incidents where participants utilized their professional skills to enact personal values were described as moments when the participant initiated some action that led to them feeling included in their workplace.
These moments resulted from the actions of the participant and generally on behalf of another individual or in service to the organization. However, the participant experienced a feeling of inclusion. These incidents were the result of sustained investments in the organization, like creating an LGBTQ affinity effort across the institution, or taking leadership over time in a staff advisory council. It is difficult to quantify but these experiences also seem to have more of a lingering effect, having occurred several years ago but still appearing as salient to participants when reflecting on critical moments of inclusion.

**Incident Type by Self-Concept and Identity Development**

The second sub-question explored was, how do these critical moments of inclusion impact professional staff member’s self-concept in their organizations? Throughout the study, notes were made of the ways that identity was impacted by the incidents described by participants. Inclusion is inextricably tied to identity. Inclusion is relational and the degree to which an individual feels they are accepted by the group they are a part of influences their sense of inclusion. The individual lived experience of inclusion occurs at the micro level but is impacted by the workgroup culture and norms (meso) as well as the organizational climate for inclusion (macro). The main question in this study was an inquiry about the micro level experiences of inclusion—times when the individual felt included. The interviews were used to probe for context related to the incidents as a way to understand the meso and macro levels of these interactions as well. In descriptions of these incidents several participants made note of the ways they view their identity and how that identity was impacted or influenced within these interactions. Participants referred to themselves and their identities throughout the interviews describing themselves as workhorses, straight shooters, independent, out of the box thinkers, mission-driven, and storytellers. The ways they viewed themselves influenced how they
experienced the incidents. Some incidents reinforced their views of themselves as competent, boosting their confidence and helping them to feel better able to do the job. Participant 13, who shared that when her supervisors asks for, listens to, and acts on her input she feels included described the impact this way. She shared:

And so, it’s like, okay, this feels like my lane, and you’re kind of respecting the fact that, or your recognizing that this maybe is my lane, you’re seeking my opinion, and then we’re moving forward, what I said, we’re not just gonna do what you thought anyway, you know, that feels very good.

Other incidents reinforced their value and self-worth by encouraging them to be themselves or to bring their full selves to work. Participant 23, who shared an interaction with her team early in her tenure described the feeling this way. She reflected:

There’s always like a touch of nervousness when you’re new in a job where you’re like, I don’t know, do I like them? Do they like me? But I think that it was like a comfort and a like, sense of peace. I don’t know if that’s quite the right word. It sounds a little bit more like lofty than maybe I mean it but it’s kind of the like, “Oh, this feels like a place where I can like really build something,”—you know, what I mean? Where I can be a part of this community and feel included and invest myself.

An interpersonal one on one interaction with a peer, allowed Participant 14 to feel more authentic at work. She described the feeling this way:

And I didn’t feel like I had to, like pretend . . . sometimes I feel like I have to when I’m talking with certain people, I feel like I have to pretend that I like something maybe that I don’t really like, but with her I was, you know, completely myself.

And at the organizational level, Participant 4, who shared building the LGBTQ affinity network at his university as generating a sense of inclusion described the feeling this way.

I think it’s at the core . . . the ability to truly be yourself and be comfortable being yourself. And, and not having to present differently or, you know, act differently. Not to be your full self, essentially, and bring that into, you know, not just when you go to meetings with similar members of your community, or tribe, but in general, across the board every day, you know, without having to worry about, well, I’m going into this meeting, so I need to tone it down, or, you know, I need to wear a suit on this day, like, being able to be truly who you are, the entire time and your entire experience.
The sub-questions were designed to understand the meso and macro levels of these interactions. At the individual level (micro) the participant is sharing the ways they felt about the degree to which they felt connected to the group. However, there is another way of examining interactions that involved others within the organization: the degree to which the group included the individual. This is a bit of a chicken and egg way of thinking because one does not necessarily proceed with one or the other: they are occurring simultaneously as the individual interacts in the system. This is a critical distinction in terms of understanding who ultimately is responsible for creating a feeling of inclusion for individuals within an organization.

**Summary of Findings**

This study sought to uncover the lived experiences of inclusion for professional staff in higher education. The research was designed to collect incidents to shed light on the experiences, moments and interactions that cause individuals to feel a sense of inclusion within the workplace. The 78 incidents offered provide a rich collection of narratives that bring to life these critical incidents of inclusion. The three clusters of incident types provide a framework for understanding the nature of these incidents. The themes that emerged from the cross-sectional analysis provide insight into the contextual factors that encourage these incidents to occur.

The three incident clusters that emerged in the study demonstrate the importance of both belongingness and authenticity to the experience of inclusion. Participants described powerful moments when their personal or professional identity was acknowledged and affirmed. These moments provided signals or cues to the participant that they belong. The participants described feeling seen and respected and valued. Participants also shared experiences when their core values and desire to influence those around them was enacted. These incidents reinforced the participant’s ability to be authentic in their workplace because they were able to use their
personal or professional skills to include others. The participants described feeling more comfortable being themselves and experiencing deeper satisfaction and fulfillment in their work. This distinction between incidents that promote belongingness and those that promote authenticity is also reflected in the two forces driving the experience of inclusion for participants. In those incidents where the participant’s personal or professional identity was affirmed, the actions of others drove the experience. In the incidents where the participant was able to use their skills to enact their personal values, it was the actions of the participant that caused them to feel a sense of inclusion.

The contextual factors discovered in this study help to explain the complexity of the experience of inclusion for participants. The incident descriptors provide insight into where and when these incidents occur and who is involved. The incidents did not involve only one stakeholder or occur at one specific level. There is potential at all levels within the organization for inclusion to be enabled, and everyone can create a sense of inclusion for others, including the participants. While interpersonal interactions were commonly described, the impact of the divisional or organizational culture is also important. Similarly, while leaders are often involved in exchanges that lead to participants feeling included, co-workers were the most likely to be involved. Incidents that occurred within the last year were common, but the incidents that happened over ten years ago seemed to have as great an impact. This complexity may make it difficult to categorize these incidents, but also provide practitioners with a variety of ways to enable inclusion rather than simply working to prevent exclusion.
CHAPTER V: INTERPRETATION OF FINDINGS AND RECOMMENDATIONS

Study Overview and Significance

Professional staff represent most of the employees at colleges and universities in the United States but are rarely the focus of research in higher education (Harris, 2019; Marcus, 2000; Riffe & Barringer, 2021; Sánchez et al., 2020; Smith, 2020). Little is known about how professional staff experience the workplace because they are valued only for their contributions to faculty and/or students (Curran & Prottas, 2017; Graham, 2012). In an increasingly tight labor market, professional staff are leaving higher education at alarming rates, disillusioned with the culture and climate. This research addresses the gap in the literature by centering the lived experiences of professional staff in higher education and provides practical guidance for leaders working to attract, develop, and retain this critical resource.

The main research question in this study was as follows: What are the experiences, interactions, and moments that cause professional staff to experience a sense of inclusion in their workplace? The 23 participants, who identify as professional staff members at small and medium-sized colleges and universities in the United States, were asked to recall and share times when they experienced inclusion at work. Workplace inclusion research has continued to evolve (Ferdman & Deane, 2014; Mor Barak & Cherin, 1998; Nishii & Rich, 2014; Offermann & Basford, 2014) and organizational (Offermann & Basford, 2014; Roberson, 2006; Sabharwal, 2014) and leadership practices (Booysen, 2014; Nembhard & Edmondson, 2006; Randel et al., 2018) that encourage inclusion have been identified. Employees who feel included in the workplace have higher performance levels and are more likely to remain with the organizations (Cho & Mor Barak, 2008; Mor Barak & Levin, 2002). Despite the proliferation of research and the growing understanding of the practices, policies, and positive outcomes of inclusive
environments, little is known about the psychological experience of inclusion in organizational settings, and it remains largely undocumented among professional staff in higher education. This study was intentionally designed to contribute to the growing inclusion literature by elevating the experiences of professional staff in higher education settings. Several frameworks have been presented to conceptualize and measure the psychological experience of inclusion (Jansen et al., 2014; Shore et al., 2011), but only some employee narratives of how inclusion is experienced exist (Goosby Smith, 2021). To the best of my knowledge, this is one of few qualitative studies of inclusion and the only study, based on my literature search, that explores the inclusion experiences of professional staff in higher education.

The findings in this study reveal the lived experience of inclusion for professional staff and provide insight into the complex and undertheorized phenomenon of workplace inclusion. Using a constructivist Critical Incident Technique (CIT) approach, the 78 incidents collected from 23 participants provide detailed descriptions of the inclusion incidents and context surrounding those experiences at various levels within the organization. This approach also expands the use of CIT as a methodology in higher education and in research involving professional staff. A positive organizational scholarship lens (K. S. Cameron & Spreitzer, 2012) was applied to interpret the findings and helped uncover the more generative ways professional staff experience the workplace. This chapter provides a discussion and interpretation of the key findings, recommendations for practice and future research based on these findings, and a reflection on the research process.

**Discussion and Interpretation of Key Findings**

Professional staff in higher education represent a variety of fields and functions. Colleges and universities rely on these employees to develop and share the brand with external audiences,
enroll and support the curricular and co-curricular efforts of students, solicit, and control the finances that keep the institution solvent, maintain the technological infrastructure, and develop the human resources that enable the educational experience, among other essential tasks. While the literature often reduces professional staff to the functions they complete, professional staff are much more than the roles they inhabit. Task autonomy, or what someone is allowed to do within the context of an organization, is separate from identity autonomy, or whom a person is allowed to be within the context of an organization (Deci & Ryan, 1991; Jansen et al., 2014). The findings in this study provide insight into both task and identity dimensions of the organizational experience of professional staff. A discussion of the key findings and the interpretation of those findings follows.

Overview of Findings

The inclusion incidents described in this study include moments when alignment is created between a professional staff member’s self-concept and the signals or cues that a person, a team, or the organization sends to that individual. Figure 5.1 presents a definition of professional staff feelings of inclusion and the incident types and pathways to feelings of inclusion that emerged in this study. Overall, the findings reveal no one way that inclusion is created for professional staff, and no single group or person initiates these incidents. Instead, there are multiple pathways to inclusion for professional staff, and everyone within the organization can cause others to feel included. The findings also demonstrate that inclusion is relational and inextricably linked to organizational identity work. The degree to which the actions of others affirm the professional staff member’s sense of self had a direct impact on their experience of inclusion. All professional staff in this study also identified a moment when they were made to feel included, irrespective of their social identity or position within the
organization. Inclusion is, therefore, an experience that anyone can have and is not only reserved for those in minoritized groups. Professional staff in this study also frequently described feelings of belongingness and authenticity as outcomes of these inclusion incidents. Uniqueness was described less often and did not appear as relevant for all the participants in this study.

