

Balancing DEI Initiatives and ERG Expectations in Organizations

A Study of Self-managed Teams and Self-determined Learning Environments

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Global movements shaping the future of workplaces and workforces are Holacracy, Lean, Teal, Semco, Sociocracy etc. Common organizational themes are people-centricity, self-managed teams, and democratization of organizations deeply impacting organization culture. Technology has disrupted job roles, HR systems, and how people learn, engage, communicate and contribute. UN Sustainable Development Goals (SDGs) define a unifying thread for countries and organizations who wish to work smarter, leaner, ensure work parity, equal opportunity, and inclusiveness to unlock Human potential to the fullest. Workforces today consist of millennials and upcoming generations who are very vocal about Diversity, Equity, and Inclusion (DEI) within and outside organizations. Work practices including co-creation, collaboration, communities of practice have resulted in demonstrable change through adaptation of self-management and adoption of self-determined (heutagogical) learning environments. This paper explores how DEI policies and strategies coupled with ERGs (Employee Resource Groups) can be engaged and channelized towards strategies to dynamically to change and bridge the learning and knowledge gaps, increase skill diversity, resilience, and thereby improve competitive advantage.

Keywords: DEI, ERG, self-managed teams, Heutagogy, people centricity, human potential

INTRODUCTION

Democratizing the Workplace through Self-Managed Teams

Global movements around the 'Future of work' have taken center stage over the past decade and affect workplaces, workforces, cultures, and behaviors – examples are Holacracy, Lean, Agile, Semco, Re: work, Teal and Responsive Org. Democratization, equity, inclusion, people-centric management, collaboration, self-management, self-determined learning, creativity, transparency, and social and peer learning connect these movements to the concepts of Diversity, Equity, and Inclusion.

DEI and ESG Defined

Diversity, Equity, and Inclusion (DEI) refers to a set of values that may be practiced by an individual, a group of people, organization or an institution. DEI practices refer to behaviors that are demonstrated to

support people of different races, social structures, ethnicities, religions, abilities, disabilities, identities, genders, sexual orientations, etc. to enable fair treatment of under-represented employees/groups. Employee Resource Groups (ERG) are communities of employees that could be formal or informal; online or offline and represent common or shared interests, identities, practices, and activities.

SDG the Macro Perspective of DEI

While most ERGs are formed and driven as self-managed teams, sometimes these groups could also be driven by legal requirements, compliance needs, and specific social/societal commitments. Examples of ERGs are employee associations, volunteer groups, CSR teams, LGBTQ+ groups etc. Beyond an organization, larger macro initiatives are visible as well at the community, society, and country levels. Together 2030 Global Advocacy Working Group (2019) paper submitted to UN explains the implementation aspects and connects to areas like inclusive quality education, gender equality, reduced inequalities, and promoting lifelong learning opportunities to keep the workforce competitive and current.

Balancing DEI and ERG aspirations

DEI and ERG initiatives are always a double-edged sword though as they can alter value systems, influence individual and group behaviors, influence existing organizational cultures, and give credence and importance to socio-cultural aspects that occasionally may be contrarian. The other key aspect to consider is the change in perspectives as such activities can induce change in the group behaviors which can come from the new experience and foster lifelong learning (social and peer learning).

Challenges

DEI and ERG initiatives have their own sets of challenges which could be a Lack of support and resources, limited participation and fellowship, resistance to change, measurement gaps, intrinsic and extrinsic biases, etc. However, given the wide range of DEI and ERG led initiatives, the benefits probably far outweigh the challenges.

BACKGROUND AND RATIONALE OF STUDY

Why DEI and ESG are relevant?

Employees are key stakeholders in any organization and represent a microcosm of the society in which the organization operates. Employees come from diverse cultural, ethnic, and demographic backgrounds. Organizations have their own constantly evolving cultures and sub-cultures depending on their hiring pattern, job roles, gender, ethnicity, education, geo presence and socioeconomic factors.

