



Deliverable 2c: iLEAD Themes & Coaching Components



Fostering Gender Equity at Work: Leveraging Leadership, Inclusion, and Self-Care Coaching

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EXECUTIVE SUMMARY

In this report, we provide the background and data from the Phase 2 focus groups and interviews (FGIs) of subject matter experts on inclusive leadership. The FGIs were based on the questions we submitted as Deliverable 2b.

Methods & Participants

- We recruited men and women from a variety of occupations and industries and backgrounds to participate in either a focus group (of 2-5 people) or individual interviews (FGIs).
- We conducted Zoom-based interviews and focus groups with these subject matter experts to identify behaviours and organizational practices and policies that either helped or hindered developing inclusion and self-care.
- We then asked some of the participants to extract key themes, behaviours, and best practices from the data they had discussed.
- We continued collecting data through focus groups and interviews until we reached saturation in the comments and themes identified by participants. That is, we finished data collection at the point at which no new themes or comments/issues/etc. were identified.
- The research team analyzed data and created themes.
- We organized and integrated the data into six main areas, highlighting the key behaviours to support inclusive workplaces as well as the challenges, process, group, and organizational factors that influence effective inclusive leadership and inclusive workplace culture:

Overall Themes
1. Inclusive Leadership Behaviours
2. Coaching & Training
3. Organizational Culture & Context
4. Coworker & Group Behaviours
5. Challenges for Women & Inclusion
6. Self-Care, Balance, & Wellbeing

Within these 6 overall themes, we identified key sub-themes:

1. Inclusive Leadership Behaviours Sub-Themes
a. (Re)defining Good Leadership
b. Modeling- Leading by Example
c. Taking action (self)
d. Communication
e. Confidence, Courage, & Perseverance
f. Supportive, Empowering, & Accommodating Behaviours
2. Coaching & Training Sub-Themes
a. Awareness & Education: The “WHAT” of Training
b. Skill Development: The “HOW” of Training
c. Target of Training
d. Training Best Practices

3. Organizational Culture & Context Sub-Themes
a. Culture & Culture Change
b. Direct vs. Systemic Discrimination
c. Organizational Support & Fairness
d. Inclusive Representation
4. Coworker & Group Behaviours Sub-Themes
a. Allies & Mentors
5. Challenges for Women & Inclusion Sub-Themes
a. Challenges for Women & Inclusion
6. Self-Care, Balance, & Wellbeing Sub-Themes
a. Organizational Support & Training
b. Modeling & Reinforcing Self-Care & Accountability
c. Work-Nonwork Balance
d. Self-Care Best Practices

Study Limitations

Due to employees on summer holidays and transitioning back to work, the timing of the data collection limited our access to employees. Despite our efforts to ensure a diverse sample, we had fewer minorities and fewer workers from male-dominated organizations and blue-collar occupations than expected. Nonetheless, the information we received was relatively consistent across all participants, lending confidence that we had fully addressed the issues.

Implications and Moving Forward

This study has systematically reviewed and identified key themes in developing and fostering inclusive leadership and organizational culture. Participants also provided many practical best practices based on their experiences and expertise. The themes can help organizations identify areas they need to address, and the best practices can provide examples of initiatives they may implement to help support their inclusive workplace actions. In moving forward, we recognize that change can be challenging on everyone. Thus, we examined self-care of both of leaders and direct reports. The support and resources provided by the overall organization can't be overstated: They are integral to the healthy and effective functioning of the workplace.

Finally, we are integrating the skills, behaviours, training suggestions, and processes identified in this study into the coaching aspects of Phase 3. We are creating a manual of the themes, stories, examples, etc. to share with participants. Because of the leader- and group-centric nature of the proposed coaching, we will tailor the content and process to meet individual needs. We will then further analyze the efficacy of the components, in terms of perceived utility, satisfaction, and individual leadership and wellbeing outcomes.

PROJECT BACKGROUND

The focus groups and interviews are part of Phase 2 of a larger project for Women and Gender Equality Canada, Government of Canada. This report was developed based on the Phase 1 Literature Review, using the questions developed in the first part of Phase 2.

The goal of this phase of the project was to conduct qualitative focus groups and interviews (FGIs) of leaders and direct reports in various organizations and develop themes about inclusive leadership, culture, and wellbeing based on data from these FGIs.

The goal of the focus groups and interviews was to examine the issues of inclusive culture in more depth, allowing discussion and in-depth responses by subject matter experts (SMEs) — both in terms of their academic knowledge and experience in organizational contexts.

This report addresses four of the Gender Equity areas in terms of:

1. Leadership and involvement of women in leadership roles
2. Education and skills development
3. Health and well-being of women
4. Examining interventions to promote gender equity in senior management and board of director positions

This report on the focus group and interview findings addresses these four areas by:

1. Asking workplace SMEs to report on workplace behaviours and practices from leaders, themselves, and colleagues that directly and indirectly promote gender equity and inclusion and support women in leadership roles.
2. Asking SMEs to comment on their experiences with interventions/protocols aimed at the individual and team levels that are designed to reduce discrimination and other barriers that limit effective involvement and development of female leaders.
3. Asking SMEs for examples and best practices (of either themselves or others) for how to protect female leader's health in current workplaces.

We conducted a multi-faceted examination of the barriers and resources related to gender in leadership roles to foster equality and inclusion for women in these roles and the promotion of self-care in these roles.

Definitions:

- **Ally:** an individual who proactively supports you and advocates for you.
- **Culture:** the essence of an organization ranging from visible, tangible artifacts to underlying values, beliefs, and assumptions about people and things.
- **Diversity:** the differences that people have – based on demographics (e.g., sex, race, etc.) or based on deeper level values and beliefs.

- **Inclusion:** a feeling one can bring their full self to work and contribute fully and are respected and feel safe.
- **Equity:** treating all employees fairly and providing supports to them, regardless of individual characteristics, to ensure that workers have equal access to work resources and opportunities to succeed and grow.
- **Mentor:** an experienced & trusted advisor who provides guidance, motivation, emotional support, and role modeling.
- **Self-Care:** the actions taken to improve and sustain one's own psychological and physical health, particularly during times of stress.
- **Sponsor:** someone in a position of influence or authority to advocate for you and provide career opportunities for you.

Note that some of the differences in defining roles of individuals (i.e., sponsor, ally, mentor) may solely be a matter of semantics and may not reflect real behavioural differences. Therefore, we accepted all terms and labels and encouraged people to describe the behaviours (instead of just the term) to ensure that we focused on what people did rather than simply on the labels.

FOCUS GROUP & INTERVIEW METHODOLOGY

FOCUS GROUPS & INTERVIEW QUESTIONS & PROCEDURES

Based on the literature review (see Phase 1), we identified key terms and general topic areas. Given this information and the intent of the project (i.e., to inform training/coaching at Phase 3), the focus groups and interviews concentrated on four key areas in Phase 2:

1. Leader/Manager Behaviours– Handling equity/diversity/inclusion
2. Supportive Behaviours of Group Members (Allies – Mentors – Sponsors)
3. Organizational Policies & Practices
4. Wellbeing & Self-Care

To gather data through FGIs in Phase 2 of the research project, we conducted multiple steps in recruitment and data collection and analysis:

1. We worked with partner organizations to recruit participants from a variety of workplaces and occupations.
2. We sent out notes on social media to seek out leaders and direct reports from different industries and geographical locations across Canada. People who were interested in participating sent an email to the project coordinator, who arranged a suitable time for the interview or focus group. These individuals were then sent an email with information on the session, a link to the online anonymous consent form and demographic questions, and a link to the Zoom session.
3. We developed a SME Focus Group and Interview guide (Deliverable 2a).
4. We received Ethics approval to conduct the focus groups and interviews (Deliverable 2b).
5. We obtained informed consent from all participants.
6. We conducted Zoom-based interviews and focus groups with these subject matter experts to identify behaviours and organizational practices and policies that either helped or hindered developing inclusion and self-care. We then asked some of the participants to extract key themes, behaviours, and best practices from the data they had discussed.
7. We continued collecting data through focus groups and interviews until we reached saturation in the comments and themes identified by participants. That is, we finished data collection at the point at which no new themes or comments/issues/etc. were identified.
8. The research team analyzed data and created themes. Please refer to Table 1 for more details on the analytic process.

Participants were then asked to reflect on the information from the session and to provide any final take-home messages, including general themes, trends, suggestions for training/coaching, and suggestions for organizations.

There were 2-3 facilitators for every session (either two junior researchers, or two junior and one senior, or one junior and one senior researcher), with one person being the main facilitator, and the other team member(s) taking notes and noting any follow-up questions. Therefore, there were 2-3 separate sets of data from each focus group and interview. These notes were written up and proofed for clarity, comprehension, breadth of information, and accuracy. The two junior researchers also extracted themes from their notes, and they created an overall list of themes and quotes that reflected each theme and subtheme (based on their own notes). Two of the project senior researchers then reviewed all notes and independently created themes based on the data. These two senior researchers then reviewed all of these independent files, and identified commonalities and exclusions to create a short list of themes (both a macro and micro list). They then met and reconciled any discrepancies in their themes and ratings.

Table 1: Thematic Analysis Steps

Step	Task	Participants & Team Members
1. Recruitment	Ensured a broad recruitment and selection of male and female leaders and direct reports from a variety of industries across Canada	All team members
2. Focus Groups & Interviews	Conducted FGIs, and recorded in writing all data from these sessions	2 Junior researchers + 1 Senior researcher
3. Saturation Check	Brief review of content and tentative themes to check amount of reliability across sessions and reviewers, and to assess whether any ‘new’ information was being collected in later sessions	2 Junior researchers + 1 Senior researcher
4. Theming (within session)	Identified key themes across individual sessions	Participants (with help of facilitators)
5. Theming (initial)	Identified key themes across all data and linked to participant data	2 Junior Researchers & 2 Senior Researchers (independently)
6. Theming (Integration)	Reviewed all four independent theming documents, identified 6 key themes across these documents, integrating researcher notes and themes (see Table 2)	Senior Researchers (independently)
7. Theming Confirmation	Reviewed the 6 themes and sub-themes; confirmed the interpretations and data for each theme; provided examples for each theme and subtheme	2 Junior Researchers & 2 Senior Researchers (independently)
8. Final Theming Steps	Confirmed the themes, and reviewed for clarity, comprehension, and construct coverage	All team members (independently & jointly)

NOTE: Please refer Phase 2: Focus Group & Interview Guideline document for more information on the specific questions and prompts used in the FGIs.