**Figure 5.1**

*Pathways to Inclusion for Professional Staff in Higher Education*

Two key findings emerged from these observations from the data. The first was the identification of two main pathways to the experience of inclusion for professional staff—the Affirmation Pathway and the Impact Pathway. The six types of incidents described in these pathways illustrate findings in prior workplace inclusion literature and provide practical guidance for leaders. The second key finding expanded existing definitions and frameworks for workplace inclusion by providing further evidence that supports the addition of the concept of authenticity. Emerging from the detailed descriptions of the inclusion incidents provided by professional staff, a reconceptualized definition of inclusion that adds a value for authenticity to the existing definition of workplace inclusion as the satisfaction of the need for belongingness and uniqueness is presented. Additional findings are also shared.
Key Finding #1: Two Pathways to Inclusion

Analysis of the incidents shared by professional staff revealed six distinct incident types that clustered into three overall categories; incidents that align with personal identity, professional identity, or personal values. While the shared incidents differed in context and character, the interaction or moment described in each category conformed to similar patterns. Most of the incident types clustered into two categories where cues were provided that the professional staff member’s personal or professional identity was aligned with the person, team, or organization. The remaining incidents were less frequent but were experienced by half the participants. The incidents in this third category represented moments of alignment with personal values held by the participant, not with their personal or professional identity. In addition, the incidents in this category were initiated by the professional staff member, not by someone else. This analysis led to the discovery of two distinct pathways to inclusion for professional staff, the affirmation, and the impact pathways.

Affirmation Pathway

The majority of experiences shared in this study described interactions with others when the professional staff member’s personal or professional identity was affirmed. These experiences are captured in the affirmation pathway. Feelings of inclusion surfaced due to invitations to social gatherings, gestures of caring or support, requests for advice or input, and encouragement to take leadership roles. Every participant described at least one incident that included some element of these types of incidents suggesting that the most common pathway to inclusion is through one of these experiences. Analysis of the frequency with which incidents occur in critical incident technique methodology is one way to search for insight into the context or nature of incidents (Bott & Tourish, 2016). The incidents in the affirmation pathway can be
described as archetypical events (Bott & Tourish, 2016), more common events that have significance for the participants. The outcomes of these interactions included strong emotional reactions like feeling seen, valued, connected, and respected. The incidents in this pathway occurred primarily at the interpersonal level within the organization and impacted the professional staff member’s personal, relational, and social identity.

**Inclusion as a Relational Practice.** The experiences shared in this study confirm the conceptualization that inclusion is a relational practice that occurs at all organizational levels (Booysen, 2014; Ferdman, 2014). Most of the incidents shared involved interactions with others within the organization. While the literature on workplace inclusion often focuses on the leader and the role of the leader in creating inclusive environments (Nembhard & Edmondson, 2006; Nishii & Mayer, 2009; Randel et al., 2018), in this research, individual colleagues or teams were the most commonly cited initiators or participants in the inclusion incidents described by professional staff. While organizational leaders were noted as influencing the climate and culture that allowed these inclusion incidents to emerge, the incidents themselves were equally likely to involve those without positional power in the organization. This research also confirms that while organizational practices impact an individual’s ability to experience inclusion, interactions with others, primarily peers, are essential to creating inclusion (Blatt & Camden, 2007). Therefore, the power of an invitation to socialize, displays of support and sympathy, and requests to share content expertise cannot be ignored as influential avenues to enhance professional staff members’ sense of inclusion in the workplace.

In addition to colleagues and team members, individuals who typically hold positions of authority or influence, like administrators and faculty were also identified in almost a third of the incidents. This finding suggests that power dynamics are critical in creating inclusion for
professional staff. Organizational leaders are understood to be influential in creating organizational climates that promote inclusion (Booysen, 2014; Nishii & Mayer, 2009). The incidents offered, like phone calls from the president to welcome a new staff member to the university or conversations about personal challenges faced between a faculty member and staff member, also point to the importance of interpersonal interactions between professional staff and administrators and faculty. Participants also noted the additional significance these gestures had because they were being offered by individuals with authority within the organization.

The professional staff member’s direct supervisor was also involved in a small proportion of the incidents shared but did not have the same influence these other parties had in creating a sense of inclusion. This is surprising given the attention that is paid in the literature to inclusive leadership practices. Direct supervisors are not absent in this study, and inclusive practices are described as important to creating inclusion. They are just not as frequently identified by professional staff as initiating the experiences that lead to a sense of inclusion. Surprisingly, despite almost half of the participants being in student-facing roles, students were rarely involved in the inclusion incidents shared. This suggests that while interactions with students are essential to the work of many in higher education, it is other employees who have the most influence on the creation of inclusion for professional staff.

**Positive Identity Development.** The incidents shared in the affirmation pathway signaled to the professional staff member either an acknowledgment of their personal or professional identity. Often people compartmentalize their ideas of themselves in the workplace. However, what is described in these incidents is a sense that the professional staff member was being seen as only one or the other, and these moments of inclusion stood out because they represented experiences where the professional staff member was seen as multidimensional. For
example, Participant 2 described the impact these experiences have had on his sense of identity over time this way: “I think I started my career very compartmentalized like this is who I am at work, this is who I am at home. I’ve seen myself sort of grow into having a much more concentric circles view.”

In the case of personal identity acknowledgment incidents, professional staff members described being seen as more than their role or position in the organization. Someone relates to them as a person, not a “human resource,” which creates a feeling of inclusion. In the case of professional identity acknowledgment incidents, a professional staff member is recognized for their skill and expertise. Someone relates to them as a content expert, which signals a valuing of their contributions, not just their presence which leads to a feeling of inclusion.

The findings in this study support the research that employees are constantly navigating their identity in the workplace at various levels (Brewer & Gardner, 1996; Sedikides & Brewer, 2001) and enacted through multiple means (Morgan Roberts & Creary, 2013). Professional staff in this study described engaging in sensemaking at the individual level to define their self-concept or sense of self. At the interpersonal level, professional staff described shaping their identity by aligning their role with their sense of self. And at the collective level, professional staff described engaging in self-categorization to understand their social identities within the organization. Tensions exist between these levels, but as pictured in Figure 5.2, opportunities to integrate these different self-concepts can produce positive outcomes that lead to feelings of inclusion. This study sheds light on how professional staff make sense of this identity navigation at these levels by talking about their experiences of identity affirmations in the workplace.
Positive identity construction is not one-sided. Positive identities are created and recreated in the context of interactions in the workplace. LeBaron et al. (2009) described boundary moments, or pivotal moments in a person’s workplace experience, like developing a new connection or starting a new job, as fertile ground for creating a positive workplace identity. The experiences described in this study offer a snapshot of boundary moments for the participants. Professional staff members shared moments when there was harmony, rather than tension, between their personal identity and what was reflected back to them by others or the organization. Experiencing and remembering these moments of harmony helps professional staff members engage in a sensemaking process that aligns their personal identity with the organization. For example, Participant 1, a new professional, described replaying the comments of her team members that she is “not here because of what you can do, you are here because of who you are” back to herself as a kind of mantra. The inclusion incidents in the affirmation
pathway support the concept that positive identity is not a fixed construct. It is instead a process of becoming rather than a state of being (Morgan Roberts & Creary, 2013).

**Impact Pathway**

A cluster of incidents emerged during analysis that were less frequent and did not conform to the more common affirmation incident types. These 17 incidents, offered by 14 participants, described experiences where the professional staff member took some action that impacted either an individual or the entire organization. These incidents are captured in the impact pathway.

The incidents in the impact pathway can be described as atypical events (Bott & Tourish, 2016), happening less frequently but having high salience. The professional staff member led a strategic initiative or had an interpersonal experience that impacted the organization or an individual. The emotional reactions to these experiences were strong and more enduring than other incidents. Participants who shared these incidents also felt seen and connected and described a sense of fulfillment and satisfaction and increased comfort in being their full selves due to these experiences. The experiences in this pathway are more memorable, with half of the incidents that occurred more than five years ago occurring in this pathway. Unlike the more common affirmation pathway that is predominantly self-directed, resulting from the group signaling to the participant that they are included, the impact pathway is primarily other-directed, resulting from the participant feeling that their actions are improving the circumstances of others and are aligned with the values of the organization. These incidents also seem to have more of an impact on the professional staff member’s relational identity. Participants described interpersonal interactions that helped them to define and align their sense of self with their role in the organization as contributing to their sense of inclusion.
**Positive Deviance.** Most of the inclusion incidents shared in this study recount actions taken by others that caused the participants to feel included in the workplace. However, the incidents that emerge in the impact pathway reflect experiences or interactions initiated by the participant that caused them to feel included. For example, Participant 7 spoke out at a division meeting, Participant 17 and Participant 9 facilitated staff advisory councils, Participant 3 helped to unionize the staff, and Participant 4 created an LGBTQ affinity network on his campus. Their behavior in these moments supports the definition of positive deviance put forth by Spreitzer and Sonenshein (2003) as intentional behaviors that depart from the norm and improve the human condition. The voluntary actions taken by the professional staff members in the impact pathway represented a departure from expected behavior that improved the conditions of individuals in their organization. While well-being, increased effectiveness, and high-quality relationships are regarded as outcomes of positively deviant behavior (Spreitzer & Sonenshein, 2003), the findings in this study suggest that a sense of inclusion can also emerge.

Behavior can be thought of as happening on a continuum from negatively deviant behavior to expected behavior to positively deviant behavior. Exclusion may be considered negatively deviant behavior, intentional behavior that departs from the norm that worsens the human condition. Inclusive behavior sits on one end of the continuum, working to improve the human condition. Bateman and Porath (2003) called this transcendent behavior described as “self-determined behavior that overrides constraining personal or environmental factors and constructively changes oneself or one’s environment” (p. 122). Research tends to focus on negatively deviant behavior within organizations, but there is much to learn by exploring transcendent or positively deviant behavior.
Spreitzer and Sonenshein (2003) described five psychological conditions that facilitate positively deviant behavior. Experiencing personal meaning, being other-focused, and having high levels of self-determination, personal efficacy, and courage make it easier for individuals to take actions that deviate from the norms of behavior within their teams, divisions, or organizations. Examples of these conditions are evident in the descriptions offered by participants. Participant 3 was reluctant to join the effort to unionize. Still, when she began to feel the president was eroding the university’s communal character, she felt compelled to act because she found personal meaning in the effort. The professional staff members who offered incidents in the impact pathway described a sense of agency and autonomy that propelled them to act. Despite being new to the organization, Participant 9 reached out to the vice-president of his division to advocate for a staff task force to create social activities to bring people together. The alignment that the professional staff members felt with their personal values and the initiatives they were able to lead or interactions that were a part of creating a feeling of inclusion that is different than what was described in the affirmation pathway.