Emotional and Social needs

Since employees spend a significant amount of time at the workplace, they have an intrinsic need to interact socially mainly for motivational and emotional reasons. Typically, employees like to be part of informal and formal groups where they have some affinity and relevance and find it easy to interact and communicate. DEI and ESG initiatives are useful channels to maintain socio-cultural equilibrium.

Research Direction and Boundary

DEI and ERG are very broad concepts – yet fit in very well with the Employee Engagement and Performance narrative. However, it is important to focus on a few strategic directions in this context that can give tangible and significant outcomes. Self-managed teams and Self-determined learning (aka Heutagogy) are well researched and actionable practices to study and integrate with DEI and ERG mechanisms.

Organizational Biases

Every organization is subject to biases which could be systemic, work-specific, cultural, or socioeconomic based on the value systems and behaviors in the organization that are visible and subtle.

ERGs can have both positive or negative connotations depending on why they are formed – e.g., employee unions came out of necessity to protect the rights of workers but were viewed with suspicion and cynicism by management if the union was part of a larger country-wide narrative or political group as it brought in an external threat perspective.

ERG Anchors

Initiatives such as Corporate Social Responsibility (CSR) programs often require employee volunteer groups which is another example of ERG in the modern context and is driven by a combination of the laws (CSR-related) and the organizational need to act through its volunteer groups around the selected CSR themes. There are also many social/societal needs around which employees form their own groups. Often it is the charisma and situational leadership of the group’s leaders that draw others to be part of the group and contribute to its purpose.

Why Is This Study Relevant?

This study takes broader macro concepts like DEI, ERG, and SDG and brings them together into an operational actionable framework that focuses on two significant activity levers i.e., Self-Management and Self-Determined learning (Heutagogy) that represent clear tangible areas for action for organizational stakeholders with clear metrics on the outcomes in both areas. Additional benefits of this study include a roadmap towards an organizational maturity model that combines these concepts into a broader ‘Sustainable Human Development framework’ (Source: Authors).

Conceptual Framework for This Study

This study is designed around the following theoretical underpinnings for better understanding – it considers select humanistic, behavioral and learning theories to identify key variables that can define DEI and ERG aspects from a policy and implementation perspective. Self-management and Self-determined learning are significant areas for HR intervention, Employee engagement and measurement of Human Potential using DEI and ERG initiatives as strategic levers. Regulations, policies, and standards are adopted from existing DEI and SDG regulations.

TABLE 1
THEORETICAL UNDERPINNINGS

Theoretical Foundation →	Regulations, Policies, Standards →	Research Focus (Impact areas for HR)
- Human Motivation - Social Learning - Social Identity and Intergroup Behaviour - Social Equilibrium and social change	- DEI - ERG - SDG	- Self-managed teams - Self-determined learning (Heutagogy)

Significance of the Selected Impact Areas

Both Self-managed teams and Self-determined learning are relatively modern practices and concepts that have been extensively field tested by researchers and industry practitioners and have clear adoption models. DEI and ERG can be considered as creativity and learning based change interventions that can anchor and allow organizations to design broader and bigger social experiments and experiences to empower their workforce to think, learn and solve organizational problems on their own and feel a sense of pride and achievement.

RESEARCH QUESTIONS AND METHODOLOGY

Research Questions

Some of the key questions that are relevant to consider in this study are as follows:

- How do DEI and ERG initiatives influence organizational culture? If so, what could be the key areas of impact?
- Do DEI and ERG initiatives encourage self-managed teams? What are the challenges and opportunities?
- Are DEI and ERG initiatives suitable to enable self-determined (Heutagogical) learning through intergroup interaction and experience?
- How can such practices of self-managed teams and self-determined learning benefit employee engagement and build situational leadership capabilities?

Methodology

The study considers review of literature to validate and suggest a practical action framework for Sustainable Human Potential practices and defines a charter for organizations to consider. The study provides recommendations on key constructs, variables and directions for future research including qualitative (narrative research) and empirical studies.