LEADER & EMPLOYEE PARTICIPANTS

Participants consisted of 32* Canadian leaders and employees (19 women; 13 men; 20 of whom chose to report their demographics**). The ages of participants ranged from 33 years old to 66 years old, with a mean age of 45 years old. In terms of ethnicity, 65% of participants identified as Caucasian or European descent, 20% identified as Canadian, 5% identified as Black/African, 10% did not respond.

Occupations

Participants were employed in a variety of occupations with a variety of job titles, including: CEO, VP - Client Experience, Senior Manager - Colleague Engagement & Insights, Organizational Effectiveness & Decision Support Specialist, Assistant Deputy Minister, Director of Finance, Director - Centre for Entrepreneurship, Organizational Psychology Consultant, Game Director and Game Presentation Manager, Coach/Consultant, RN/Educator/Project Coordinator/Project Consultant, Manager of Psychometrics, Relationship Manager, Executive Director, Manager Learning & Organizational Development, Senior Manager, Chief People Officer, Charity Leader, Lead - Partnership Development, Librarian.

They had worked in their jobs for a mean of 7.3 years (SD=3.97), ranging from 15 months to 15 years.

Leadership:

- 50% had a female direct supervisor or manager, 39% had a male supervisor, and 11% did not have a direct supervisor.
- 75% of participants had direct reports: The number of direct reports ranged from 1 to 38 with a mean of 5 direct reports.

Training

- 80% of participants reported having received training in equity, inclusion, and diversity.
- Additionally, 75% of participants received general equity, inclusion, and diversity training (e.g., what it is; why it is important)
- 65% had received general leadership training (e.g., what it is; why it is important; skills development)
- 30% had received inclusive leadership training (e.g., how to foster and lead inclusive workplaces)
- 35% had received mentorship/ally/sponsorship training to develop female leaders (e.g., specific behaviour/skills training)
- 25% received leader self-care training
- 10% reported having received anti-racism training
- 10% received bias/unconscious bias training
- 10% received training on Indigenous practices and spirituality
- 5% received training on leading virtual teams
- 5% received communication training

Most participants reported that all the training they have received was helpful, especially in terms of awareness, empathy, attitudes, and systems of thinking. However, some comments from participants stated that not all training is equally beneficial, with bias training ‘not hitting the mark’ and some inclusive leadership training being too generic and therefore less impactful. Additionally, although participants noted the benefit of training to improve general awareness (‘the what’), it was noted that this training outcome alone did not equip employees with tangible skills to improve equity and inclusion (‘the how’). Leadership training was noted as being beneficial for awareness, but also for equipping participants with tools and confidence.

NOTE:

**We reached saturation of information and themes in the FGIs after the first 20-25 FGIs, such that at that time, additional participants were not developing new themes or subthemes and were confirming the information presented by the previous participants.*

***Only 20 participants chose to report their demographics, so there will be more variability in participant characteristics than is reported here.*

See Deliverable 2C for more information on the specific items developed based on the themes identified here, in which separate subject matter experts helped to link the items with the themes (i.e., subscales).

**FOCUS GROUP & INTERVIEW RESULTS:
INCLUSIVE LEADERSHIP & CULTURE THEMES**

Our focus groups and interviews were centred around the four major questions of inclusive leadership behaviours, supportive group behaviours, organizational support (& practices), and wellbeing and self-care of leaders. We independently reviewed the data and extracted common topics and themes throughout the FGI data (see Table 1).

Based on our independent and collaborative reviews of the FGI data, we created six main themes that represent inclusive leadership and culture.

Overall Themes
1. Inclusive Leadership Behaviours
2. Coaching & Training
3. Organizational Culture & Context
4. Coworker & Group Behaviours
5. Challenges for Women & Inclusion
6. Self-Care, Balance, & Wellbeing

Within these 6 overall themes, there were several key sub-themes that reflected the details of each of the overall themes:

1. Inclusive Leadership Behaviours Sub-Themes
a. (Re)defining Good Leadership
b. Modeling- Leading by Example
c. Taking Action (self)
d. Communication
e. Confidence, Courage, & Perseverance
f. Supportive, Empowering, & Accommodating Behaviours

2. Coaching & Training Sub-Themes
a. Awareness & Education: The “WHAT” of Training
b. Skill Development: The “HOW” of Training
c. Target of Training
d. Training Best Practices

3. Organizational Culture & Context Sub-Themes

- | |
|---------------------------------------|
| a. Culture & Culture Change |
| b. Direct vs. Systemic Discrimination |
| c. Organizational Support & Fairness |
| d. Inclusive Representation |

4. Co-worker & Group Behaviours Sub-Themes

- | |
|---------------------|
| a. Allies & Mentors |
|---------------------|

5. Challenges for Women & Inclusion Sub-Themes

- | |
|-------------------------------------|
| a. Challenges for Women & Inclusion |
|-------------------------------------|

6. Self-Care, Balance, & Wellbeing Sub-Themes
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- | |
|--|
| a. Organizational Support & Training |
| b. Modeling & Reinforcing Self-Care & Accountability |
| c. Work-Nonwork Balance |
| d. Self-Care Best Practices |

Table 2: Thematic Analysis: Overall Themes & Subthemes

OVERALL THEME	SUB-THEME	Individual Reviewer Themes & Examples			
		Reviewer 1	Reviewer 2	Reviewer 3	Reviewer 4
1. INCLUSIVE LEADERSHIP BEHAVIOURS	a. (Re)defining good leadership	· Leader behaviours to support inclusion	· Need for agentic and communal behaviour	· Effective leadership · Inclusive workplace · Person-focused	· Challenging definitions of leadership re: being inclusive
	b. Modeling-Leading by Example	· Modeling & Leading by Example	· Need for role models	· Accountability · <i>Holding one's self accountable</i> · Role model	· Mentoring and Role models (need to pay for development)
	c. Taking Action (self)	· Be vocal about it	· Need for Role Models · Active Leadership	· Accountability · <i>Moving into action</i>	· Need for policies
	d. Communication	· Communication to leaders (training)	· Need to Listen	· Communication skills	· Communicate values and standards
	e. Confidence, Courage, & Perseverance	· Confidence & trust in self and employees	· <i>Being courageous & assertive</i>	· Confidence · Courage & Perseverance & Acceptance of Failure	· Recognize imperfection and need to change
	f. Supportive, Empowering, & Accommodating Behaviours	· Authenticity · Allyship/ · Mentorship/ · Sponsorship · Respect, trust, · Vulnerability · Empathy · Self-insight/ · reflection/ · self-awareness · Confidence · Voice · Passion	· <i>Need to be open, vulnerable, listening</i> · <i>Value of mentors</i> · <i>Seeing is believing</i> · <i>Importance of pulling others up</i> · Active Leadership	· Authentic connections · Cheerleader · Fostering voice/power · Feeling valued & respected · Offer opportunities · Accommodation · Trust, empathy, understanding, & acceptance · Providing flexibility · Ally/ mentor	· Being authentic · Self-awareness · Trustworthy · Voice · Provide challenging opportunities · Inclusive behaviours (listen, respect, fairness, & equity) · Sensitivity to family issues · Attentive to people's struggles

OVERALL THEME	SUB-THEME	Individual Reviewer Themes & Examples			
		Reviewer 1	Reviewer 2	Reviewer 3	Reviewer 4
2. COACHING & TRAINING	a. Awareness & Education The “WHAT” of Training	<ul style="list-style-type: none"> · Awareness & understanding of sponsor behaviours 	<ul style="list-style-type: none"> · Creating Awareness · Need to raise awareness & ally behaviours · Being aware of challenges 	<ul style="list-style-type: none"> · Education/awareness 	<ul style="list-style-type: none"> · Need for Awareness · Self-awareness
	b. Skill Development: The “HOW” of Training	<ul style="list-style-type: none"> · Focus on the “How” 	<ul style="list-style-type: none"> · The ‘how’ matters · Need for coaching 	<ul style="list-style-type: none"> · Practicing & applying skills · Skill development 	<ul style="list-style-type: none"> · Need to know ‘how’ to change/behave/speak/manage/etc. · Need for repetition · Sharing stories & vision
	c. Target of Training	<ul style="list-style-type: none"> · <i>Manage training</i> · <i>Feeling included in training</i> 	<ul style="list-style-type: none"> · Recommendation re: participants – should focus on men; should focus on women; mixed training 	<ul style="list-style-type: none"> · Group training · Train all in organization · Train males 	<ul style="list-style-type: none"> · Inclusive training · <i>Who are you training?</i> · <i>Shouldn’t solely target women to change</i>
	d. Training Best Practices	<ul style="list-style-type: none"> · Allow time for change to happen (won’t be immediate after training) · DEI Training; · Advancement Programs; · Female leader development 	<ul style="list-style-type: none"> · Training recommendations (Broaden training) · EDI coaches (Need for toolkit / Feedback) · Recommendations for training content (Focus on fairness) 	<ul style="list-style-type: none"> · Educate leader & group awareness of EDI · Skill development 	<ul style="list-style-type: none"> · <i>Providing space to learn best practices</i> · Internal or external EDI coach · Need for Inclusive Training · Broaden training & development (i.e., intersectionality) · Providing/paying for development