**Summary of Key Finding #1: Two Pathways to Inclusion**

Professional staff experience inclusion in the workplace through two pathways—the affirmation and impact pathways. In the more common affirmation pathway, feelings of inclusion emerged from experiences or interactions where the professional staff member’s personal or professional identity was affirmed. Participants were recognized as multidimensional beings who are more than their identity or role through invitations to socialize, expressions of support or care, requests for advice or guidance, and encouragement to take on new responsibilities. In the less common impact pathway, feelings of inclusion emerged when professional staff members took some action that impacted an individual or the organization.
Participants experienced a deep sense of fulfillment and satisfaction resulting from their leadership of efforts to organize staff, create dialogue space, and establish councils and advisory groups.

The incidents described in these pathways represent cues or signals from individuals, groups, or the organization that there is alignment between the professional staff member’s sense of self or values and the organization. The experience of inclusion emerges as a communal experience with others in the organization, not in isolation, reinforcing the understanding of inclusion as a relational practice. These interactions, particularly during boundary moments, promote the development of positive identity development in the workplace. Although less common, inclusion also emerges during experiences when professional staff members are encouraged to enact their values in the workplace. These acts of positive deviance, which are sanctioned by the university or members of the community, provide powerful signals to professional staff members that they are included.

Key Finding #2: Expanding Existing Workplace Inclusion Definitions and Frameworks

The primary identity that all participants in this study shared was that of a professional staff member. However, participants represented various intersecting social identity dimensions that included majority and minority identities across several social identity categories like gender, sexual orientation, and race. Every participant, irrespective of their social identity, was able to describe a moment when they were made to feel included in the workplace. Inclusion research generally centers on the experience of individuals in the minority and typically focuses on one dimension of identity at a time (Ortlieb et al., 2020; Purdie-Greenway & Davidson, 2019). This approach does not acknowledge the intersectional nature of identity and how that complexity impacts individuals’ workplace identity development or lived experiences in the
workplace (Atewologun et al., 2016; Caza & Wilson, 2009). The findings in this study demonstrate that anyone, even those holding majority group identities, can experience inclusion in the workplace and that more intersectional approaches to workplace inclusion research may be beneficial.

The prevailing definitions and frameworks used to describe workplace inclusion do not fully explain the findings in this study. Inclusion as a psychological state at the work-group level has been defined as “the degree to which individuals experience treatment from the group that satisfies their need for belongingness and uniqueness” (Shore et al., 2011, p. 1265). The inclusion incidents shared in this study reinforce the assertion that the group is responsible for including the individual and illuminate the nature of the treatment referenced in this definition.

Descriptions of a sense of belongingness emerged as an outcome across all types of experiences participants shared, reinforcing the use of that concept in the definition. However, a sense of uniqueness, was not a prominent outcome in this study. While a sense of uniqueness was described in four incidents, it was less common and was mentioned only by professional staff in marginalized groups. This suggests that a focus on uniqueness alone does not adequately explain the experiences of professional staff, especially those—like White male participants—whose most salient identities were in the dominant group on their campus. Feelings of authenticity were more commonly described across all participants, suggesting this construct may provide a more intersectional view of the findings. Participants across all social identity groups reported that feeling like they could be their full or true selves was an outcome of these inclusion incidents.
As a result of these findings, an expanded model of workplace inclusion that combines belongingness, uniqueness, and authenticity is presented as a model that more accurately reflects the lived experiences of workplace inclusion.

The most cited definition, framework, and scale for work-group level inclusion is that of Shore et al. (2011). Less often cited inclusion definitions, frameworks, and scale are from Jansen et al. (2014). These definitions are almost identical; however, instead of a balance between belongingness and uniqueness, as suggested by Shore et al. (2011), Jansen et al. (2014) suggested that authenticity, not uniqueness, more accurately explains the dynamics at play when inclusion is achieved. This shift in concept from uniqueness to authenticity stems from a criticism of the Shore et al. (2011) model and the use of uniqueness. Jansen et al. (2014) argued that “valuing group members only for the non-overlapping (unique) part of their identity is not sufficient to result in perceptions of inclusion [because] the more prototypical group members are, the less they benefit from others’ appreciation of uniqueness” (p. 371).

The primary identity that all participants in this study shared was that of a professional staff member. However, they represented various intersecting social identity dimensions that included majority and minority identities across several social identity categories like gender, sexual orientation, and race. Every participant, irrespective of their social identity, was able to describe a moment when they were made to feel included in the workplace. Inclusion research generally centers on the experience of individuals in the minority and typically focuses on one dimension of identity at a time (Ortlieb et al., 2020; Purdie-Greenway & Davidson, 2019). This approach does not acknowledge the intersectional nature of identity and how that complexity impacts individuals’ workplace identity development or lived experiences in the workplace (Atewologun et al., 2016; Caza & Wilson, 2009). Professional staff hold a variety of identities,
including visible and invisible, and may be in a dominant group in one context in the workplace and a subordinate group in another. Feelings of exclusion may also be tied to other aspects of their identity than the demographic characteristics. The findings in this study demonstrate that all professional staff benefit from these moments and experiences of inclusion, so a more intersectional approach to workplace inclusion research may be beneficial to uncover all the ways inclusion is being created and experienced.

To refine the model from Shore et al. (2011), Jansen et al. (2014) drew on self-determination theory (Deci & Ryan, 1991) which focuses on the balance between relatedness and autonomy instead of the need for similarity and individuation proposed by Brewer (1991) which the Shore et al. (2011) model draws on. Instead of focusing on how an individual is different from the group, which is the focus of uniqueness, authenticity focuses on the degree to which the individual is allowed by the group to act in ways that reflect their values and sense of self. This conceptualization differs from the one proposed by Shore et al. (2011) because the focus is on the degree to which the group signals to the individual that it is ok for them to be themselves instead of to be different.

The findings in this study support the argument that authenticity as a construct allows a more extensive interrogation of the experience of inclusion because it acknowledges the intersectional nature of identity and the need for people with majority identities to experience inclusion within organizations (Jansen et al., 2014). While belongingness is clearly articulated as an outcome, the findings suggest current workplace inclusion definitions, frameworks, and scales would benefit from the addition of authenticity as an essential element in the creation of inclusion (Figure 5.3). Extension of the current models that combine belongingness, uniqueness and authenticity measures when describing and researching work-group inclusion would allow a
more intersectional approach to the research and understanding of workplace inclusion. A discussion of the findings that illustrate the relevance of these three concepts to the experience and definition of workplace inclusion follows.

**Figure 5.3**

*Expanded Model of Workplace Inclusion Definition and Framework*

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**Belongingness**

Descriptions of belongingness emerged across both inclusion pathways and all demographic groups within the study. Professional staff felt a sense of belonging that resulted from these high-quality connections (Dutton & Heaphy, 2003) and experiences of mattering (Prilleltensky et al., 2020). The relationships established with others through invitations to social gatherings or moments when their opinions and perspectives were valued sent signals that they
belong in the organization. This contributed to a feeling of inclusion by satisfying the participants’ needs for connection and relevance. These findings affirm the relevance of this framework component in the experience of inclusion in the workplace.

Belongingness is defined similarly in both the Shore et al. (2011) and Jansen et al. (2014) frameworks as “the need to form and maintain strong, stable interpersonal relationships” (Shore et al., 2011, p. 1264). The incidents shared by participants included several examples of interactions with colleagues that helped to create the foundation for positive work relationships (Ragins & Dutton, 2006). Most of these incidents were not long in duration or very complex. Instead, they can be considered small acts of connecting (Blatt & Camden, 2007) that provide momentary feelings of closeness between people in a work setting. These incidents are not isolated and can work together to create what Kahn (2006) referred to as “positive spirals” of experiences that cause professional staff members to sustain a feeling of inclusion at work. For example, Participant 4 shared an inclusion incident where he felt supported by his team and the organization after a parent passed away. The feeling of inclusion was not isolated to one interaction but was described as the cumulative effect of these interactions over the course of a week. He recounted:

It was really that first week that was the moment. It wasn’t when I told [his supervisor], it was really what developed and solidified over the course of that next week. It was just the different people, and the diversity of people, and the roles and departments that I discovered were supportive of my personal needs.

These interactions combined deepened his relationships with these individuals even though he had been working with them for several years.

High-Quality Connections at Work. Belongingness is one of the positive outcomes of high-quality connections (Dutton & Heaphy, 2003). When employees experience HQC, they describe feelings of closeness and vitality, positive regard, and mutuality. Professional staff
shared incidents that illustrate these feelings as outcomes. For example, Participant 15 has developed connections with other members of the leadership through personal and professional interactions with the group and described the bonds that have been created this way,

I have several peers who I’ve formed really strong kind of connections with. There’s a level of trust . . . to be very critical of one another and then utilize that to make each other better. And I feel equally comfortable sharing something with them as I do kind of commenting and giving feedback in return. It feels like I have this group of trusted peers that I feel a lot more connection with.

High-quality connections (HQC) are the connective tissue between individuals that can be either life-giving or life-depleting (Dutton & Heaphy, 2003). These connections exist in all organizations, but the quality of those connections determines whether they result in positive or negative outcomes for employees.

**Mattering at Work.** The concept of mattering emerged in a few of the descriptions of belonging offered by participants as well. For example, Participant 13, who shared an incident when her supervisor actively listened to and acted on her input, described the feeling of belongingness that emerged from the interaction this way, “I feel like I matter in this moment, I’m valued and I’m included in this community.” Or Participant 8, who offered an interaction with a faculty member who was asking for his advice, described the feeling that gave him this way: “I was flattered . . . It does make you feel valued. And it does make you feel like you’re appreciated in the work that you do . . . when you have those moments, it does make you feel that you matter.”