LITERATURE REVIEW

DEI and ERG provide opportunities for Human Development both within an organization and how an organization interacts with its environment which includes civil society at large, other organizational groups, special interest groups, communities of practice, affinity groups, etc.

Theoretical Underpinnings

Maslow (1943) brought forth the idea of various cultural paths to goals (physiological, safety, love, esteem, and belongingness) are more important than conscious, specific cultural goals. From a DEI perspective, such needs do come in the primary hierarchy of an individual especially from wanting to ‘belong’ to affinity groups which gives people a sense of social relevance, a common community feeling, being respected amongst peers by being a part of relevant ERGs.

Maslow (1943) explained esteem may be classified into two sets – desire for strength, achievement, independence, and freedom (all DEI parameters) and reputation or prestige which includes recognition, importance, appreciation etc. which comes only when one is part of an ERG and is actively contributing. The author also stated that cognitive capacities especially perceptual, intellectual, and learning are ‘adjustive tools’ and are active only when the above existential ‘dangers’ do not exist.

Bandura (1971), an avid researcher of human behaviour, in his work “Social Learning Theory” emphasized the importance of man as one with independent thinking abilities and a sense of self-direction - this is very interesting when we look at the outcome of an ERG activity as learning and acting in consonance with others in the ‘safe harbour’ of a group helps individuals build their confidence and overcome their fears quickly and be accountable.

Bandura (1971) further states that individuals can learn through direct experience, modelling (copying others’ behaviours) and observational learning. From a DEI and ERG context, peer and social learning are a mandatory process as the group leadership is situational and often informal, yet the knowledge, skills and capabilities required are very precise if an individual is to add value to the ERG.

Tajfel (1974) in his paper “Social Identity and Intergroup Behavior” focussed specifically on Intergroup behaviour to explain the role and scope of ‘social psychological processes in causal relations’ which interfere with any sort of group behavior. He reasoned that group behaviours would differ for ingroups (within an organization) and outgroups (mixed groups).

From a DEI and ERG perspective, this theory explains group dynamics in more specific terms including behaviours related to individual alignment and continuity with an ERG. The group social dynamics are key pivots to how groups behave.

Levin (1947) in his paper “Frontiers in Group Dynamics - Concept, Method and Reality in Social Science; Social Equilibria and Social Change” applied cultural anthropology to explain groups experiments and interactions. The author reasoned that aspects like volition, emotion and sentiments were found to be intangible by researchers which was not appropriate.

Levin (1947) was able to demonstrate how to use analytical tools and mathematical models to prove various aspects of the theory and thereby demonstrate through a series of social experiments how social equilibrium was maintained and how social change could be brought about. The paper also captures several dimensions of group dynamics which can be used to construct models and experiments with groups.

TABLE 2
Mapping key theories to support DEI, ERG and SDG actions and measures

Pillars/Themes	DEI	ERG	SDG
Human Motivation theories	• Use constructs and variables to frame policies, process and working models. • Design social experiments that are meaningful and relevant to current organizational values, narratives, and direction.	• Use the themes and dimensions to design group structures, work procedures, roles and responsibilities and detail the social experiments into specific group activity charters.	• Anchor macro goals that align with legal, compliance and social requirements and measure them suitably.
Social Learning			
Social Identity			
Intergroup Behavior theories			
Social Equilibrium			
Social Change			

Other Literature

Shared below are specific to DEI and ERG capture additional research perspectives to strengthen and validate other dimensions for policy, practice, and applications.

Gerard & Miller (1967) in their work on “Group Dynamics” share an interesting insight on the segregation of social psychology into three broad areas – group dynamics, mass communication and attitude and opinion change. In the context of ERG, T-group training is useful as an experiential learning intervention to facilitate open boundary conversations and bring out the creativity and thinking of participants. Gerard & Miller (1967) also stated that Problem-Solving behaviour parameters which are useful when we examine the live situation of a Self-managed group of Self-determined learners in the context of DEI and ESG which sets up conditional boundaries even before the group settles in.