OVERALL THEME	SUB-THEME	Individual Reviewer Themes & Examples			
		Reviewer 1	Reviewer 2	Reviewer 3	Reviewer 4
3. ORGANIZATIONAL CULTURE & CONTEXT	a. Culture & Culture Change	<ul style="list-style-type: none"> · Training should address how leaders can influence organizational culture · Equity and inclusion as a strength 	<ul style="list-style-type: none"> · Organizational culture – Context Matters 	<ul style="list-style-type: none"> · Leverage change from the pandemic · Real willingness to change · Values 	<ul style="list-style-type: none"> · Culture Matters · Times are changing · Systemic org change matters · Create clear plan · <i>Start initiatives</i> · Openness to change/voice
	b. Direct vs. Systemic Discrimination	<ul style="list-style-type: none"> · Language · Representation · Assumptions · Removing bias · Identifying red flags & bias 	<ul style="list-style-type: none"> · Need to acknowledge stereotypes & bias; selection; reactions to targeted hires · Defining competence · Exclusion (based on assumptions of what others can or can't do) 	<ul style="list-style-type: none"> · Legal responsibilities & equity · Sexism · Inclusion vs. paternalism 	<ul style="list-style-type: none"> · Openness to challenging all assumptions and language & practices
	c. Organizational Support & Fairness	<ul style="list-style-type: none"> · Flexible work hours · Remote work · Policies & encouragement for parental leave · <i>Organizational support of self-care</i> 	<ul style="list-style-type: none"> · Need to take tangible action – Policies must support inclusive HR practices · Eliminate Barriers 	<ul style="list-style-type: none"> · Buy-In from the top · Real willingness to change 	<ul style="list-style-type: none"> · Culture/ Policies · Transparent policies (fair – equitable) · EDI-part of a broader org. fairness initiative · Senior management support · policies to support self-care · Family-Friendly policies – childcare; maternity benefits
	d. Inclusive Representation	<ul style="list-style-type: none"> · Representation 	<ul style="list-style-type: none"> · Need for representation 	<ul style="list-style-type: none"> · <i>Diversity & representation</i> 	<ul style="list-style-type: none"> · Quotas

OVERALL THEME	SUB-THEME	Individual Reviewer Themes & Examples			
		Reviewer 1	Reviewer 2	Reviewer 3	Reviewer 4
4. COWORKER & GROUP BEHAVIOURS	a. Allies & Mentors	<ul style="list-style-type: none"> · Male allyship; Mentorship & Sponsorship 	<ul style="list-style-type: none"> · Need to raise awareness & ally behaviours 	<ul style="list-style-type: none"> · Train males to make room for females · Group support · Develop relationships 	<ul style="list-style-type: none"> · Mentoring/Sponsor · Ally
5. CHALLENGES FOR WOMEN & IN DEVELOPING INCLUSION	a. Challenges for Women & Inclusion	<ul style="list-style-type: none"> · Problems women encounter at work · Language -in policies, training, etc. · Difficult for women to build social capital · <i>Lack of org buy-in</i> · <i>Not willing to change</i> · <i>Doing nothing</i> 	<ul style="list-style-type: none"> · Need to acknowledge stereotypes and bias · Lack of action · Lack of desire to change in some cases (e.g., cultural beliefs) 	<ul style="list-style-type: none"> · Lack of awareness in own behaviour & of discrimination · Sole focus on 'changing' women · Silence 'inner critic' · Courage to stand up · <i>Biases, exclusion, stereotypes</i> 	<ul style="list-style-type: none"> · Unwitting/unthinking behaviours, language, policies create barriers & perpetuate exclusion. Once aware, excuses must be addressed as to why such issues/language/barriers remain

OVERALL THEME	SUB-THEME	Individual Reviewer Themes & Examples			
		Reviewer 1	Reviewer 2	Reviewer 3	Reviewer 4
6. SELF-CARE, BALANCE, & WELLBEING	a. Organizational Support & Training	<ul style="list-style-type: none"> self-care initiatives must not only be available but also supported by the organization so that employees will actually use them 	<ul style="list-style-type: none"> Organizational culture Context matters 	<ul style="list-style-type: none"> Organizational-led initiatives Overall organization must support inclusive initiative 	<ul style="list-style-type: none"> Transparent organizational practices
	b. Modeling & Reinforcing Self-Care & Accountability	<ul style="list-style-type: none"> Leaders leading by example-self-care Accountability <i>Organizational support of self-care</i> Checking in with colleagues to help prioritize wellbeing 	<ul style="list-style-type: none"> Leaders need to model self-care Leaders must walk the talk 	<ul style="list-style-type: none"> <i>Accountability in own self-care</i> Supporting need for wellbeing & self-care <i>'Owning' our own self-care</i> 	<ul style="list-style-type: none"> Need for accountability Accountability (& policies) Modeling
	c. Work-Nonwork Balance	<ul style="list-style-type: none"> <i>Flexible work hours</i> <i>Remote work</i> 	<ul style="list-style-type: none"> Work time/boundary/balance 	<ul style="list-style-type: none"> <i>Balance between work & family</i> 	<ul style="list-style-type: none"> Flexibility Childcare/Family friendly policies
	d. Self-Care Best Practices	<ul style="list-style-type: none"> Change environment/deliverables Address actual stressor 	<ul style="list-style-type: none"> . 	<ul style="list-style-type: none"> <i>Corporate check-ins</i> <i>Self-care & Colleague Support</i> 	<ul style="list-style-type: none"> Develop resilience Establish org. stds Worker check-ins <i>Self-care behaviours (e.g., Sport; EAPs).</i>

NOTE: Regular font indicates a reviewer's theme or subtheme; *Italicized font indicates a lower-order theme or comment that was highlighted by the reviewer and/or through participant quotes.*

**THEME 1:
INCLUSIVE LEADERSHIP BEHAVIOURS**

1. Inclusive Leadership Behaviours Sub-Themes
a. (Re)defining Good Leadership
b. Modeling- Leading by Example
c. Taking action (self)
d. Communication
e. Confidence, Courage, & Perseverance
f. Supportive, Empowering, & Accommodating Behaviours

Not surprisingly, one of the key themes that emerged was around how we define inclusive leadership and workplaces. It was explicitly addressed in several interviews, and it was implicit in discussions around how we identify ‘good’ (and bad) leaders. We address this theme first because it sets the stage for the other subthemes involving the specific sub-themes of inclusive leadership behaviours.

1.a. (Re)defining Good Leadership

In conducting the FGIs, one of the underlying themes was about how we have viewed leadership and inclusion in the past, and how we need to view it in the future. Importantly, several participants talked about how we needed to challenge our notion of ‘good leadership.’ There are several comments about redefining effective leadership. As one participant noted:

“I think there is an opportunity for us to define leadership in a better way, more people-centric... more senior female leaders [have] had to adapt more ‘strong’ or ‘male’ traits to be successful, but ... newer leaders ... seem to be able to be more authentic self as leaders... [We are looking at] how to be more real as leaders—not toxic positivity and stoicism, but also keeping it together.

As an example, transformational leadership is defined as occurring when leaders "broaden and elevate the interests of their employees, when they generate awareness and acceptance of the purposes and mission of the group, and when they stir their employees to look beyond their own self-interest for the good of the group" (Bass, 1990, p. 21). However, Transformational Leadership Theory was developed based on a notion of leadership that may have gender and racial biases. Transformational leadership has been criticized on several counts, including that it is too generic to be useful (Currie & Lockett, 2007), its potential for the abuse of power (Hay, 2006), and its lack of explicit focus on EDI issues (see for example, Cooper et al., 2020).

That is, the issue of EDI is not typically central to existing theories of leadership. For example, to be considered a ‘good (transformational) leader’, one must focus on individual differences; however, inclusion, diversity, and equity, are not typically an explicit focus:

“With individual consideration as “a pivotal construct [in transformational leadership], we can focus our sights on leadership that addresses the differences across individuals, the development of those individuals, and the qualitative transformation that occurs from basing human interactions on self interest to basing them on an interest in others, and ultimately on principles that guide the leader to do what’s best for his/her group. Indeed, it would be difficult, if not impossible, to understand fully the transformation that takes place without understanding the role that individualized consideration plays in development at the individual, group and/or organizational level.” (Avolio & Bass, 1995, p. 201).

Our participants did indeed talk about the need for Individual Consideration, for example:

“We are the same, women and men, it is about who is willing to do the job; it is about respect and listening, it is important to listen, and this impacts people’s life. Sometimes it does not take much to listen, be respectful, be a good leader.”

Participants also identified other leadership characteristics that overlap with transformational leadership behaviours. For example, in terms of Idealized Influence:

“The vulnerability of a leader to admit mistakes and be willing to change (our charter). Being vulnerable to admit that we were off the mark.”

However, they mostly talked about the need for an explicit diversity, equality, and inclusion focus in (transformational) leadership practices and behaviours. For example:

“Use of preferred pronouns, is something we have started, leaders need to be vulnerable that [they] do not know everything with regards to EDI...[our] CEO was a transformative leader, he made everyone feel welcome. I always felt we could speak up.”
 (Individual Consideration with an EDI focus)

“Our CFO is female, for young females to see a female leader rocking the position, it great to see, it’s great to see this change over time.” (Idealized Influence with an EDI focus)

“How do they mentor each other; age diversity is a great example. I ask senior leaders, ‘Wouldn’t it be great to have a young 24-year old tell you how it is?’ Typical response, ‘YES nobody tells me anything’ When it is done well, it works well. There was a young male who was gay, and a senior female (64) leader, she learned as much as the young mentees.” (Intellectual Stimulation with an EDI focus)

“Being put in those prominent roles and being empowered is crucial, letting others see women driving the bus/leading.” (Inspirational Motivation with an EDI focus)

For the purpose of this report, however, we are less focused on the theoretical divide between transformational leadership and inclusive leadership and more on identifying practical ways these leadership behaviours can be integrated. That is, an inclusive workplace must support expanding the definition of leadership to include an EDI focus.