The literature on mattering provides some insight into the experience of belongingness in these inclusion incidents. Belonging and mattering are related but separate concepts that describe an individual’s need to feel seen by others and needed by others (Rosenberg & McCullough, 1981). Mattering is described as “feeling valued by self and others, and the experience of adding value to self and others” (Prilleltensky et al., 2020, p. 89). For employees in a higher education
context, the feeling of being seen and adding value is shown to be occurring at multiple levels, including interactions with colleagues, supervisors, and the organization (Prilleltensky et al., 2020). Participant 10, who recalled his participation in a team meeting led by his supervisor early on in his role at the university, described what was happening during the interaction that caused the feeling of belongingness this way: “I wasn’t in a prescribed box. And my thoughts were appreciated. And they were heard. And they were reacted to. And someone else had a further idea. And it was a great collective experience.” In this description, Participant 10 was connected to the team because he and his contributions were being valued and were adding value at multiple levels.

People can feel they belong in an organization without feeling included, especially if they are asked to sacrifice some part of who they are to belong (McCluney & Rabelo, 2019; Schmader & Sedikides, 2018). The feelings of mattering or the high-quality connections created for professional staff in this study also included descriptions of a value for the individual and their sense of self. These participants did not describe being asked to sacrifice any part of who they are or how they see themselves. The inclusion literature describes inclusion as either a balance (Shore et al., 2011) or a tension (Ferdman, 2017) between the need for belonging and uniqueness or authenticity. The incidents recounted in this study suggest that balance is achieved, or the tension is managed when alignment occurs between the individual’s sense of self and the signals being sent by the group. Inclusion emerged in moments when participants not only felt a sense of belonging, as described above but also felt they were valued for how they are unique (Shore et al., 2011) and that they could be the most authentic version of themselves (Jansen et al., 2014).
Uniqueness

A few participants in this study described uniqueness as an outcome of the inclusion incident. Every participant shared an incident where their personal or professional identity was validated in some way. What distinguished the incidents where uniqueness was described was that the professional staff member received the message that it was ok to be different in an environment where they were in the minority. Uniqueness was often discussed in the inclusion incidents shared by professional staff members in minoritized social identity groups within their organizations—for example, people of color in predominantly PWIs or staff who identify as gay or lesbian. The incidents they shared described experiences where their demographic differences were acknowledged and affirmed in some way. This typically occurred in affinity group spaces, separate from the majority group within an organization, or as the result of experiences where they were not in the minority regarding the people working in or the people served by the department. For example, Participant 7, who identifies as a woman of color, shared what it feels like to navigate the tension between belongingness and uniqueness at work by accessing affinity spaces:

I’m finding places and spaces where I can, you know, dig in deep and get the feelings of connection and solidarity that I otherwise don’t have at work. I enjoy a lot of my coworkers and all that stuff, but it’s helpful to find those spaces where you don’t have to explain yourself.

Shore et al. (2011) defined uniqueness as “the need to maintain a distinctive and differentiated view of oneself” (p. 1264). The quote from Participant 7 seems to reflect this definition because the affinity spaces provided by the organization are described as a place where the professional staff member can be among others who share their identity and not have to conform in any way.
There is a difference in the degree to which universities allow individuals to express their individuality or uniqueness. The value placed on inclusion for students, for example, is different from that for employees. Participant 13, who identifies as a Black woman, became a staff member at her alma mater and described how her perception of the degree to which her uniqueness was welcomed shifted. She stated, “As a student, [her university] really empowered me to be my full self. And then, as a staff member, you learn that they want you to maybe trim some of those edges.”

The university actively encouraged her uniqueness as a student. Still, when she became a staff member, she began to feel a new pressure to conform or to create what Hewlin (2009) referred to as “facades of conformity” (p. 727). She explained:

> It’s that constant battle about how authentically can I show up? That’s just something that I am always going to go through as a Black woman. I feel I’m tasked with navigating how much of my authentic self can I bring to this space? Is it okay because it’s not always a safe thing to do.

While a value for uniqueness is the emphasis of what is being discussed by these participants, an important finding is that participants were also describing a need for authenticity in these interactions. The inclusion incident allowed them to feel a sense of belonging, and they received signals that there was a value for uniqueness, but they also spoke to wanting to feel authentic in the workplace and in these moments. One did not seem disconnected from the other. Receiving cues that uniqueness is valued was still important even when a sense of authenticity existed. For example, Participant 18 stated:

> It’s important that we do have affinity spaces in this institution, right? We find them important, even for those of us who are in colleges or units, where we feel super well connected, heard, you know, authentic, all of that stuff. I can be myself unapologetically, I don’t have to placate, in order to be accepted here.

The focus on uniqueness as a construct rather than on authenticity may speak to the assumption that inclusion is only for those in the minority. The findings in this study demonstrate
that anyone can be included and feel a sense of inclusion in the workplace. The prevailing models of workplace inclusion, however, speak primarily to a value for uniqueness and rarely discuss authenticity (Korkmaz et al., 2022; Park et al., 2022). In this study, the reverse was true. Uniqueness was rarely described, and when it was, it was also accompanied by descriptions that reflected a value for authenticity as well.

**Authenticity**

Authenticity emerged as an outcome in several of the incidents described in this study. Professional staff experienced alignment between their sense of self through the incidents in the affirmation pathway and their values in the impact pathway. That alignment resulted in a sense of authenticity which Jansen et al. (2014) defined as “the extent to which a group member perceives that he or she is allowed and encouraged by the group to remain true to oneself” (Kernis & Goldman, 2006, p. 372). These descriptions of authenticity also seemed to be very pronounced in the experiences shared through the impact pathway when participants were enacting their values to serve the organization or an individual (Hewlin, 2016). For example, Participant 4 helped to establish an LGBTQ affinity network at his university which changed his experience of the workplace. He described the feeling of inclusion that developed this way.

At its core, it was the ability to be yourself and be comfortable being yourself truly. Not having to present differently or, you know, act differently. To be your full self, not just when you go to meetings with similar members of your community or tribe, but in general, across the board every day, you know, without having to worry about, “well, I’m going into this meeting, so I need to tone it down,” or, you know, “I need to wear a suit on this day,” like, being able to be truly who you are, the entire time and your entire experience.

Although connected to a minoritized demographic identity, Participant 4 seems to be commenting not on the degree to which he was allowed to maintain a distinct view of himself but instead the way he was allowed to be himself within the environment.
**State Authenticity.** The findings in this study reinforce the concept that inclusion is relational (Booysen, 2014; Ferdman, 2014) and that inclusion is determined by the group, not the individual (Jansen et al., 2014). The level or degree to which an individual feels who they are is aligned with the environment in which they work is an indicator of state authenticity, defined as “the sense of being oneself when valued aspects of one’s identity are aligned with, if not validated by, the situation” (Schmader & Sedikides, 2018, p. 228). This is distinct from trait authenticity, which is not defined by the situation but is an internal sense of who you are. Schmader and Sedikides (2018) contended that “state authenticity is experienced when aspects of the self and identity are a fit to the surrounding environment” (p. 230). Inclusion does not happen in isolation. The situation or environment, in this case, the workplace, provides the backdrop for these inclusion incidents. Inclusion occurs when there is alignment between the individual’s sense of self and the cues they receive from the environment.

The ease with which an individual can navigate their environment is one indicator of the level of state authenticity experienced. Schmader and Sedikides (2018) described the experience of state authenticity as fluency which occurs at three levels—personal, interpersonal, and collective. *Cognitive fluency* is experienced when the environment provides cues that the individual can be themselves. *Interpersonal fluency* is experienced when others signal that the person can be themselves. And *motivational fluency* is experienced when a person feels their goals are aligned with the organization’s goals. The concept of state authenticity is still in a nascent stage of development, but the findings in this study expand understanding of the experiences that create these levels of fluency.

Most of the experiences in this study focused on interpersonal interactions that helped professional staff feel the cognitive and interpersonal fluency described. The affirmation
pathway is dominated by inclusion incidents that represent cues or signals received by the professional staff member that they can be themselves. Participant 5, who identifies as a White male, felt included when he was asked to present to university leadership about a project. He described the feeling of cognitive and interpersonal fluency this way: “It truly felt as though I could be my authentic self... I wasn’t stuffy or I didn’t have to worry about the words that I was saying. I could just get up there and present.”

The inclusion incidents in the impact pathway, although less common, provide cues to the professional staff member that their values or goals are aligned with the organization increasing their motivational fluency. This helps to explain why authenticity is strongly connected to the experience of inclusion for professional staff members.

State authenticity is not guaranteed in the workplace. Professional staff are sometimes incentivized by the organizational culture or the nature of their job to hide aspects of who they are to be effective or advance (Hewlin, 2009). Experiencing high levels of state authenticity can counter or provide moments of reprieve from these feelings. For example, Participant 14, who shared about feeling included during a ladies’ night outing with colleagues, described her perception of the expectation of alumni engagement professionals and her experience of belongingness and authenticity this way.

I was able just completely to be myself. I feel like when you are in that position [alumni engagement], you have to almost play a role and always be on, and that gets tiring. And even though it is one of my strengths, being able to talk with people and be on, sometimes it’s just nice to be yourself... I was a part of the team too.

These descriptions of the outcomes of inclusion incidents support the addition of authenticity as a construct in the workplace inclusion definitions and measures.
Summary of Key Finding #2: Integrating Workplace Inclusion Definitions and Frameworks

Existing workplace inclusion definitions (Jansen et al., 2014; Shore et al., 2011) do not adequately reflect the lived experiences of inclusion described by professional staff in this study. The findings support the combination of belongingness, uniqueness, and authenticity to create an expanded description and model of workplace inclusion that more accurately reflects the lived experience of individuals than does any existing models on their own. In combination, these three constructs more thoroughly capture the psychological experience of workplace inclusion not only for those in minoritized groups but also for those whose identities are in the majority. The findings further help to distinguish between the experience of trait and state authenticity as conditions in the workplace. Trait authenticity is internal whereas state authenticity is contextual and determined by the situation. The descriptions offered by participants provide valuable insight into the distinction between the cognitive, interpersonal, and motivational fluency described in models of state authenticity in the workplace.