Homans (1958) used an interplay of behavioural psychology, economics, dynamics of influence and structure of small groups to understand organizational behavior and the underlying basic processes occurring between individuals and groups.

Tan (2019) in her supplementary article has defined key principles of Inclusion, Diversity, Access, and Equity which she refers to as IDA&E principles which are useful for Diversity and Inclusion training. Inclusion, Diversity, Access, and Equity are areas for policy setting, structures, training and setting up relevant social experiments using fairness and justice as the benchmark values.

Roberson (2019) in her paper on “Diversity in the workplace” refers to the term Diversity as the difference between people at work and points out that heterogeneity in workforces is a given. She differentiates between surface level diversity (each person is physically different) to deep-level diversity measured on the basis of skill and task. She also captured Outcomes and Practices for Diversity.

Ferguson & Porter (2013) have shown preference for ingroup vs. outgroup members which reflects specific individual measures of bias such as trust, prosocial helping, resource allocation and performance evaluation. Moderators such as Conflict explain the relationship between Diversity and Group Performance as conflicts can be derived from both work and non-work issues.

Harrison & Klein (2007) offer a different classification of the distribution of differences or the following diversity types – (a) separation diversity (differences in values, beliefs, and attitudes); (b) variety diversity (differences in knowledge, networks, and experiences); (c) disparity (differences in ownership of privileges, status, positions and pay).

Chao & Moon (2005) examined social and cultural identities either separately or considering a blended model that included demographic, geographic and associative features of culture. A good practical example to consider in our study is to look at how traditionally multinationals had setup localized teams in countries with expat leaders and how today jobs are globalized rather than regionalized with significant leaps in diversity and leverage of global talent.

Turner (1985,1987) authored “The Self Categorization theory” which proposes that as social categories become salient, there is a significant shift in the individual’s cognitive structures as they depersonalize their identities (examples are uniforms worn at work to bring in a sense of work parity). Such practices motivate people to increase their trust levels – this theory connects with the Social Identity and Intergroup Behavior theory (Tajfel, 1974) as cognitive and motivational processes seem to have common parameters for intergroup relationships.

Van Knippenberg et al. (2004) shared the Categorization-Elaboration model which considers that intergroup biases rooted in social categorization may disrupt the informational exchange process that are key to realizing the value in diversity. The author concludes that effective facilitation and group level processing of information and exchange of perspectives and cognitive resources within the group are key to improve the decision quality, innovation capability and other such positive effects of diversity on groups.

Williams & O’Riley (1998) shared the information processing perspective on Diversity which states that heterogeneity leads to better quality of solutions. The authors reviewed more than 80 demographic studies of organizations primarily around work teams and concluded that diversity performance relationships can be explained by indirect effects of group process variables such as communication and conflict.

Nair & Vohra (2015) in their working paper on Diversity and Inclusion at the Workplace, focus more on Inclusion. The authors state that Inclusion being a recent phenomenon is limited to recruitment, selection, training, and socialization activities at the workplace. The authors identify three positive perspectives in Diversity which are (a) Discrimination and Fairness; (b) Access and Legitimacy; and (c) Learning and Integration. The authors also point out negative aspects of Diversity such as strengthening stereotypes about minority groups, lower commitment, harassment, and inhibited decision making as well as attrition.

Igboanugo et al., (2022) used the Diversio Diversity and Inclusion Survey (DDIS), which is an instrument built on five core themes namely inclusive culture, fair management, access to networks, flexible working conditions and safe working environments. As per the author, this scale has been used across industries, and its psychometric properties have been examined based on a cross-sectional survey of 8,800 working adults and the scale has good internal consistency and validity to measure DEI efforts.

Leone (2020) in her paper on Diversity and Inclusion in the Workplace dwells on a business case for DEI initiatives which include (a) Leadership Commitment and sponsorship; (b) Tying the effort to business, social and financial goals; (c) Focus on Performance through using DEI as an Employee Engagement initiative; (d) Clear policies, practices, and procedures.