Another of the underlying premises in the FGIs pertaining to inclusive leadership definitions was how ‘inclusion’ and inclusive workplaces were defined and assessed. A few participants noted that although representation was important, true inclusion needs to be defined beyond simple representation, and move beyond focusing on numbers and simple diversity in selection and recruitment to focusing on how people are treated in the workplace.

One participant talked about their organization, saying that:

“...we recruit successfully, but if the environment is not receptive, people will not stay.”

“There were some situations where females said something only for it to be mentioned by males and heard; effectively having to go through a male to get things done. I have some pessimism regarding the ability of training to change the above issues.”

“I would go to the shop floor and there is pornography everywhere, So we were asking people to remove some pornography every day. I would say, ‘If you don’t know how it will make others [women] feel to see that stuff, I will put pornography on my office door and see how it affects how you feel’.”

“We try to help people, we are not working with machines we are working with humans, we have to think ahead and organize so that we can handle issues better. We have a meeting: If we have a person with children, we have a children crisis.”

“Allowing everyone to contribute and being inclusive; For example, getting the pulse of the teams to make sure that everyone is treating people well outside of the senior team. Celebration of various events; even small and impromptu events, employees have a voice and [we/I] want information to flow to the top.”

This theme set the stage for the other subthemes of leadership behaviours. Participants identified these ‘effective’ leadership behaviours, and we clustered them into 5 sub-themes:

1.b. Modeling- Leading by Example
1.c. Taking Action (self)
1.d. Communication
1.e. Confidence, Courage, & Perseverance
1.f. Supportive, Empowering, & Accommodating Behaviours

We developed overviews of each of these leadership behaviours, and provided examples based on participant quotes (see Table 3).

Table 3: Inclusive Leadership Behaviour Themes and Comments

Leadership Behaviour Sub-Themes	Dimensions & Participant Comments <i>(direct quotes are in italics)</i>
	<p>One of the recurrent themes was the importance of leaders modeling the desired behaviours. Tied in with this theme of ‘Leading by Example’ was the idea of being authentic and holding oneself accountable for one’s actions, both of which were mentioned several times.</p>
<p>1.b. Modeling – Leading by Example & Authenticity</p>	<p><i>“I worked with two women who ... have been mentors guides throughout my career. I am in an industry that is male dominated... [These women] taught me that my perspective is important, that you can impact things. Women role models are lacking, [but] when they are available, it is amazing. [It] reminds me that I am bringing a women’s perspective.”</i></p>
	<p>Our leaders <i>“say exactly what they are supposed to say, but at same time reinforcing behaviours that go against this”</i> (for examples, rewarding and praising overworking when also saying to take as much time as need for self-care).</p>
	<p><i>“As leaders, we must hold ourselves accountable.”</i></p>
	<p><i>“Our CFO is female, for young females to see a female leader rocking the position. It is great to see. It’s great to see this change over time.”</i></p>
	<p><i>“Authenticity, the word of the year, how do you create or facilitate an authentic relationship with people?”</i></p>
	<p>A key theme was that effective leadership had to involve taking action to support inclusive workplaces and not be passive.</p>
<p>1.c. Taking Action</p>	<p>In dealing with a case of biased treatment of a female employee, the leader <i>“...shut down the meeting, restructured the process and restarted the investigation with people aware that the process was previously sexist/bias. He was leaning in to support women. Once he was aware of the sexism.... he changed the process.”</i></p>
	<p><i>“My female boss in a male-dominated industry started a Friday women’s group where they discussed how to handle difficult male customers who would try to demand male salesperson”</i></p>
	<p><i>“leaders ... have a role to play—create action plans, connect to DEI initiative...”</i></p>
	<p><i>“They set targets for safety, performance, etc. etc., why don’t we set targets for diversity?” We need to set targets. They would say, ‘But what if we don’t meet them’, I would say, ‘so we keep trying’.”</i></p>
	<p><i>“[We had a] leadership program with only 20% being women, we asked, ‘what is the problem, why is it so low?’ We provided child-care, as soon as this was done, it flipped the women enrolment went to 80% females.”</i></p>

	<p><i>“...ideally there is someone senior and with authority to get things done.”</i></p>
	<p><i>“...It’s easy to put values & mission statements on the wall, but do they get lived”.</i></p>
	<p><i>“Making sure the recruitment process and wording is inclusive... But we all know there are there are no women with 20 years pipe fitting experience, so I would ask, ‘do we need 20 years experience?’ Clearly we do not.”</i></p>
	<p><i>“...Blind screening process, now HR does it and hands the list of candidates to managers. So that if they do not select qualified applicants, there is some accountability.”</i></p>
	<p><i>“Pay transparency. Asking candidates what they want to get paid, is horrible. It amplifies pay differences. You must provide transparency on pay, it can be a range. Pay is typically ‘hush hush’, but it is only so, so that inequities can be sustained.”</i></p>
<p>Developing effective communication (along with the trust, empathy, and understanding/ perspective taking) is an essential component of an inclusive workplace, and it was identified as a key characteristics of inclusive leaders.</p>	
<p>1.d. Effective Communication</p>	<p><i>My leader “encouraged employees to have a voice. [For example], employees were encouraged to suggest things to celebrate and share accomplishments. [My leader] genuinely wanted to know how things were going and how that affected organizational output.”</i></p>
	<p><i>Actively seeking out opinions/ideas: “Listen, check that everyone is having same chance to get what they need and get support they need.”</i></p>
	<p><i>“Be respectful, good listeners, treat others how they want to be treated.”</i></p>
	<p><i>“My new boss [female] speaks to people equally, inclusive, treats others well, by conveying that others’ opinions matter.”</i></p>
	<p><i>“Be respectful, good listeners, treat others how they want to be treated”</i></p>
	<p><i>“Listen, check that everyone is having same chance to get what they need and get support they need”</i></p>
	<p><i>“...the person I was working with gave me a lot of latitude for EDI so we ended up with 50% women...Let’s face it, the conversations change with more women in the room.”</i></p>
	<p><i>“...the person I was working with gave me a lot of latitude for EDI so we ended up with 50% women...Let’s face it, the conversations change with more women in the room.”</i></p>
<p><i>“... showing up as a powerful leader and how to communicate with others. [The company] asked those to be ‘out’ at work, this represented a fair amount of emotional labour. Yet communication is the key.”</i></p>	

	<p><i>“We do not train managers on how to lead a diverse team. I asked that they look at who you recruit, what role that is being filled, not just filling a space, how to give feedback...”</i></p> <p><i>“Coaching leadership styles. Knowing how to listen. With everything that needs to evolve, we need to actively listen, with curiosity and the issue will move forward. A fundamental skill is how to listen to each other and stay open, this would help us understand others.”</i></p>
	<p>Many female leaders talked about their experiences in having to step up, challenge the status quo, persevere, and not be deterred by failure (and sharing these lessons with other women).</p>
<p>1.e. Courage & Perseverance</p>	<p><i>“...having courage and silencing the inner critic”</i></p>
	<p><i>“My experience is when women challenge dominant men in workplace, they have to be really brave. My leader was not as dominant and brought up in my performance review that I was very courageous and brave to bring these issues up.” (J29-11a)</i></p>
	<p><i>“... have to fight for things; but sometimes this does result in a better outcome”</i></p>
	<p><i>The “advice I was given was that the worst that could happen is that they’ll say no, so even if I [was] worried an idea will fail, it is better to put it forth”</i></p>
	<p><i>“...There needs to be training that says you do not have to take on male attributes to be perceived as having power.”</i> <i>“...The senior manager emailed, I was told ‘never apologize for saying what you believe’...”</i></p>
	<p>A key component of inclusive leadership was identified in terms of not only individual consideration of the work community members, but also in actively engaging and empowering individuals, in terms of providing opportunities.</p>
<p>1.f. Supportive, Empowering, & Accommodating Behaviours</p>	<p>Offering opportunities (e.g., <i>“allow others to drive”</i>)</p>
	<p>Encouraging women to apply for opportunities</p>
	<p>When talking about a conference for women in the oil industry: <i>‘[Having] men in the room is about encouraging women in the oil industry.’</i></p>
	<p>Providing flexibility (in working hours/location/etc.) to accommodate individual workers, but also providing autonomy and giving workers the freedom to make decisions.</p>
	<p>It is important to make <i>“time to notice and offer opportunities”</i></p>
	<p><i>“The best leaders I’ve had are the ones who are first to validate your experiences and feelings” (j2911a)</i></p>
	<p><i>“The way the female leader—and I now— address such issues is to say to males: ‘she trained me and she knows what she is doing’. This conveys confidence in the female employ/leader. This is the culture we want created. Essentially, the leader was stating ‘This person is good, you can trust them and their competence’, then the client/employee had confidence.”</i></p>

	<i>“Supporting workers when they aren’t successful: knowing how to let it go and chalk it up to experience...”</i>
	<i>“Being able to talk to your employees and have an intuition as to how they are doing...And asking ‘are you doing ok?’ Very important”</i>
	<i>It is critical to have “...a leader who absolutely loves their work and is enthusiastic about their goals works toward inclusion”</i>
	<i>We need to be “affirming staff constantly for their good work”</i>
	<i>Leaders must be “supporting them...[even] when they aren’t successful”</i>
	<i>We “keep the group connected” through online meetings, informal gatherings, etc.</i>

The Leadership Behaviours theme logically led into the next theme focusing on the ‘what’ and ‘how’ of training/coaching when moving toward an inclusive culture and identifying content for coaching and training. That is, once we had identified ‘effective’ leadership in terms of equity, diversity, and inclusion (EDI), we had to address how to support and develop those behaviours through coaching and training.

THEME 2: COACHING & TRAINING

Many comments from the FGIs pertained to the actual content and process of developing inclusive leaders –as well as inclusive workplaces.

We first note that in discussing this training/coaching theme, there were a few participants who did not like the term ‘training’ because of poor training practices and experiences, and because of the perspective that it only involves short-term, one-way lectures that do not accommodate individual experiences and learning. For example, one participant noted that:

The “notion of training rubs people the wrong way, especially when it is something they should already know—like being inclusive... People like to think that they are good people and inclusive” even if they might not be.