To exclude discussions of state authenticity in examinations of workplace inclusion limits understanding the complexity and promise of workplace inclusion. Recent reviews of inclusion climate and leadership (Korkmaz et al., 2022; Park et al., 2022) do not even mention or dismiss authenticity as a measure despite the existence of a validated scale (Jansen et al., 2014). Based on the rich descriptions provided by professional staff in this study, we would benefit from more attention in the literature on the role of authenticity in creating inclusion in the workplace. While uniqueness remains an important balance for belongingness for individuals in minoritized groups, authenticity provides a balance for a broader array of people. The findings suggest an expanded conceptualization of workplace inclusion defined as the degree to which an individual...
receives cues from individuals, teams, or the organization that they belong, they can be authentic, and that their uniqueness is valued.

**Additional Findings**

**Inclusive Leadership**

The use of critical incident technique allowed for the exploration of contextual factors leading to the inclusion incident. Several participants describe actions taken by leaders within their organization to create a climate that allowed these inclusive moments to emerge. The incidents in this study demonstrate how employees experience these inclusive leadership practices, and how these practices resulted in a feeling of inclusion for the professional staff member. The findings further demonstrate that creating a climate for inclusion is not the same as experiencing inclusion. Similarly, the connection between practices and employee-felt inclusion is not explicit (Buengeler et al., 2018) so the incidents offered here provided additional insight. For example, common, inclusive leadership practices include the intentional creation of diverse teams, transparent communication, connecting individual skills to assignments, and encouraging contributions (Downey et al., 2015; Randel et al., 2018; Roberson & Perry, 2021). During our conversation, Participant 7 spoke at length about her supervisor’s inclusive leadership style, providing descriptions of her efforts to create an inclusive environment for the team. She shared this description of her supervisor:

> She’s incredibly transparent about what’s going on here. And it is great for trust. It’s like, just a demonstration of her trust in us. And it’s a really good culture that she’s built within the team . . . We get real with her. And we feel like we can be honest with her. She doesn’t discount what we say.

Participant 7 stated that one of her inclusion moments—when she had spoken out at a division meeting—had been enabled by this inclusive climate and the inclusive leadership practices of her supervisor. Her supervisor had told the team about an upcoming campaign and
allowed them to provide feedback. This willingness to include the group in decision-making, solicit and encourage diverse opinions, and transparency in discussing the weaknesses of the campaign had helped Participant 7 to feel comfortable enough to speak up during the meeting.

**Temporal and Bounded Nature of Inclusion**

Professional staff members who participated in this study described the experiences of inclusion as transient. At the time of the incident, participants had felt various emotions that caused them to feel included in the workgroup or organization. However, many participants struggled to recall these incidents and indicated how difficult it was to think of instances to recount—which implies that these feelings do not persist. The domains in which these incidents also occurred varied, meaning that feeling included at one level does not extend to all levels within the organization. Participants may feel included within their team while continuing to feel excluded in the organization more broadly or vice versa. The experience of inclusion across these levels is a tension that is navigated constantly by the individual (Buengeler et al., 2018).

The temporary and bounded nature of these inclusion experiences make them challenging to influence. However, several participants in this study commented on the power of reflecting on these moments, which is encouraging. For example, when asked when the feeling of inclusion occurs and if it lasts, Participant 16 responded this way:

> It is definitely upon receiving it, hearing it. I don’t reflect on it until someone like you comes and asks about it. But even though we don’t consciously keep something in our fore, it’s there. And it operates and moves with us. I consciously feel valued and heard and seen when I hear it or if it comes to the forefront, but I think subconsciously, it’s there. And it makes every day a little bit easier. And whenever you reach tough days, you’re like, “Okay, I know I’m doing the job because something happened or something that somebody says, I think it’s in the moment for the most part, but it’s always there.

The act of remembering and sharing these experiences caused participants to relive them in a way that generated positive emotions. This suggests that while these may be thought of as
transitory experiences, you may be able to renew or extend their impact by reconnecting to them.

**Summary of Findings**

This study aimed to uncover the experiences, interactions, and moments that cause professional staff in higher education to experience a feeling of inclusion in the workplace. The use of constructivist critical incident technique allowed the experiences of professional staff to be centered and enabled them to define what constitutes an inclusion incident. The incidents they shared reveal the range of experiences, often brief and momentary, that resulted in a feeling of inclusion. The six types of incidents that emerged, namely incidents when the professional staff member’s personal or professional identity was acknowledged, a personal connection was established with others, their professional growth was encouraged, or they led a strategic initiative or their values were affirmed, give greater insight into the variety of ways inclusion is generated for professional staff members within the context of interpersonal and organizational interactions in the workplace. This supports the research suggesting that inclusion occurs at many organizational levels (Booysen, 2014; Ferdman, 2014). Identifying two main pathways to inclusion also provides insight into the question of who is responsible for creating inclusion within organizations. Everyone within an organization can make the people around them feel a sense of inclusion. That includes professional staff who have the agency to help others around them feel included and initiate experiences that influence their sense of inclusion. This supports the findings that inclusion is a relational practice, and that inclusion is also a collectively created experience (Smith, 2020).

This study also sheds light on the contextual factors that create opportunities for inclusion incidents and the outcomes that emerge from these incidents. Boundary moments (LeBaron et
al., 2009), especially being new in a role or taking on a leadership position, emerged as essential in creating inclusion for professional staff. Professional staff shared feeling seen, connected, valued, respected, and acknowledged because of these experiences. The detailed descriptions of the emotions that resulted from these experiences support and extend the current conceptualizations of workgroup inclusion (Jansen et al., 2014; Shore et al., 2011) to include not only experiences of belongingness and uniqueness but also a greater understanding of the role of authenticity in generating feelings of inclusion. Lastly, the positive organizational scholarship lens used in this study allowed the generative moments of inclusion experienced by professional staff to shed light on how this critical group of employees develops and sustains connections to the universities they work in and to inclusive leadership practices within these organizations.

**Contribution of This Study and Recommendations**

The key findings in this study reveal implications and recommendations for organizational practice and theoretical research. Professional staff clearly have more influence than they may realize on the experience of workplace inclusion. Findings suggest professional staff would benefit from taking up agency to create a more inclusive environment for themselves and those around them. The discovery of two pathways to experiences of inclusion, the affirmation and impact pathways, provides a guide not only to organizations but to professional staff about creating moments of inclusion within the workplace that move beyond affirmation and into opportunities for impact. For researchers, the emergence of authenticity as a more frequent outcome of inclusion experiences than uniqueness invites additional attention to this construct and the role of state authenticity in creating feelings of inclusion within organizations. Additionally, the use of critical incident technique and a positive organizational approach to
study professional staff experiences of inclusion demonstrates the effectiveness of these methodologies in higher education.

**Practice Implications and Recommendations for Professional Staff**

Analysis of the findings in this study reveals a variety of implications for practice, theory, and research. The implications and recommendations are presented first for individuals within organizations, namely the professional staff, who were the focus of this research. Then a discussion of the implications and recommendation for leaders within organizations and researchers interested in workplace inclusion and higher education follows.

**Individual Level Implications and Recommendations**

**The Importance of Professional Staff Agency.** Professional staff have a tremendous amount of influence and agency in creating inclusion within the workplace. Co-workers were the most frequent participants in the incidents shared in this study. The interpersonal interactions that occur between peers and colleagues in an organizational setting are clearly critical. The high-quality connections that develop through these interactions are important outcomes of the experiences described by professional staff. However, the focus of efforts to create inclusive climates and cultures in organizations is primarily described as the organization’s or leader’s responsibility. The connection between the actions of employees and the creation of inclusion for employees is rarely made or discussed. This is a missed opportunity. Interactions with colleagues and peers are more frequent than with organizational leaders, so experiences that are initiated by professional staff can occur more frequently and help to provide a more sustained feeling of inclusion.

In addition to creating inclusion for others, professional staff can initiate experiences that provide a sense of inclusion. While the responsibility for including resides with others, the
initiation of experiences that provide a sense of inclusion can be done by anyone, including the professional staff member themselves. This is not meant to suggest that it is up to the professional staff member to make themselves feel included. Instead, this recommendation suggests that professional staff members are not powerless when it comes to generating a feeling of inclusion. Instead, professional staff can engage in positively deviant behavior that aligns with their values, and that action can open the door to deeper levels of inclusion. While utilizing this agency is not without risk, the rewards for the individual and often the organization can be powerful. Professional staff who want to feel a greater sense of inclusion should look for initiatives and projects that align with their values and use these experiences to understand the degree to which they are included in their workplace.

Professional staff would benefit from a deeper understanding of the power and agency they must create inclusive environments, especially if they are experiencing organizational climates or cultures that are not inclusive. The signals about whether someone belongs and feels they can be their authentic self are as impactful regardless of whom they come from within the organization. Professional staff should feel empowered to provide these cues in the interactions they have with others. No matter what level within the organization a professional staff member is they can create a feeling of inclusion for others which will impact the climate and culture more broadly.

**The Importance of Inclusive Leadership and Climate for Inclusion.** Leaders can help to create the conditions that allow this positively deviant behavior from employees. Organizational cultures that are less rigid and encourage more collective ways of being can make it easier for employees to take steps that challenge the norm. Leaders who discover the things that hold meaning for their employees and find ways to connect them to opportunities that allow
them to take action on those things can help to encourage positive deviance. Further research into how positively deviant behavior impacts an individual’s perceived sense of inclusion in the organization may help uncover more pathways to inclusion and foster positive organizational practices.

**Utilize Reflection as a Tool to Sustain Feelings of Inclusion.** The experiences of inclusion offered by professional staff were described as transient. In the moment, inclusion is experienced, but that feeling does not persist. Participants did suggest, however, that rather than disappearing, the feeling may lie dormant. This allows staff members to access these emotions to renew a feeling of connection to others and the organization. Professional staff can develop a practice to regularly reflect on moments when they felt included in the workplace to access these dormant emotions.

It was extremely difficult for participants to think of moments when they felt included. It is much easier to recall moments of exclusion than inclusion, so participants were given a reflection exercise to complete before the interview. Participant 19 described her first impressions of this study and how they shifted as she completed the reflection exercise. She said:

> I immediately went to, when don’t you feel included? Right? And then as I read it, I was like, this is completely opposite. She wants the plus, when do you feel included? But my first go-to was thinking when I was not included. So, it just caught me off guard. And I’m better because of it. Because then you put on a whole new lens.