Cox & Blake (1991) proposed a working model on spheres of activity in managing Cultural Diversity which correlates well with two aspects – with DEI initiatives (Heterogeneity, Higher career involvement for women, Diversity mindsets, Culture, Bias free HR etc.) which provides good direction and mapping towards Competitive Advantage (Cost, Resource acquisition, Marketing, Creativity, Problem-Solving, System Flexibility) with clearly demonstrated arguments and examples.

Manz & Sims (1980) in their paper referred to the term “Substitutes for Leadership” which is very apt for DEI and ERG initiatives which are primarily driven by situational leaders. They drew inspiration from

the Social learning theory (Bandura, 1974) to extend the concept of Self-management. The authors emphasize the importance of target behaviour, environmental cues and personal goals and standards. DEI and ERG initiatives are optimal to consider for implementation Self-management practices and enable teams to become Self-determined learners.

Hase & Kenyon (2000) coined the term “Heutagogy” which means “Self-determined Learning” builds on the humanistic theory and approaches to learning. In the context of DEI and ERG initiatives, groups of people become ‘heutagogical learners’ or self-determined learners as they are driven by their experience and interactions to pick up new knowledge as they resolve real life problems and live through the learning process and experience. Such learners focus on both problem and solutions spaces through Double Loop learning.

Weikzorek-Szymanska (2017) has compiled and presented an interesting set of historical perspectives on DEI adoption in organizations, approaches, and maturity models.

Summary of Literature Review

From the above Literature Review, we can summarize as follows –

Emerging Themes / Activity Tracks

Behaviours and Interactions. We can broadly consolidate four themes for building a ‘Sustainable Human Development’ framework – Human Motivation, Social Learning, Social Identity & intergroup behaviour and Social equilibrium & Social change the foundational pillars. These provide us with several constructs and variables as shown in the proposed framework below.

Engagement. Since people engagement can be within and outside the organization, enabling themes are the key to creating ‘social experiments’ that can be expanded into initiatives. These provide us with direction towards a ‘mechanism of action’ to bring the framework into specific initiatives and include Self-Management, Self-determined learning (Heutagogy), Psychometrics and Competitive Advantage which provide us with the context for engagement.

Primary Anchors. For the framework to emerge, we can consider three primary anchors to group and define the organizational narrative – the outermost would be Sustainability to pick SDG themes 4 and 8 i.e. Work and Education; the bridging middle anchor would be Networks & Relationships (Family, Business and Society) all of which are important for organizations and people to exist in the broader social fabric; and the inner anchor would be People with Diversity, Equity, Inclusion and Social Justice being specific pointers. Various organizational narratives can be built using this approach – Globalization, Citizenship, Future of work & living, Self-management and Self-determined learning of which we have considered Self-management and Self-determined learning for this framework.

Touchpoints. For a framework to be actionable, it needs touchpoints and these could be Culture, Change, Policies, Experiments, Evidence and Practices.

CALL TO ACTION - A DEI AND ERG BASED SUSTAINABLE HUMAN DEVELOPMENT FRAMEWORK

Based on the above literature review, the authors of this study propose an Action Framework which puts all the above concepts in a fuller perspective and can be used as a template for adoption by organizations who are seeking a holistic model for Human Development using precepts of DEI, ESG and SDG towards employee engagement through Self-Management and Self-Determined Learning (Heutagogy). This action framework and the summary charter will serve as a basis for further discussion and research in this area.