Several people suggested that organizations should focus on learning and coaching, so we’ve integrated their perspective into this report. That is, we are taking the training best practices identified by participants, and we have integrated them with a coaching perspective, while focusing on continuous learning within an organization. Given that others may have the same reaction to this term, and given that our program (in Phase 3) will be more interactive and tailored, with opportunities to practice behaviours, we have opted to use the term ‘coaching’ to reflect the nature of the programs. For the purposes of this report, however, the terms training and coaching will be used interchangeably because many people still referred to the sessions as training.

Within this ‘Coaching and Training’ Theme, there were four areas that were developed from the data pertaining to the ‘what’ of training, the ‘how’ of training, the target of training, and best practices.

2.a. Awareness & Education: The “WHAT” of Training

When asked what training needs to address, one of the male participants said:

“Developing realistic, and increased awareness of the challenges for women’s success. Provide methods for women to analyze their environment. Understanding decision making environments. ... taking on traditionally male roles. Training participants ...to be aware of unconscious bias.”

The Awareness and Education Theme encompasses three facets:

- a. an awareness of specific behaviours (e.g., what makes a good sponsor?; what behaviours do effective leaders need?)
- b. a more general awareness of EDI, biases, and challenges faced by women leaders
- c. self-awareness of the impact of one’s behaviours on others.

a. Being aware of goals and inclusive leadership/culture characteristics.

In line with most models of training, education and awareness of the issues (e.g., what constitutes inclusive leadership; what are the goals of the organization) is a key first step. Participants identified the behaviours for inclusive leadership (reported in Theme 1), which led them to talk about the theme of training or coaching to develop these behaviours in leaders.

Moreover, the first step in coaching is creating an understanding/awareness of these behaviours that either reinforce or undermine inclusion and EDI initiatives before working on developing the behaviours. Instead of repeating the behaviours from Theme 1, we have presented a few of the quotes that demonstrated the theme of ‘awareness’ of these behaviours (see Table 4) and that dealt specifically with training, coaching, and supporting these leadership behaviours and training.

Table 4: Need for Training on Awareness of Inclusive Leadership Behaviours/ Characteristics

Awareness as a Factor of Training/Coaching	Participant Comments <i>(direct quotes are in italics)</i>
	One basic tenet of training that was briefly discussed was the identification of the goal of training and the goals of the organization in moving forward.
<i>Awareness of goal of training & of the organization</i>	<i>The “essential features of [our training program for women]—which was based on focus groups with these women—are [to identify] the learning goals for participants. That is, what do we want to train women leaders?”</i>
	There were many comments either pertaining to the lack of awareness –or need for awareness—of the essential inclusive leadership behaviours as a key point for leadership development
<i>Awareness/ Understanding of inclusive leadership characteristics</i>	<i>“Understanding and self-awareness of the skills needed to be an effective leader – how to behave to be an effective leader”</i> <i>“...understanding of the attributes of successful leadership and able to identify your own”</i> <i>“...understanding the decision-making environments... board, operating structures...”</i>
	Part of this awareness came from one’s own lived experiences as well as the experiences of others.
<i>Awareness through shared experiences</i>	<i>Training should provide “...examples of lived experiences to all genders”</i> <i>“Perhaps pairing women up with men so they see what women are dealing with...”</i> <i>“I feel training programs have a problem around intersectionality, that is where our system/programs fall apart. How do we make it</i>

	<i>inclusive to all those who may feel excluded in the female-only training program?”</i>
	<i>“Difficult to have EDI training without discussing intersectionality. That is a limitation of EDI training [that is focused only on women].”</i>
	<i>“There is a difference in how women act and speak and men act and speak (on the aggregate)...I need to step in and say ‘slow down’ to men, and for women tell them to ‘sell their idea quicker’. The challenge is finding the balance and staying away from confrontation and conflict.”</i>
	<i>“Indigenous communities were valuable because they had people who had credibility...people were forced to mix and communicate about the topic...Small groups allow for great discussions without people talking over each other.”</i>

b. Being aware of challenges:

There was a strong consensus among participants that a basic element of any training is educating the leaders and group members to develop awareness around EDI issues, including the challenges faced by women leaders (and women who are racial minorities or who have a disability face even greater challenges). Part of this awareness/education training involves identifying the value of diversity for the team and organization, and the role of diversity in the organization. That is, on the most fundamental level, there needs to be an understanding of the basic rights, legal issues, and employment law. Several participants gave examples of direct discrimination against women and other protected groups, and some emphasized that training needed to include *“Awareness of perceived and real challenges to success for women”*:

We need to be *“training the organization to see some of the struggles”*

Increasing awareness of EDI issues is vital. However, some participants did not know how to create that initial awareness.

(Female) “Standard sexual harassment behaviour... You need to show [men’s] behaviour back to them and explain why this is inappropriate and what effect it ... [has on others, on the organizational culture]. This training was based on trust, not sure this could be done with ... those resistant to such training. We could not get ... [the male worker who was behaving inappropriately] to understand. They simply laughed and did not take it seriously. Self-awareness is essential to begin training, but not sure how to create self-awareness.”

The idea of ‘protective’ discrimination, or paternalistic behaviours, came up several times, highlighting the discriminatory behaviours that may have been based on a lack of awareness of the situation and their own actions:

“a friend of mine who has the same role as me on a different team was turned down for an opportunity because she was pregnant. It might have been because leader was trying to help her

and thought she wouldn't want to go to the States for undetermined amount of time while pregnant, but the decision was made for her”

“Women and men [in this organization] expected [poor treatment with regards to equity and inclusion], so there was little initiative surrounding this exclusion. There were cultural deep-seated values and beliefs which precipitated how women were treated. Not sure how this could have been changed.”

NOTE: Many of these comments about the ‘awareness of challenges and discrimination issues’ also appear in the organizational context issue in terms of direct and systemic bias and discrimination.

c. Leader self-awareness.

Awareness also encompassed a self-awareness for leaders: Participants argued that until leaders understand their own behaviours and the impact of their behaviours on others, creating inclusive workplaces would be challenging.

Although most of the comments in this theme relate to leaders’ assumptions and self-awareness, there also were a few comments about everyone’s awareness of their own behaviours. That is, we all need to have an awareness of gender differences in leadership and how they interact with leadership (and our perceptions of leaders).

As one male participant noted:

People all have their own *“unconscious bias – [and are] so imbued with their own perspective that they don't see it viewed differently by others.”*

Similarly, several comments were made about this awareness and mindfulness when it comes to supporting an inclusive workplace. For example:

“Accommodating inclusivity when you haven't been used to it must be done consciously... and developmentally...”

That is, we can't assume that people will just understand what to do. We must make inclusion a focus of their work (doing it ‘consciously’) and provide them the tools to be able to do it.

Many noted that training to foster self-awareness and perspective taking are essential to supporting inclusive leadership development.

In developing an inclusive workplace, leaders must be aware of the *“role [that they have] to play—what are their strengths and blind spots?”*

Some participants noted that with this self-awareness comes a need to ‘develop *realistic expectations*’ about their own strengths, weaknesses, and path for development.

This self-awareness may also be in terms of understanding our own experiences and how these experiences may bias our interpretations of others’ behaviours. One female participant who had

been a vice principal during her career told a story about people misinterpreting language and behaviours of a student:

“A [minority] student ... mispronounced something.... and it was taken the wrong way. He was trying to say something nice, but he was misunderstood... he was taken to the principal’s office. But I was there and I knew what he was trying to say. Instead of trying to understand and show empathy, we want to ‘correct’ the behaviour.”

The participant argued that *“we should be helping his friends to support and defend him”*. This example also highlights perspective taking and the need to give others the benefit of the doubt in our interpretations as well as provide the resources to support understanding and not focus on correcting behaviours.

Moreover, some female participants noted they became aware of their own behaviours (e.g., perhaps negatively adapting to a male culture) and wanted to understand specific steps to take to handle inappropriate situations, career pitfalls, and/or how to excel as a female leader.

One male participant connected this awareness to the next step of behaviour change and development, noting that

Leaders must understand “...how to develop personal strategies to change [one’s own] behaviour and gain support from higher organizational levels.”

2.b. Skill Development: The “HOW” of Training

Once we have developed the ‘what’ of training, including the actual behaviours, coaching content, and increasing awareness, there is still a huge gap in identifying the “how”. There were many comments that focused on the importance of skill development and the “how”: That is, how do leaders put this knowledge (the ‘what’) into action in their daily jobs?

The “How” of Training

“People need the ‘how’. People know the ‘what’. The research grows, but how do I prevent or change things in the future.”

“Leaders want more practical tools to actually make changes. For example: how to manage training, make people feel included in training...”

“Our organization has a men’s groups that talks about how to include women. The ‘how’ part is in its infancy, the ‘how’ is something that is missing. There seems to be an assumption that once you have the training [i.e., the ‘what’] that people will immediately be able to apply the language. I don’t think changes can happen in a day. People need help, people of different backgrounds and ages, give them the opportunity to learn.”

There were many comments about how training/coaching should occur, with examples of best practices as well as examples of poor training and coaching experiences. Some of the comments linked the ideas of the “how” part of training and the need to take action. For example:

“[Training] needs to impact leaders so that they clearly indicate that EDI is important and that employees get involved. Creating action plans and commencing initiatives.”

“I would like to see more practical tools to actually make changes and what to do.”

Participants had a lot of experience with different types of training and coaching—some good experiences, as well as some negative experiences. They provided suggestions for planning effective training to improve EDI goals within organizations. Many participants reflected on both good and bad training and coaching experiences, and they identified best practices to help develop and support inclusive leadership and an inclusive culture as well as behaviours and organizational practices that detracted from an inclusive workplace.

A lot of the comments overlapped with the Inclusive Leadership Behaviour Theme. In addition to those subthemes, we highlight other subthemes and comments that specifically addressed training, development, and coaching.