Professional staff in this study remarked on the power of this experience to remind them of these critical moments of inclusion. Still, they do not need to wait for a researcher to come along to think about these times. Inclusion incidents are not routine, so developing a regular practice of reflection on these more generative moments can increase the frequency of the feeling without necessitating the creation of an actual moment of inclusion.
Encourage Micro-Affirmations

Organizational leaders are encouraged to avoid excluding others rather than to enable inclusion (Shore & Chung, 2023). One popular topic in diversity training across higher education is how to avoid microaggressions, described as unintentional comments or behaviors that degrade or insult people of color (Sue et al., 2007). While we should all strive to avoid these behaviors, this is only one way to create more inclusive climates. A more positive approach would be to encourage the use of micro-affirmations (Rowe, 2008). The term was first described by Rowe (2008) as “apparently small acts, which are often ephemeral and hard-to-see, events that are public and private, often unconscious but very effective, which occur wherever people wish to help others to succeed” (p. 46). Most of the incidents described in this study can be thought of as micro-affirmations. These experiences send direct or indirect signals that the professional staff member is valued, and their work is appreciated.

Four categories of micro-affirmations have been described in research done with students in higher education settings. The categories are defined as “actions, verbal remarks, or environmental cues” that let students know their presence or identity is acknowledged and centered (micro recognition); their thoughts and beliefs are seen as having value (micro validation); their identity is incorporated in the policies and practices of the organization (micro transformation); and they are shielded from harm or supported (micro protection; Rolón-Dow & Davison, 2021). Examples of these categories emerged in this study. For example, Participant 19, who identifies as a Black female with hearing loss, offered several incidents during her interview illustrating the different types of micro-affirmations. Her experience at an affinity group meeting with the university president created a micro recognition, allowing her to feel her perspectives as
a person of color were centered in the university. The policies adopted by her university to use closed captioning during all Zoom meetings was a micro transformation, signaling that the university was integrating her way of experiencing the world into daily operations without having to ask for special consideration. And her experiences with a White staff member in a similar position within the organization were micro-validations, helping her to find a supportive ally. These experiences affirmed that her salient social identities were welcome and valued in the organization.

Organizations would benefit from a supplemental approach to their current efforts to prevent exclusion. In addition to raising awareness of behaviors like microaggressions and providing training to avoid them, organizations should also raise awareness of microaffirmations and their benefits. Rather than instructing people simply on what to avoid in interactions with others, particularly those in minoritized groups, this approach would instead provide individuals examples of what they can do to promote inclusion. This approach also invites everyone into the practice and benefits because anyone can share and receive a microaffirmation. Regularly recognizing and incentivizing these kinds of interactions across all social identity groups can act to enhance workplace inclusion for everyone.

**Empower Authentic Engagement**

Given the discussion about authenticity in the findings, it may be tempting to suggest that organizations and leaders encourage professional staff to bring their whole selves to work. The idea that anyone is ever their whole self or that being one’s whole self is possible in a work context is too simplistic. Hewlin (2016) described the challenge of this approach this way, “Such exhortations can potentially convey a narrow underlying message that one must display his or her ‘whole self’ at all times, and anything less than that would be considered inauthentic”
(p. 55). It also has the potential to reinforce existing normative group standards by forcing individuals in minoritized groups to feel additional pressure to conform. Instead, organizations can work to increase the cognitive, interpersonal, and motivational fluency that individuals feel within the organization, which leads to a greater sense of state authenticity (Schmader & Sedikides, 2018).

The feelings of state authenticity experienced by professional staff came through authentic engagement at work, the alignment of workplace behavior with an individual’s core values (Hewlin, 2016). Encouraging authentic engagement, rather than simply imploring professional staff to be their whole selves, may provide a more specific and practical goal for organizations to influence feelings of inclusion for professional staff. The descriptions of feelings of authenticity that emerged in the impact pathway closely align with this idea of authentic engagement. Helping employees to discover and articulate their core values (Morgan Roberts et al., 2009) and then finding initiatives that align with these values within a work context may help to foster authentic engagement.

There are various professional development opportunities for professional staff, but those workshops and training are rarely tied to engagement at an organizational level. For example, many campuses have adopted the “Clifton Strengths Finder” (Rath & Conchie, 2008, p. 13) as a tool to identify and nurture employee development. The growth plans that emerge from these trainings generally do not include a connection to a strategic initiative or project where individuals can enact their values to impact others or the organization. The focus is generally on how these strengths will benefit the individual employee and their growth. To empower authentic engagement, organizations can connect opportunities for this kind of strategic engagement to these professional development workshops as a way of signaling that the strengths and values
employees identify in these sessions are aligned with the university and its goals. For example, Participant 9 who was new to his organization, asked for permission to start a staff advisory group. What if, instead of initiating the request, he had been identified as a result of his onboarding process as someone who cares about this issue and then encouraged to participate? Providing opportunities for impact can enhance the motivational fluency that leads to a greater sense of state authenticity which has been illustrated in this study to impact workplace inclusion.

Enable Inclusion at the Boundaries

The brief and momentary interactions that are so prominent in this study happen at boundary moments (LeBaron et al., 2009) in the experiences of professional staff. The moments where the professional staff member’s personal or professional identity is being tested. This happens at the beginning of a new job when professional staff interact with their colleagues for the first time. It happens as new task forces and committees are formed, and group norms are created. It occurs when professional staff are navigating new identities in their lives, like caring for an ill family member or being promoted. These boundary moments occur at all levels within the organization. The complexity of higher education environments also impacts the frequency with which these boundary experiences occur. The interconnected nature of different organizational structures brings professional staff into relationships across departments, divisions, structural levels, and stakeholders in what has been described as a multiversity (Kerr, 1963/1982). Each of these new interactions in task forces, community dialogues, transactions, and initiatives are an opportunity to create an inclusion moment. Organizations need to pay particular attention to these boundary moments as the potential for inclusion is present in these spaces.
For example, professional staff shared several examples of invitations to attend events or to interact with others that came in the first few weeks of their employment. This window of time is critical. The creation of inclusive moments could be added as an explicit action item to the onboarding plan for all new professional staff. Rather than leaving these moments up to chance or the goodwill of others. In places where this is already occurring, helping people to understand how these actions create a sense of inclusion may help people to understand why they are important.

Research Recommendations

*Extend Workplace Inclusion Frameworks and Definitions by Adding Authenticity*

The prevailing framework for workplace inclusion is the Shore et al. (2011) model. This framework and the scale developed to support it (Chung et al., 2020) provide an excellent foundational structure for studying the individual experience of inclusion. The findings in this study extend the prevailing model to include measures of authenticity, however, especially as we begin to study inclusion not just as a phenomenon that impacts minoritized individuals in organizations but something that everyone needs to experience. To advance our understanding of inclusion as a phenomenon in organizational life, we need to add concepts like authenticity, which allow for a broader understanding of the lived experience of inclusion. The professional staff in this study did speak to feelings of uniqueness, but these experiences were more pronounced for those with minoritized demographic identities. All participants, irrespective of their demographic identity, spoke to feelings of authenticity. Research into the psychological experience of inclusion would benefit from the incorporation of authenticity as a concept to deepen our understanding of inclusion within the workplace. The emerging stream of research focused on understanding state authenticity may provide an interesting connection to future
inclusion research. For example, while qualitative methods were used in this study, a quantitative study utilizing existing authenticity scales (Jansen et al., 2014; Kernis & Goldman, 2006) to supplement the more commonly used uniqueness and belonging scales may broaden our understanding of the experience of workplace inclusion. Similarly, qualitative studies that explore the experience of cognitive, interpersonal, and motivational fluency described in conceptualizations of state authenticity may provide a deeper understanding of the feelings of authenticity described by professional staff in this study.

**Understanding the Cost of Inclusion**

The frequency with which the inclusion incidents in this study occurred is essential in understanding the experience of inclusion for professional staff. While none of the incidents in this study can be described as routine, the incidents in the affirming pathway appear to be the most common. It is unclear whether they are common because the way participants define inclusion is limited to these experiences or because the impact pathway is not as accessible to professional staff. The interactions in the identity affirmation pathway are easier to achieve because they involve one-time gestures and invitations. They come at little cost to the person, including the individual, and require little effort from the participant. For example, including a new colleague in a social gathering after work or acknowledging a staff member’s hard work is simple to extend and easy for the professional staff member to receive.

On the other hand, incidents in the impact pathway require a level of engagement that is more complex and can require the professional staff member to take some risks. For example, the participants who spoke up at a divisional meeting which allowed another employee to feel they could contribute, were taking a risk. The lack of resistance resulting from these actions taken by participants becomes a powerful cue that the organization values the participant and
respects their agency to act. These incidents happen less frequently because they come from actions on the professional staff member’s part that require sustained effort or asking the professional staff member to step out of their comfort zone. They may also be identified less frequently because these actions are only sometimes encouraged or rewarded.

Future research that examines the nature of the incidents in the impact pathway, including the reasons for, costs of, and benefits of initiating these less-common incidents, could be quite revealing. The current study was exploratory and allowed this dynamic to emerge, but specific attention was not given to the reasons professional staff decided to initiate these actions. The emergence of the impact pathway speaks to the role of agency for professional staff members in creating inclusion. While the group and the organization enabled the conditions that allowed the professional staff member to feel included, the staff member is the one who initiated the experiences that were described in this pathway. A qualitative study that seeks to understand how professional staff take action to align their values with their efforts in the workplace and how that impacts their sense of inclusion in the workplace would be valuable.

**Continue to Explore the Experiences of Professional Staff in Higher Education**

The lack of research focusing on professional staff is a tremendous oversight in the literature. The current study centers the experiences of this overlooked population in a way that is rarely done in higher education. The rich narratives describing the context of these inclusion incidents provide a window not only into the experiences of this population, but also into the nature of the workplace in higher education. The incidents shared in this study did not occur in the classrooms or residence halls. They occurred in administrative offices, around conference room tables, through emails and phone calls, and during off-campus social gatherings. These are
the spaces that are hidden in the literature because they are the domain of this group not of faculty or students. This gap in our understanding needs to be filled.

The extensive research focusing on students and faculty experiences in higher education may provide inspiration for future research focusing on professional staff. For example, the importance of microaffirmations to the creation of supportive and developmental environments for students could help to inform an exploration of the impact of microaffirmations for professional staff. The findings in this study suggest that the experience of microaffirmations may have significance for creating inclusion within organizations. Research that uses a positive organizational approach to understanding how professional staff experience microaffirmations in the workplace, could provide interesting insight and may work to support the current understanding of their experiences for others.