Recommendation #1 - Working Charter for DEI-ERG-SDG Integration

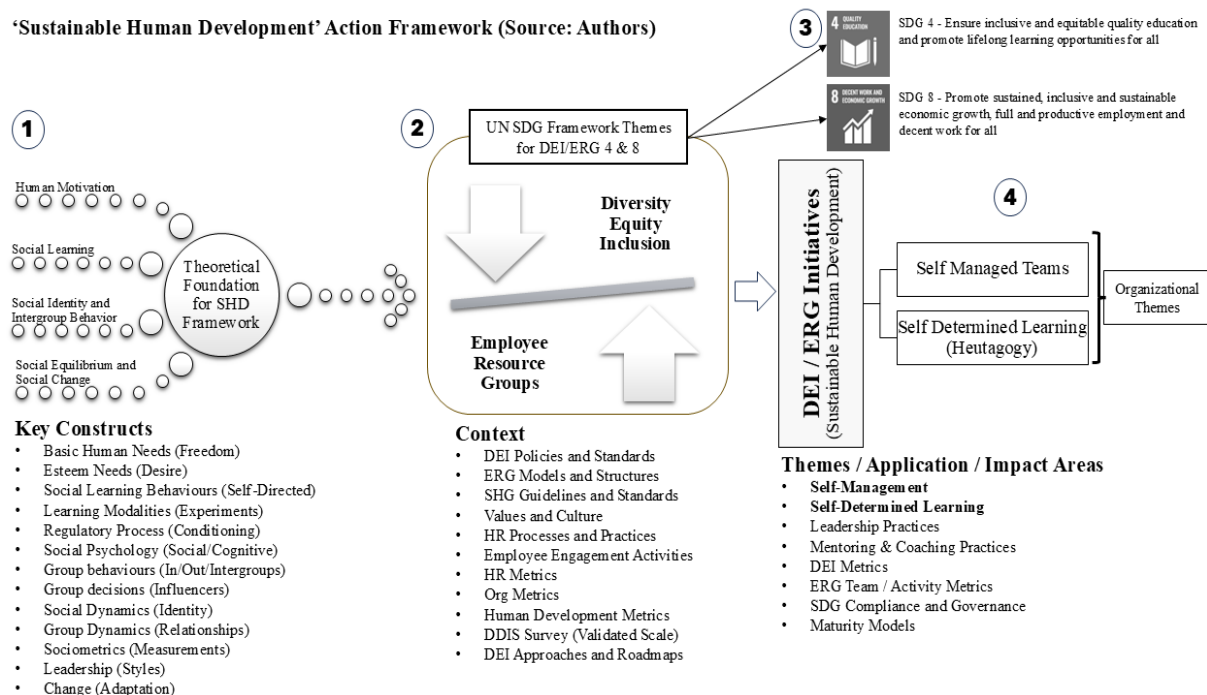
The proposed working charter for DEI-ERG-SDG integration in an organization is

1. A leadership mandate for clear executive level sponsorship.
2. Leadership participation as mentors for these initiatives.

3. Policy clarity on Diversity, Equity, and Inclusion.
4. Policy, Structural and Process clarity on Employee Resource Groups
5. Clarity on Values that are aligned to DEI and ERG activities
6. Communication matrix and Project office to support DEI and ERG activities
7. DEI and ERG related bootcamp and basecamp training
8. Budgets and Resource mentors/Subject matter experts
9. Clear themes aligned to SDG and DEI
10. Employee buy-in and participation

Recommendation #2 – Action Framework for Sustainable Human Development proposed by the authors for organizational adoption is illustrated below.

FIGURE 1
SUSTAINABLE HUMAN DEVELOPMENT ACTION FRAMEWORK



(Source: Authors)

SUMMARY AND WAY FORWARD

Reflecting on our research questions, we can deduce the following -

DEI-ERG And Cultural Influence / Impact Areas

It is evident that DEI-ERG provide strong anchors for Employee Engagement in an informal arena and not always in the work area. Since the social experiments are experiential, they are creative and interesting for employee to consider pursuing along with the freedom of self-management and self-determined learning given proper resources and organizational sponsorship. In virtual and hybrid work environments, these actions make eminent sense to support remote teams and empower them.