2.c. Target of Training

“One of the challenges with developing women leaders [is that it] often feels like you’re trying to change women without changing the context.”

Interestingly, a consistent theme throughout the focus groups and interviews was that even though we talk about ‘leader training’, we really mean developing the entire organization and all workers. Some participants talked about incorporating group members into the training, and the importance of training everyone in the group or organization was noted several times, highlighting the irony of asking women to change without changing the barriers. For example:

“We used to think that women needed to change, so we would provide behavioural feedback, leadership skills, networking skills, but there were so many barriers to women... [women] did not need to change, we needed to eliminate barriers.”

Training isn’t just *“about the participants, [it’s] about rest of ecosystem.”*

Training and coaching must involve *“having real conversations and bringing in stakeholders from across the organization.”*

The only way to support inclusion is to “train everyone in organization to support inclusion.”

“inclusion is fluid... [it involves] learning... & communal development of knowledge”

“I have been involved in a ‘Women in Leadership’ program in Toronto along with several other women in leadership programs. One of the main take ways, often it seems we are targeting the women to change, but there needs to be a supportive context, such as, policies, practices, etc. The context is important, while also giving women information on being courageous and assertive.”

Despite the many comments around including all stakeholders, there also was some discussion about women-only training vs. blended training. For example,

“Women-only support programs are beneficial... supplemented with blended training—safe spaces for women to learn, also spaces for other groups to get out the uncomfortable ideas and conversations (working groups/break out groups), but everyone should get the same starting place, same language to be part of solution, feel like they own a piece of it, not someone else’s problem—then integrate groups. Takeaway should be value of diversity.”

“Training is important... but who are you training? Women? Or all people in an organization that need to be supported?”

Training needs to involve educating men specifically because *“they need to be part of the solution.”*

This theme of integrating stakeholders and all of the organization also is linked to the next section on “Organizational Context”, sub-theme of ‘Context Matters.’ That is, the culture of the organization is integral to the success of any initiatives, and thus, we must take steps to address organizational context and culture.

2.d. Training & Coaching Best Practices

“It would be powerful to go through a 6-12 month program run by women to have a safe space to learn and grow.”

“I’ve received training through my formal one-on-one mentoring... More effective than maybe other training or education. Presenting problems and getting strategies to help deal with that individual”

Many of the Training & Coaching Best Practices have been touched on in the previous training sections in terms of the target of training and the how and what of training. We wanted to highlight some of the examples, comments, as well as the aspects of training participants thought were most useful (see Table 5).

Table 5. Best Practices in Training and Coaching and Participant Comments

Best Practices	Participant Comments & Suggestions <i>(direct quotes are in italics)</i>
<p style="text-align: center;">Sharing Experiences & Stories</p>	<p><i>“Start with a workshop or conference so that people can come together (even virtually), and ensure to use goal setting to help identify what they wanted to take away from the training/coaching.”</i></p>
	<p><i>“Create or find videos of women telling their stories of their successes and failures as part of training.”</i></p>
	<p>Share the stories, quotes, and examples from the subject matter experts in the focus groups and interviews in the coaching program.</p>
	<p><i>“Get narratives from women – understand their real-life dynamics...[host a] panel of women from different industries to talk about their personal experiences and how they climbed the ranks...[include a] narrative component of women telling their stories... both their success and failures...very powerful.”</i></p>
	<p>One leader stated that <i>“I rarely speak at EDI meetings because I’m not the expert in that area.”</i> Instead, she asks employees from various groups to attend the meeting and share a story with the group to bring light to EDI issues. As the leader, she helps employees to prepare these presentations, but always allows the employees to share their experiences through storytelling, as she sees this as one of the most powerful ways to invoke behaviour change.</p>
<p style="text-align: center;">Focusing on Skill Development</p>	<p>We need to <i>“focus on skill development and behaviour change, and allow participants opportunities to role-play or practice these behaviours in a safe environment with their coach.”</i></p>
	<p>Coaching and training should be about <i>“practice and ability to try out new skills, implement, and report back [to the team].”</i> It is about <i>accountability to apply [new skills] on-the-job job in a real way.”</i> For example, allow trainees to tackle real business problems specific to that group or industry. If it is a <i>“smaller organization/department, integrate the senior leadership team more.</i> For example, <i>“invite senior leaders to [the end of the training] and have participants share their vision with team”</i> to create interactivity and transparency. For larger organizations, have mentorship opportunities.</p>
	<p><i>“Training is important, but biggest risk is doing training with nothing else. Unless you are able to exercise [what you learned] and be supported [in moving forward], training won’t be effective.”</i></p>
	<p>Training must be <i>“engaging...connected to real day-to-day work.”</i></p>
	<p><i>“things are only [trained]... in terms of educating people—the ‘how’ is sometimes missed.”</i></p>
	<p>There is an <i>“assumption that as soon as you are done training, people will take it as gospel and apply it; but that is not always the case—things don’t happen in a day, people need time to adapt language/actions. [We</i></p>

	<p><i>shouldn't]... discipline people while they're learning—don't expect them to be perfect right after training."</i></p> <p><i>"I want more practical tools to actually make changes and what to do... how to manage training, make people feel included in training, how to address situations where observe incident."</i></p>
Timing & On-going Nature of Training	<p><i>"We break training into smaller segments—a few hours a day here and there instead of full days to keep interest"</i></p> <p>Participants emphasized that much training failed because they were a short-term lecture style without giving participants an opportunity to role play new behaviours or practice and get feedback on behaviours.</p> <p><i>Some of the comments reflected the on-going nature of learning and being inclusive. For example, one participant noted that: "...you can't have misalignment in what you say and do. When clients say, 'we are inclusive', I would ask 'when was the last time you looked at your policy, and have you received feedback'..."</i></p>
Mentorship	<p><i>"I would have liked to be set up with a mentor outside of the company, not necessarily formal, but being connected with mentors around career and career aspirations"</i></p> <p><i>"The best training is formal one-on-one mentoring."</i></p>
Inclusion of Men (& all group/ organization members)	<p><i>"One thing they do that's really good—[they have] a men's group to discuss how they can empower women, make them feel more included as male leaders—Just a group of men who got together to do this."</i></p>
Broaden Training (Content – e.g., Justice)	<p><i>Broad training, leadership types, leadership styles, advanced leadership training. We need to get Men comfortable in dealing in a more diverse setting. I have tried to figure out the how, you(I) try and if that doesn't work out you(I) try something else."</i></p> <p><i>"EDI is now becoming a focus of fairness."</i></p> <p><i>In order to help recognize unfair situations or behaviours or language, "I would suggest having [training to]... recognize those red flag situations, where language may be normalized but it needs to be made apparent that this is inappropriate. It is difficult to recognize unfairness..."</i></p> <p><i>"EDI training is particularly effective when it comes from different people at different times..."</i></p>
Miscellaneous	<p>Include key terms up front so <i>"everyone is on the same page."</i> For example, inclusivity is about making <i>"people feel welcome"</i></p>

Finally, some participants shared a certain degree of pessimism about the power of training alone to make and sustain change, and they argued for the importance of culture and systemic (policy) change that, in turn, may change culture. Without specific policies surrounding EDI, accountability measures, leadership to create and maintain these initiatives, and training people in how to behave differently, changes to culture and specifically EDI are likely to fail. One of the

participant's quotes identified not only best practices in training, but also the explicit link between training and organizational context and culture:

“Training....It's not training... it is policies and practices. Training is important to provide the tools, but the ecosystem is important to provide a culture/context for women to practice EDI. For example, having real conversations, bringing in people from around the organization to have these conversations. Also, to provide space for people to practice skills (and make mistakes) in their job, practice what they are being taught.”

**THEME 3:
ORGANIZATIONAL CULTURE & CONTEXT**

“[EDI] needs real buy-in from the top. Real, not superficial. Making sure there is communication with women leaders, provide support, and provide opportunities for them to use these skills.”

Many participants directly or indirectly mentioned the real impact that the environment and organizational culture (both in terms of negative and positive effects) has on the success of inclusive workplace goals. Moreover, they highlighted that the support of top management was integral to its success. That is, context matters.

Comments around organizational culture and context were all interconnected, but they revolved around four main areas:

- a. Culture & Culture Change
- b. Direct vs. Systemic Discrimination
- c. Organizational Support & Fairness
- d. Inclusive Representation

a. Culture & Culture Change

“...to grow the org, you need to adapt to be inclusive on order for the organization to survive. What language is used is important. We need to be open to creativity and inclusiveness.”

The willingness to change (the company, the department, behaviours, and policies) as well as an openness to hear and respond to employees’ (e.g., women’s) voices (their feedback, disagreements, discussions, etc.) were identified as being key to developing an inclusive workplace.

“If you want to change culture, you need to change three things: Values, language, and behaviour. All are required and are interdependent on the other...If you don’t know what your culture is, you may not know how to change it. I began looking on how to assess the culture, every environment is different. What I have to say to a new tech company is different than what I would say to a construction company.”

“At [our organization] we had a very diverse workplace, we celebrated difference. This created a great environment of curiosity.”

“... there needs to be a supportive context, such as, policies, practices, etc. The context is important, while also giving women information on being courageous and assertive.”

Although a few of the female participants felt that the organizational culture (and ‘male’ culture) are changing, others reported feelings of frustration that certain men are ‘willfully or inexplicably unable to be retrained.’

“We take the culture survey through Ops not through HR to evaluate if culture is changing...we do not have to do a new survey, ideally you want it done independently, but you need to measure how comfortable people are and if there are other issues. We have recommended culture surveys and contracted with a company to do a culture survey. And look at their recommendations on actions after receiving the data.”

In addressing how to be a mentor and support women in leadership roles, one participant also noted that the organizational context must be taken into consideration, and we must *“develop a tool to assess environment”* in order to better help support female leaders. Others referred to assessment in terms of organizational change. For example:

“How do you ‘assess a culture’: A culture survey. It important, because we can get boots in the door, but if women want to leave, we are not successful. We can mandate diversity, but you have to support/foster inclusivity.”

b. Direct vs. Systemic Discrimination

“to improve [direct and systemic discrimination] ... we need broader organizational cultural changes rather than leader training”

Some of the comments around organization and culture included the presence of bias and discrimination (both direct and indirect) in the workplace that was visible in discriminatory practices and policies and leader behaviours.