The findings in this study have also been reflective of findings in other areas of inclusive climate or leadership research that have not been explored in a higher education setting. The incidents in this study have helped to illustrate existing theories but have also worked to uncover under-researched topics. Constructivist approaches allow the individual to define the experiences they feel are important in higher education. Given the complexity of higher education environments, it is helpful to have a methodology that provides insight into the incident, context, and outcomes. According to Schwartz and Holloway (2014), “CIT in the educational sector has proven to be highly valuable in the identification of significant factors that contribute to positive or negative human encounters” (p. 5). More qualitative studies that utilize critical incident technique to explore the experiences of professional staff would be extremely helpful to practitioners in human resources and diversity offices as they work to create more inclusive environments for professional staff.
Reflections

I began this study to understand the lived experience of inclusion in the workplace. The literature on inclusion discusses the creation of inclusive environments and cultures but rarely describes what happens when individuals experience a sense of inclusion. In my role as Chief Diversity Officer in a medium-sized university, I was particularly curious about the experience of inclusion for the people around me. While I was able to find research about students and faculty, there was a dearth of research about the experiences of the population I work most closely with, professional staff. I can tell you the percentage of professional staff on my campus who feel the community is inclusive, thanks to our climate studies. I cannot, however, tell you what the experiences, moments, and interactions are that caused them to feel that way. Ultimately this is the gap in understanding that I hoped to fill with this research.

My conversations with professional staff through this research study illuminated the psychological experience of inclusion in a new way. Listening to moments of positive deviance, times when people were made to feel a sense of belonging and uniqueness in at work, was enlightening. I imagined the creation of inclusion to be as complex as the concept. Instead, I discovered that, more often than not, brief one-on-one interactions caused these momentary feelings of inclusion for professional staff. I understood inclusion to be relational in nature, but that theoretical idea is more than a concept for me now. Inclusion as a practice is now wrapped in narratives that contextualize the idea and explain the feelings of belongingness, uniqueness, and authenticity that define it for the professional staff I work with every day.

The Power of Positive Reflection

I made a deliberate choice to take a positive organizational approach to this research. As a diversity practitioner, I spend most of my days at work responding to experiences of inequity
and exclusion. I have a front-row seat to what happens when things go wrong. I wanted to understand instead what happens when things work. I had no idea what this approach would mean for participants. A handful of the participants in this study made references to these conversations feeling like therapy. At first, I laughed off the comments which generally emerged at the end of the interview. However, as I began to hear this more, I understood that they might have some significance. Asking people to reflect on the times when they were included is an act of positive deviance. It involves reflection, which is not common in the workplace, and connects the professional staff member to parts of themselves they do not usually discuss at work. The opportunity to recall and reflect on these positive experiences made the participants feel good. I also realized that these conversations had a positive residual effect on me. The time I spent hearing about the inclusion experiences of these professional staff members reminded me that positive and inclusive experiences are happening. It also reminded me that my goal is to enable inclusion, not simply to prevent exclusion. Keeping that lens at the forefront during the day changed how I practiced. I have started incorporating appreciative inquiry techniques into my work and lean on strengths-based approaches to one-on-one coaching.

**Who Benefits from Inclusion?**

In designing this study, I did not limit the demographic profile of my sample. My philosophy is that organizations are required to create environments where everyone feels included, not to ensure that only those in the minority feel included by those in the majority. So, as I set out to understand how professional staff in organizations like mine experience inclusion, I decided to interview people in minority and majority social identity groups. My job as Chief Diversity Officer is, as I see it, to ensure that the University systems and policies provide equitable outcomes and experiences for everyone. This has sometimes put me at odds with
people who view my role as one that should exclusively advocate and support marginalized groups on campus. But I was surprised when this sentiment was expressed as I shared my plans for this research with others. For example, one of the first questions I received when discussing my proposed research topic was, “Whom are you planning to talk to? Women? People of color?” The assumption was that I would be talking to those in marginalized groups, most likely because that is the group people associate the most with benefitting from inclusive environments. This sentiment was repeated when I shared how my sample was initially shaping up, with more White men than any other demographic group. The most common reaction was, “Really? What can they share about inclusion? Aren’t they always included?” This view ignores individuals’ complex intersecting identities and the universal need we all share to feel a sense of belonging and authenticity.

The reactions I received should not have surprised me, but I was taken aback by them. I did not realize that my approach to this research would cause me to confront my professional and personal sense of self. Inclusion has been an elusive experience for me. As a multiracial, multicultural woman, I have often struggled to feel included. My desire to understand the experience of inclusion across a spectrum of social identities reflects my own complex identity and experience. Selecting one identity group or restricting participation in the study would have reminded me of the ways I am forced to choose or to conform, and I believe that is why I resisted. Instead, I chose to let all voices in, to assume that the complex identities carried by the people who responded to the study would add value, not distort the findings.

The decision to allow all voices did lead to a more nuanced view of the experience of inclusion in the workplace. In addition to adding to the existing understanding of the experiences of those in minoritized groups in the workplace, this study also allowed in the experiences of
those we may not automatically think would benefit from inclusion. For example, the six White men in my sample shared rich examples of times when they felt included in the workplace. They offered inclusion incidents across both pathways, including times when their personal or professional identities were affirmed and times when they enacted their values through strategic initiatives that improved the organization. The one inclusive incident type that the White men in the study did not offer examples for was the social identity affirmed incident type. In these predominantly White, predominantly male environments where their visible identity is not salient, they did not discuss experiences where their social identity was validated. However, this is only one type or way to experience inclusion, and the five other inclusion types provide a more detailed understanding of inclusion in the workplace. If our prevailing view of inclusion is that it is only connected to social identity or that it is only beneficial for those in the minority, then we are preventing ourselves from truly understanding workplace inclusion. We are also limiting our ability to create inclusive environments because we are incorrectly excluding people who also benefit from inclusive moments.

The identity of professional staff is only one of many that I and others hold in the context of their workplace. The lived experiences of inclusion shared here reflect the complexity of identity and demonstrate that everyone experiences inclusion. I hope that future inclusion research takes a more intersectional view to allow the complexity of experiences and perspectives that exist in organizations to be better understood.

**Conclusion**

This research study involved a simple request: “Please describe a moment, experience, or interaction that made you feel included at work.” At least, it appeared to be a simple request. However, most of the participants in this study shared how challenging it was to respond to this
prompt. It is not that these moments of inclusion are not occurring, because, upon reflection, everyone in this study could recall at least one incident. It is more that these incidents are rare and fleeting. While we are beginning to understand the value of inclusive climates, and organizations increasingly aspire to lofty goals like inclusive excellence, higher education has a long way to go. This study was designed to aid this journey by centering the voices of professional staff, who make up almost two-thirds of employees at most colleges and universities and uncovering their unique experiences of inclusion in the workplace. The positive organizational approach used, allowed a focus on the more generative moments of organizational experiences, a less common way of exploring workplace inclusion. The detailed incidents participants shared provide a window into the experiences, interactions, and moments that create a sense of inclusion for this often-overlooked population.

I am immensely grateful to the 23 professional staff members who participated in this study. Their willingness to pause and reflect on these incidents was edifying for me and helped to reveal several insights about the nature of inclusion in the workplace. For example, despite the focus on inclusion as a benefit for those in minoritized groups, the findings in this study demonstrate that anyone could feel included irrespective of their identity or position in the organization. And, although the literature is dominated by discussions about the role of leaders in creating inclusion, anyone could make someone else feel included in the workplace. Additionally, this inquiry provides a window into the moment inclusion is experienced, which helps to move beyond the quantitative measures of the construct popular in the literature. The exploratory qualitative design revealed three main incident categories and two overall pathways common to these experiences. These categories and pathways help to explain how professional staff are made to feel included by others as well as the ways they initiate these experiences for
themselves. Also, workplace inclusion is described as relational and is theorized to occur at all levels in the organization, and this study affirms that assertion. Finally, workplace inclusion is most commonly defined as experiencing a balance between belongingness and uniqueness, but the findings in this study advocate for extending this conceptualization to include experiencing authenticity. These insights help to move the study of inclusion in the workplace forward and provide implications for practitioners as well as researchers.

Quinetta Roberson’s (2018) remarks at the London School of Economics, quoted in Chapter I, bear repeating: “When organizations talk about inclusion, they talk about practices and policies. When people talk about inclusion, they talk about their experiences” (23:01). The experiences in this study were not destined to be inclusion incidents. The antecedents described, like lacking confidence, being new in a role or position, dealing with a challenging personal situation, or being ‘the only’ in your department, could have easily led to experiences that created a sense of exclusion. Instead, the professional staff in this study shared moments and interactions when their sense of self was affirmed, or they received a cue that their values were aligned with the organization. While some participants did talk about organizational policies or inclusive leadership practices, more often than not, what they offered was a moment when they were recognized as multidimensional. To be seen and acknowledged not just for your work or identity but as a complex being with the potential to influence the community around you is at the heart of the experiences described in this study.

Inclusive leadership policies and practices, like transparency and access to decision-making, can assist in creating the environment that leads to these experiences. But when people describe the moments when they were made to feel included, they are more likely to talk about their interactions with others that lead to high-quality connections than the policies or
practices of the organization. The feeling of inclusion is created during the moments when professional staff are invited to a social gathering by a co-worker, their team throws them a baby shower, or a faculty member asks for their input on a syllabus. Inclusive leadership, as described in these moments, looks less like the implementation of a policy and more like a note of thanks for a job well done sent by an administrator to someone in another division, or the university president calling to welcome a new employee, or a supervisor encouraging an employee to take on a stretch assignment. These critical moments in relation to others are what professional staff talk about when discussing inclusion in the workplace.

A more generative approach to creating effective workplace culture and climates that aims to enable inclusion, rather than prevent exclusion would benefit organizational practice based on the incidents described here. The outcomes described by participants in this study, including feeling seen, connected, respected, and heard, are the stated goal of many organizations. We want everyone to feel like they belong without sacrificing parts of who they are to be effective. The alignment between how someone sees themselves and the cues they receive from those around them about whom they are allowed to be, and the work they are allowed to do is critical to creating inclusive environments. Additionally, a focus on how individuals are allowed to be themselves rather than simply the degree to which they are allowed to feel different would provide a more intersectional approach to workplace inclusion research. By providing more clarity about what is happening at the moment a professional staff member experiences inclusion and the contextual factors surrounding these moments, this study provides a vision of the ways we can act to create inclusion for others and for ourselves.
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Appendix A: Recruitment Email Text

To be shared with contacts to forward within their individual networks.