Self-Management Opportunities And Challenges

Employees do not like to be micromanaged and supervised. Self-management is a well proven and mature concept and can be easily adopted as a formal model for ERG programs. The opportunities are enormous as employee engagement will yield results in terms of both tangible and intangible benefits coming out of various themes. While the organizational overhead can be a challenge and the teams will need some mentoring, coaching and supervision, the benefits both within and outside the organization and significant.

Self-Determined Learning

DEI and ERG initiatives will push employee teams into unknown and uncharted territories, and they will have to start engaging through intensive problem solving, social learning, peer learning, micro-learning, research, and experiential learning to solve problems, acquire knowledge, learn new skills, and unlearn-learn on a regular basis. So, yes, lifelong learning and knowledge are key outcomes from DEI and ERG activities.

This will need a value network to support autonomous learning from various stakeholders within and outside who can support learning and knowledge creation in a cost effective and sustainable manner. Communities of Practice are a well proven and good place to start.

Employee Engagement and Situational Leadership

DEI and ERG initiatives will provide several creative opportunities for teams to step up into situational leadership roles and use mentoring and coaching as growth levers to learn leadership skills which can help them in their careers as well as culturally help understand group dynamics and diversity through active practice and experience.

Future Direction

DEI and ERG initiatives are lived experiences and are better understood by being part of such groups either as participants or as researchers who are allowed to observe through a qualitative narrative research. While the DDIS scale assessment will help establish baselines, the impact can only be understood through compilation of case studies or active participation in such programs. Empirical studies can be considered provided there is clarity on the hypotheses for which the proposed framework needs to be detailed and articulated into constructs and variables based on the objectives selected.

Future Research Scope

There is ample scope for future research which can be aligned to specific industries, sectors, or types of ERG initiatives studies across organizations. Case study build up can be a good starting point to understand current organizational baselines before considering long-term or ongoing research. Sustainability reports of organizations can also be studied to get a perspective on how human potential is captured and reported and what metrics are used.

IMPLICATIONS

Organizations today are undergoing significant transformation in the composition and deployment of workforces that are hybrid, virtual and globally distributed. Traditional employee engagement was designed for conventional work environments where everyone came to work. This is where organizational design needs a shift and given the composition of a virtual or hybrid workforce, not only do work environments have to change such as shrinking infrastructure, but a complete re-look at the organizational social fabric is needed. Society today is questioning the relevance of organizations many of whom are driven with a digital first approach. DEI and ERG initiatives not only bring in macro perspectives and boundaries but also provide a more holistic and inclusive approach to building people centric compact teams that are autonomous in their functional and learning capability and able to deliver value much faster.

LIMITATIONS

There is extensive research that has been done as is evident from the literature review conducted for this paper. Direction setting has been done not only by UN but also by various governments in terms of shaping policies and legislations. Conferences and seminars across the world have socialized these concepts and continue to do so. For a practical feel, social experiments and initiatives are needed as well as empirical studies to test check these concepts in organizations, institutions and society at large as they will demonstrate mechanisms of action and implementation challenges. Leadership dialogues, therefore, need to focus more on Human Capital sustainability through DEI and ESG interventions and share results back through researchers or forums for a reality check.

CONCLUSION

Everyone today is talking about technology, automation and environmental conversation/protection – human beings are a significant part of the ecosystem and human capital sustainability needs to gain mainstream thinking and attention through responsible stakeholder ownership and stewardship at organizational level irrespective of the size and geography of the organization as each human being is valuable. Retrenchment and staff reduction are not plausible answers – they are only short term fixes – beyond the narratives, what is truly required is a more responsible and responsive leadership is treating and respecting human capital at its true value not just a number on the balance sheet.