“Even if women gave no indication that they were planning to have children, women of a certain age were excluded from advancement cycles in organization just in case they decided to go on maternity leave.”

“There were biases and policies in place that discouraged women [who] expressed interest in advancing... there could have been a better mentoring program.”

“We had a woman who was a power pole technician and fell off the pole and got injured. The people that came to do the investigation, there was so much bias in the process, inappropriate recommendations, sexist language. I leaned over and said ‘are you seeing this?’ The VP said ‘I was right’ he shut down the meeting, restructured the process and restarted the investigation with people aware that the process was previously sexist/bias. He was leaning in to support women. Once he was aware of the sexism.... he changed the process.”

In dealing with a case of sexual harassment, a participant noted that:

“We could not get ... [the male worker who was behaving inappropriately] to understand. They simply laughed and did not take it seriously.”

However, to reduce these types of discrimination, we need broader organizational cultural changes rather than simply relying on leader training.

c. Organizational Support & Fairness

We must “...make sure everyone has the same chance, everyone is given the same opportunity, removing those things that prevent women from doing well, help with their leadership, if you have a dream to be a leader, you need the support. Women are smart but need the help....”

We address the topic of supportive leadership in Section 1. However, in addition to support from inclusive leaders, there were comments reflecting overall support and fair practices on an organizational level. That is, participants noted a more general, overall support from the organization and its upper leadership toward EDI goals and women in leadership positions. Participants identified that there is a need for explicit policies, behavioural expectations, and metrics around EDI issues (e.g., pay equity/transparency, acceptable behavioural standards) and accountability for a failure to change or attain/maintain these expectations.

Specific topics identified throughout the focus groups and interviews included:

- ensuring accountability
- creating job flexibility
- supporting training and development
- providing mentoring programs
- being respectful of work-family issues (e.g., taking childcare responsibilities into account; revisiting maternity leave and pay)
- improving selection processes and improve transparency (pay, selection, promotion) to reduce bias
- providing people with time to reflect; create a clear EDI plan
- involving senior leaders in EDI

Conversely, there also were several comments that reflected a lack of organizational support and a lack of organizational fairness.

“I had an analytical show I wanted to produce, got turned down, wasn’t sure why... but still thought it was a good idea, so took it to different set of producers. Once it was on network and was being led by a guy, it was very accepted, so I felt a bit slated that it was my idea—not sure if it was because of my gender, but it feels like it might have been”

Finally, one participant noted that it may be challenging to see a lack of fairness, especially if the inappropriate behaviour or language has been normalized in the organizational culture:

“I would suggest having women recognize those red-flag situations, where language may be normalized but it needs to be made apparent that this is inappropriate. It is difficult to recognize unfairness...”

d. Inclusive Representation

“A certain percentage of people must be of a particular gender. Also, there needs to be roles for minorities and [different] gender.”

One final sub-theme that emerged in the Organizational Context Theme was the need to have diversity more visible in organizations, to increase awareness about the value of diversity, and to have actionable plans to support diversity and create fair representation.

“I work in a financial institution, but work in a HR function, so it is heavily weighted to women working environment, specifically a white women majority. I realize it is important when considering intersectionality that all voices are heard, selection, who gets a promotion opportunity, mentoring, ...”

Part of this representation is linked to the sub-theme of discrimination: Fair practices are required to ensure fair representation. For example, one participant noted:

“You need to understand that in healthcare, we serve everyone. Those that we serve need to [be reflected by] who we are. There needs to be race, cultural, gender reflected in our workforce.”

“Formally working in a subsidiary of a larger company, I was at the ground stage/level of recruitment, the person I was working with gave me a lot of latitude for EDI so we ended up with 50% women. He mentioned ‘You/women are so competent, I would take you over any of these men’. I asked ‘If this is the case, why are these men still employed? Do you know how them being here impacts us (getting paid the same)?’ ...Let’s face it, the conversations change with more women in the room, the discussion quality changes, it is noticeably different (from my experience in both). ...Some senior men have openly stated ‘In the cold light of day having women in the room would have changed how we do business, it would have made us better.’ ...Now as a female CEO, it is up to me to create gender equity.”

“One organization had very specific rule about/around [equitable]group committee representation [based on gender] and race.”

THEME 4:
COWORKER & GROUP BEHAVIOURS

“...my counterpart was hiding her pregnancy, so I filled in for her so that she could go to appointments. I did this without compensation. I came in to help when I was not busy, I was able to create content for her. To this day, I believe that management team does not know that I helped... that some of the content was mine.”

We specifically asked participants about how coworkers, colleagues, direct reports, and others in the workplace can help to support women in leadership positions and foster inclusive workplaces. Participants gave several examples around different types of supportive behaviours, including ally behaviours, mentorship, and sponsorship, and talked about group functioning and culture, and relationships.

a. Allies & Mentors

“That is one thing I am most proud of in my career, I was able to support women who were going through similar experiences that I was going through. Men cannot relate to being a single mom, only women can know what it is like to be a single mom. Many times, I would sit down [with a direct report] to talk about a performance issue and never got there because it was a personal issue that was causing the performance issue.”

We must *“train male leaders to make room for females.”*

“More than mentorship, but sponsorship—leaders making an effort to give women a platform”

A male leader who is leaving his position noted that:

“My colleague wants to take over my job, but in her biography, she did not include words around leadership, networking. So I helped her rewrite her biography.”

“Most of us report to men, so it would be great for them to become allies. However, it is important for [women not to have the job of teaching men]... the organization must train me [and] take on the cost and time to teach men.”

Comments and examples addressed the supportive behaviours that colleagues can provide to support female leaders. Some specifically addressed how men in organizations can support women. For example:

Male allyship is important in terms of *“sharing suggestions with women and what men in organizations are doing to have advantages... correcting language of other men”* and *“encouraging women to new leadership positions.”*

In order to support allies, mentors, and sponsors, training needs to provide concrete examples of what women experience for men to see issues and inequities.

There also were suggestions for specific formal mentorship (or sponsorship) initiatives. For example:

- Have a policy in which all leaders have a group of individuals to mentor (for everybody, not just those who are flagged as ‘high potential’ so it is an equal opportunity for everybody, not just based on personal perspectives)
- Need to match people and find good fit, and mentees must trust mentor, have good relationship
- Organizations may need to go outside the organization to find mentors (although an external mentor isn’t helpful for sponsorship because those mentors can’t bring women to the table)
- Leaders need awareness and understanding around what it means to be a good sponsor, bring people to table
- Communicate information on how leaders of leaders can be supportive (see “how” to section on training)

We “created a women’s group where [we] met for informal lunches to act as solidarity for each other and discuss what organizations could do to address the pressures on women.”

We “formed a non-mandatory women’s working group during lunch to talk about our challenges, a support group to try and find solutions and to see if there is anything the company can do. We had a 2hr workshop on ‘silence the inner critic,’ and offered mentoring opportunities. We would discuss why women do not feel entitled to what men feel entitled to, and to talk about allyship.”

“Mentorship program I was involved in was run by somebody I didn’t report to, so they looked at it from a different perspective, not on personality, but mentorship relationship.”

We “should not only draw from mentors when in crisis.” It should be ongoing.

I had a “roadmap to work from so my mentor could focus on my specific areas of development.”

“I worked with two women who were from a theatre background. These two women have been mentors/guides throughout my career. I am in a...male-dominated industry. [The women] taught me that my perspective is important, that you can impact things. Women role models are lacking, [but]when they are available, it is amazing. Reminds me that I am bringing a women’s perspective.”

It also was suggested that support from direct reports and one’s team can be very valuable as well. For example, one female leader spoke of the time she was dealing with major personal and family issues:

“We must acknowledge that these things [crises] happen to people... I look at who supported me: The best ways to support me? ... [my team] really rallied around... they carried on without me because they [knew] what I [had been] doing... You train the people to work without you... we had a good routine and in my absence, they kept the routine going.”

Her anecdote also highlighted the importance of engaging, empowering, and communicating with her team on a daily basis, so they were able to take over and support her during the crises.

THEME 5: CHALLENGES FOR WOMEN & IN DEVELOPING INCLUSION

One of the themes throughout all of the focus groups and interviews were the difficulties, challenges, stereotypes, etc. that women faced in the workplace. Although some of these issues were addressed in other sections (e.g., direct and systemic discrimination), this section offers a consolidation of these issues and highlights the negative counterpart of ‘best practices’ and positive behaviours reported in previous sections.

a. Challenges for Women & Inclusion

One of the challenges noted by a few participants in creating inclusive workplaces was the possibility of excluding others (e.g., minorities) and other important topics beyond those involving women in leadership.

Several participants talked about their concern about limiting training to women’s issues and ignoring issues involving intersectionality. Leadership, triggers, race, coping, should all be included as topics in training. Also, much like the themes above, inclusivity (or more precisely not excluding others from fairness initiatives) is seemingly intertwined with policy initiatives.

Participants noted several challenges that women encounter which may be difficult, but important, to address through training. For example, it was noted that many female leaders take on extra work themselves when employees expressed that their workload was too significant, whereas male leaders might be more likely to offer more passive support without taking on the work themselves. Participants suggested that these behaviours may be due to high conscientiousness among women, so it may be beneficial for training programs to teach women to be supportive without burning themselves out, while maintaining their conscientiousness and dedication to the work.