My name is Katie Lampley and I am a doctoral student in the Leadership and Change program at Antioch University. I invite you to take part in a research study exploring the experiences and interactions that generate feelings of inclusion for professional staff in their workplace.

If you agree to participate you will be asked to participate in a one-on-one interview where you will be asked about events that you experienced in the workplace. To take part in the study, you must be able to answer yes to the following questions.

1. Are you at least 18 years old?
2. Do you currently work at a 4-year college or university in the United States?
3. Do you identify as a professional staff member?
   - Professional staff are identified as employees in administrative areas of the university like enrollment, advancement, marketing and communications, student affairs, administration and finance, and facilities who occupy non-managerial roles like client support specialists, admissions or academic support counselors, student activities or health and wellness roles, office or clerical positions, or maintenance and grounds crews.
4. Have you had an experience or interaction at work that made you feel like you were included in your organization (by your workgroup)?
   - These moments may include an interaction with another member of the community or an experience in the workplace that made you feel like you are part of the organization and that you are able to be yourself.

If you answered yes to all of the questions above and you agree to participate, you will be asked to complete a 30–90 minute zoom interview between xxx. You will also be asked to consent to a recording of the interview to allow the interviewer to focus on the information you are sharing and to ensure accuracy of your statements. You may choose to use a pseudonym and keep your camera off. All information gathered will be kept confidential.

Participation is voluntary, and you may refuse to answer any question or withdraw from the study at any point.

For questions about this interview, or if you are interested in participating, please email me directly at (email). If you have concerns about this study, you may contact, xxx.

Thank you for your consideration of this request.
Katie Lampley
Appendix B: Agreement to Participate in Research

Researcher: Katherine Lampley
Title of Research Study: Experiences of Inclusion Among Professional Staff in Higher Education

Summary
You have been invited to participate in a research study exploring the experiences and interactions that cause professional staff to feel included in their workplace. If you agree to participate you will be asked to participate in a one-on-one interview about events that you experienced in the workplace.

Consent to Participate in Research

What are some general things you should know about this practice interview?
Interviews are designed to obtain new knowledge. This new information may help people in the future. You may not directly benefit from participating in this interview. Indirect benefits will include the promotion of our understanding of the experiences and interactions that cause professional staff in higher education to feel included in their workplace. Also, many people find value in reflecting on workplace experiences.

Who will take part in these interviews?
Participants must be currently employed by a 4-year college or university within the United States and hold professional staff (non-instructional) positions within the organization. Participants should be able to recall and be willing to discuss experiences or interactions that caused them to feel included in their workplace.

What are the possible risks of participating in this interview?
This study will involve minimal risk and discomfort. The probability of harm and discomfort will not be greater than your daily life encounters. Risks may include emotional discomfort from answering interview questions. No service of any kind, to which you are otherwise entitled, will be lost or jeopardized if you choose to “not participate” in this study.

Your consent is being given voluntarily. You may refuse to participate in the entire study or any part of the study. If you choose to participate in the study, you are free to withdraw at any time without any negative effect on your relations with Antioch University or any other participating institutions or agencies.

What will happen if you participate in this interview?
If you agree to participate, you will be asked to complete a 30–90-minute Zoom interview. You will also be asked to consent to a recording of the interview to allow the interviewer to focus on the information you are sharing and to ensure accuracy of your statements. You may choose to use a pseudonym and keep your camera off. The recording will be deleted after the conversation is transcribed. You will be given the opportunity to review all notes and uses of your statements before the study is completed.
To help the researcher accommodate your schedule, please indicate dates and times that would be most convenient for you to take part in this study. After receiving this form, if you choose to participate, the researcher will contact you to confirm your interview at a time that you have indicated. You are able to opt out at any time should your availability change or should you no longer want to participate.

Please share your availability between [INSERT DATES]

______________________________________________________________________________
______________________________________________________________________________

How will my information be protected?
Interview data will be kept on a password-protected cloud database accessible only to the researcher. Your identity will be removed during the transcription process and all analysis will be done using the de-identified transcripts. Files with participant names and contact information, as well as files linking pseudonyms with real names will be destroyed once the interviews are complete. Participants will not be identified in any report or summary of findings drawn from these interviews. We may use de-identified data from this study in future research without consent.

If you would like to conduct the interview with your camera off and or using a pseudonym, you may choose to do so. Regardless, all identifying information will be removed during transcription and recordings will be deleted. Please indicate your preference below:

**Camera:**
- On ☐
- Off ☐

**Pseudonym:** Yes (indicate preferred pseudonym): ☐
- No ☐

What if I have questions about this study?
You have the right to ask, and have answered, any questions you may have about this interview. Questions or concerns about this interview should be directed to the researcher at (email). If you have concerns or complaints about the interview process you may also contact the Institutional Review Board, Antioch University at (insert email).

Can I keep a copy of this form if I sign it?
After you have signed and returned this consent form, you will receive a copy of it for your records, signed and dated by the researcher.

**By signing below, you are indicating that you meet the requirements for and consent to participate in this interview.**

Signature: _______________________________ Date: ____________

Researcher Signature: _______________________________ Date: ____________
Appendix C: Participant Profile Form

Researcher: Katherine Lampley
Title of Research Study: Experiences of Inclusion Among Professional Staff in Higher Education

Please complete the following participant profile questionnaire. These questions will help to confirm eligibility for the study. In addition, the responses will be used during analysis of the study data to identify any patterns related to participant profiles.

1. Are you at least 18 years old? YES _____ NO _____
2. Do you currently work at a 4-year college or university in the United States? YES (Name of Institution: ________________________) NO _____
3. Do you identify as a professional staff member? YES ____ NO _____
   o Professional staff are identified as employees in administrative areas of the university like enrollment, advancement, marketing and communications, student affairs, administration and finance, and facilities who occupy non-managerial roles like client support specialists, admissions or academic support counselors, student activities or health and wellness roles, office or clerical positions, or maintenance and grounds crews.
4. What is your current job title? _____________________
5. Does your work primarily support students, faculty, staff, or some other population? Students ___ Faculty ___ Staff ___ Other ___
6. Do you interact primarily with external or internal audiences? External ___ Internal___
7. Have you had an experience or interaction at work that made you feel like you were included in your organization (by your workgroup)? YES ___ NO___
   o These moments may include an interaction with another member of the community or an experience in the workplace that made you feel like you are part of the organization and that you are able to be yourself.
8. How would you describe your gender? Female _ _ Male ___ Other ___ Prefer not to answer ___
9. Which category includes your age? 18–29 ___ 30–39 ___ 40–49 ___ 50–59 ___ 60 or older ___
10. How would you describe your race or ethnicity? American Indian or Alaskan Native ___ Asian ___ Black or African American ___ Hispanic, Latino, or Spanish origin ___ Middle Eastern or North African ___ Native Hawaiian or other Pacific Islander ___ White ___ Multiracial ___ (please specify: ________) Some other race or ethnicity ___ (please specify: ____)


Appendix D: Participant Pre-work

(Shared prior to the interview)

Thank you for agreeing to participate in this research study. Attached is the signed agreement form for your records. I look forward to speaking with you on XXX. The zoom information is listed below.

In preparation for our conversation, I encourage you to spend some time reflecting on the interactions and experiences you have had at your current workplace that caused you to feel included. During our conversation I will ask you to share up to four of these experiences with me. Below you will find a form to help guide your reflection. Feel free to make notes and write down any thoughts on this form. You will not be asked to share this document, but you may find it helpful to refer to these notes when we meet.

Please let me know if you have any questions. I look forward to our conversations.

All the best,
Katie Lampley

Reflection Exercise:

Think about times when you felt included at work. These moments may include an interaction with another member of the community or an experience in the workplace that made you feel like you are part of the organization and that you are able to be yourself. Consider the following questions as you remember each of these experiences or interactions.

- What happened? Was someone else involved?
- What made that moment one that made you feel a sense of inclusion?
- What led to that moment?
- What was the impact of that moment on your experience in the workplace?
- What impact, if any, did your social identity have on how you experienced this moment?
Appendix E: Interview Protocol

Interview Protocol

Thank you for your participation in this research study. My name is Katie Lampley and I am a graduate student at Antioch University Graduate School of Leadership and Change. This interview helps to shape my dissertation research in partial fulfillment of the requirements for a PhD in Leadership and Change. This interview will take anywhere between 30–90 minutes.

I would like your permission to record this interview so I may accurately document the information you share. If at any time during the interview you wish to discontinue the use of the recorder on the interview itself, please feel free to let me know. All of your responses are confidential. Your responses will remain confidential and will be used to develop a better understanding of the experiences and interactions you have had that made you feel included in your workplace.

At this time, I would like to remind you of your written consent to participate in this interview. I am the researcher and interviewer. You and I have both signed and dated each copy, certifying that we agree to continue this interview. You will receive one electronic copy and I will keep an electronic record.

Your participation in this interview is completely voluntary. If at any time you need to stop or take a break let me know. You may also withdraw your participation at any time without consequence. Do you have any questions or concerns before we begin? Then with your permission we will begin the interview.

I first want to understand your role at your current institution. Can you share your job title and describe your general responsibilities? Would you describe your role as primarily student facing or externally facing?

Please describe a moment, experience, or interaction you have had that made you feel included at your workplace.

• What made that moment one that made you feel a sense of inclusion?
• What led to this moment?
• What feelings did you experience during the moment?
• What was the impact of that moment on your experience of the workplace?
• (If the experience is more of an example of exclusion, then ask) If you could change something about that moment what would it be?
• What impact, if any, did your social identity have on how you experienced this moment?

Is there another moment, experience, or interaction you have had that made you feel included in the workplace?

• Repeat follow-up questions above.
When thinking back on the moments we have discussed is there anything you would have changed?

Before we wrap up this interview, is there anything else you would like to share?

Thank you for your participation. I greatly appreciate your participation and everything you have shared with me today.

If a participant wishes to discontinue the interview, possibly ask, “Is there anything I should know about why you are discontinuing this interview?”
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- **Instructor Name**: Lize Bicossen
- **Institution Name**: Antioch University
- **Expected Presentation Date**: 2023-02-28

**ADDITIONAL DETAILS**

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- **Life of current edition**: 1
- **Up to**: No
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- **Volume of Serial or Monograph**: N/A
- **Page/Range of Portion**: 17
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- **Author of Portion(s)**: Ferdsman, Bernardo M. Deane, Barbara
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