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APPENDIX

TABLE 1
THEORETICAL UNDERPINNINGS

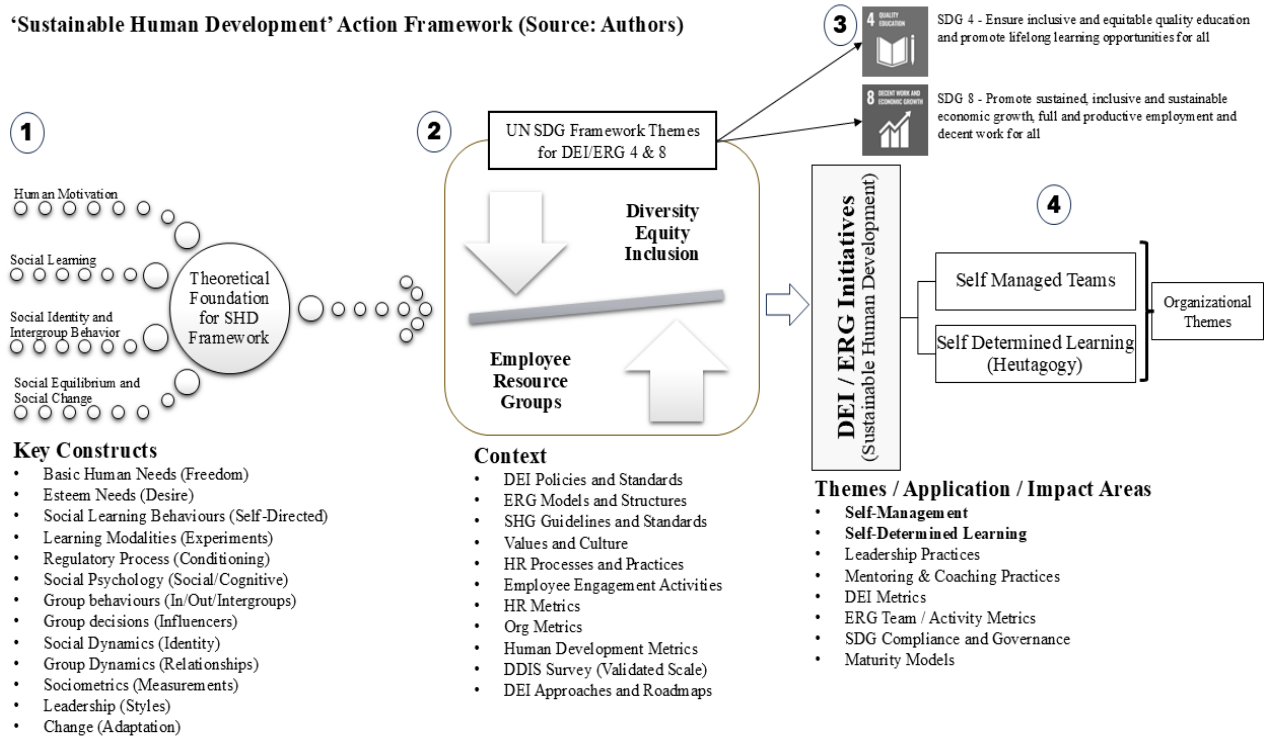
Theoretical Foundation →	Regulations, Policies, Standards →	Research Focus (Impact areas for HR)
- Human Motivation - Social Learning - Social Identity and Intergroup Behaviour - Social Equilibrium and social change	- DEI - ERG - SDG	- Self-managed teams - Self-determined learning (Heutagogy)

TABLE 2
MAPPING KEY THEORIES TO SUPPORT DEI, ERG AND SDG ACTIONS AND MEASURES

Pillars/Themes	DEI	ERG	SDG
Human Motivation theories	• Use constructs and variables to frame policies, process and working models. • Design social experiments that are meaningful and relevant to current organizational values, narratives, and direction.	• Use the themes and dimensions to design group structures, work procedures, roles and responsibilities and detail the social experiments into specific group activity charters.	• Align macro goals that align with legal, compliance and social requirements and measure them suitably.

FIGURE 1
SUSTAINABLE HUMAN DEVELOPMENT ACTION FRAMEWORK

'Sustainable Human Development' Action Framework (Source: Authors)



(Source: Authors)