Another challenge noted by participants was the (often unintentional) exclusionary behaviour that can happen when women are asked to take on additional administrative duties, such as taking notes or planning/running events. Although there may not be a direct intent to discriminate against women, taking on these tasks can cause others in meetings to downplay the woman’s expertise or can even place them physically outside of the group. One participant even described a situation in which a male colleague had never been asked to take minutes before, but the colleague later came out as trans gender and transitioned to a woman. Once she presented as a woman, she was asked to take on these administrative tasks. One way that participants suggested reducing the gendering of these tasks is to rotate the tasks frequently so that all employees take a turn. Additionally, training to expose these gender biases may be beneficial.

Other issues that women described included owning their own successes and not downplaying their accomplishments.

“I quickly learned when I moved to [a bigger city] that humility was my biggest barrier, and that I had to be more confident in way I speak”

**THEME 6:
SELF-CARE, BALANCE, & WELLBEING**

The issue of wellbeing and self-care is integral for leaders and their direct reports. Moreover, when developing leadership and changing organizational culture, it can be stressful for leaders if they don't know how to address different cultures and genders. The key is not only to help leaders to become comfortable so they aren't constantly worried about doing the wrong things (awareness) and providing them with the skills to do the right things (skill development), but also to emphasize the important role of self-care.

Leaders can establish standards around good work, over-work, and self-care, and model self-care behaviour and be willing to be vulnerable/share their own struggles. Leaders need to also support/fund other's self-care. One participant linked self-care with individual-organizational resilience. Several participants offered suggestions (or their practices) for self-care (e.g., The self-care questions may have appeared to be unrelated to the rest of the questions on inclusive leadership, but we included them based on work showing that leaders may suffer high rates of burnout and health consequences (Landstad & Vinberg, 2013), and our recent work looking at the cost of training on individual functioning.

Table 6. Self-Care, Balance, and Wellbeing Themes

Self-Care	Participant comments <i>(direct quotes are in italics)</i>
	One of the consistent themes on self-care and wellbeing was the need for organizational buy-in and support for the concepts of wellness, self-care, and work-life balance, in addition to having practices match their policies ('walk-the-talk').
a. Organizational Support & Training	<i>"We need training on time management and balancing work/life – would like there to be more of a support system rather than just saying "take as much time as you need" since that can't always be done and may be stressful to have no limits"</i>
	<i>It is important to get "the organization to accept the importance of self-care... It starts with the bottom-line: [the organization] needs to see that this improves when employees are well...[we also] need to train them in how to use the data they get from wellness programs...so that they know if employees enjoy it, if wellness improves, and whether to keep it going...and how it benefits the workplace"</i>
	<i>"My direct supervisor is supportive of people taking days off when needed for mental health days and disconnecting, but at same time, deadlines don't change, so sort of mixed messaging."</i>
	The theme of modeling behaviours came out again when discussing self-care. There were many comments about the positive impact of leaders modeling healthy behaviours and behaviours supporting work-nonwork balance (e.g., using vacation time, etc.). Moreover, while acknowledging the big role that the workplace and supervisors have on worker health and

wellbeing, several participants noted that they are ultimately in charge and responsible for their own health and wellbeing and self-care.	
b. Modeling & Reinforcing Self-Care & Accountability	<i>“A lot of [self-care] is role modelling – seeing women take long lunches, picking up kids, taking vacation unapologetically”</i>
	<i>“If I know I’m not good at self-care, {I need to find} a supportive colleague and [keep] each other accountable to make time for self-care.”</i>
	Self-care for leaders isn’t a ‘one-size-fits-all’ situation: <i>“Finding the right coping/stress management techniques for each individual”</i> is key.
Connected with the issue of leaders modeling self-care behaviours was the issue of aiming for a balance between work and nonwork, with an emphasis on how many female leaders may tend to take on extra work, creating stress and work-life conflict.	
c. Work-Nonwork Balance	<i>My “supervisor [female] is very quick to take on extra work themselves when employees say workload is too significant, whereas male leaders would tell employees to go figure it out and come back to them with solution. Female leaders seem to feel need to take on others work and put in. overtime—could be because they are too conscientious”</i>

e. Self-Care Best Practices

From these four subthemes in wellbeing and self-care came some top suggestions for self-care best practices. However, we must highlight again— as several participants note—although there are some best practices and supports/resources from leaders and organizations, self-care is a very individual process, such that what works for one person may not work for another person.

Therefore, in addition to these individualized behaviours (or what we would call recovery behaviours; see, for example, Sonnentag & Fritz, 2005; Stevens, 2010), there are many best practices at the leader, group, and organization levels that can support individual health. For example:

- Self-care needs to be modeled by all work community members, especially at the leadership and upper management levels (e.g., using one’s vacation time)
- It is important for organizations to be genuine and encourage behaviours that reflect their values (instead of saying one thing and encouraging other behaviours)
- We have to “own” our self-care: It is our responsibility; We are our own best health care professionals.
- Develop skills to allow practical strategies to prioritize and delegate work. Learn how to carve out some time away and have plan to disconnect (to fully recover)
- Engage in activities on a daily basis in order to recover.

A few participants mentioned that a lot of self-care is about taking accountability for your own actions and seeking help.

“If know I’m not good at self-care, [my best strategy is] finding a supportive colleague and keeping each other accountable to make time for self-care.”

One participant noted that her organization had corporate check ins. She noted that she was not good at self-care. Her leader also indicated that they weren’t good at this, so they both *“agreed to have weekly check ins to ask each other what we are doing to help ourselves. To me, accountability is the key to actually participate in self-care.”*

In talking about wellbeing, many participants noted the role of the organization in creating stressors and demands, and leaders’ responsibility to support their workers.

Leaders must be able to acknowledge organizational stress when they see it and start to address it some way so they can *“bring people together and define it and [identify] what they need to keep going and move forward.”*

CONCLUSION AND MOVING FORWARD TO COACHING

Through our systematic process of conducting focus groups and interviews, and extracting themes from the data, we have identified the key factors in moving toward a coaching program for fostering inclusive leadership and supporting inclusive workplace cultures in terms of six key themes:

Overall Themes
1. Inclusive Leadership Behaviours
2. Coaching & Training
3. Organizational Context
4. Coworker & Group Behaviours
5. Challenges for Women & Inclusion
6. Self-Care, Balance, & Wellbeing

We reviewed and compared the inclusive leadership behaviours to past work on highly effective leadership models, including Transformational Leadership. Although there was a lot of overlap among the key behaviours, the focus groups and interviews offered new perspectives and foci for inclusive leadership, above and beyond what is presented in many current leadership models. The data also suggested some themes/topics that may be missed in current inclusive leadership scales.

It became evident from the data that leadership behaviours were deeply intertwined with organizational policies and practices, and coaching/training initiatives. However, there often is a disconnect between policies and actual practices. When talking about how to help individual employees, one male CEO noted that one of the key aspects to remember is that:

*“Policies are there to help you make decisions for employees... not meant to be [hard] rules...
... we need to tailor [policies] and be flexible”*

That is, the policies actually need to be enacted in practice, and they *“need to be flexible enough to support workers.”* For example, if an accommodation is out of the scope of an existing benefit, the leader’s role is to tailor it to support the individual worker. Organizations (and inclusive leaders) need to walk the talk:

“They can’t say it is important, but then do nothing about it or engage in behaviours that are counter to it.”

Developing the key themes allowed us to create a process for coaching and for organizing the participants’ comments. We also delved into each of these themes to identify sub-themes that would help with the training content and process. Therefore, based on the overall themes and subthemes identified from the FGIs, and based on the coaching literature, and our past work, we developed a coaching process to maximize the learning outcomes.

Table 7: Tentative Process in Developing an Inclusive Workplace

Inclusive Workplace Coaching – Tentative Process
LEADER-LEVEL COACHING
<p>1. Create Awareness & Buy-in</p> <ul style="list-style-type: none"> a. Increase awareness and buy-in of top management and leaders (acceptance, empathy, increased visibility of issues using an evidence based approach) b. Develop understanding and awareness around EDI issues and challenges to women in organizations (increased visibility of issues & situate in larger context of justice in general) c. Develop awareness of the key actions and behaviours that support inclusive leadership and inclusive workplaces d. Develop self-awareness in leaders (how our own biases and behaviours affect others) and hold one’s self accountable e. Develop awareness around the legal responsibilities and equity issues at work
<p>2. Develop inclusive leadership skills</p> <ul style="list-style-type: none"> a. Identify own strengths, biases, and developmental areas (self-evaluation; see above) and develop an individual growth plan <ul style="list-style-type: none"> i. <i>“Create a leadership skills evaluation/assessment of learning skills - strengths and weaknesses... What do you bring to the table?”</i> ii. <i>“Create a practical toolbox of skills in their own thinking and in their organization: Create a personal pathway”</i> iii. <i>“Develop a leadership plan (that they can share with others)”</i> b. Share experiences, failures, and best practices c. Role model inclusive leadership behaviours d. Be active, vocal, and vulnerable (admit when wrong) <ul style="list-style-type: none"> i. <i>“Develop a voice”</i>
<p>3. Practice behaviours/skills</p> <ul style="list-style-type: none"> a. Integrate into your daily routine b. Repetition is important c. Be active and vocal
<p>4. Seek out support (allies/mentors/sponsors)</p>
GROUP LEVEL COACHING
<p>1. Create Awareness & Buy-in (see above)</p> <ul style="list-style-type: none"> a. How are you supporting an inclusive workplace? b. What are your strengths and areas for development?
<p>2. Help develop a group plan to support an inclusive workgroup/workplace</p> <ul style="list-style-type: none"> a. How can you support the leadership? <ul style="list-style-type: none"> i. Developing ally/sponsor/mentor and general supportive behaviours

Inclusive Workplace Coaching – Tentative Process (Continued)

ORGANIZATIONAL-LEVEL ACTIONS

1. Create Awareness & Buy-in (see above)
 - a. How are you supporting an inclusive workplace?
 - b. How are you detracting from an inclusive workplace?
2. What are your organizational goals?
3. Identify organizational challenges to an inclusive workplace
4. Identify the resources that the organization is providing to build an inclusive workplace
5. Take tangible actions – Identify metrics

Study Limitations

Because of the timing of the data collection (summer; some workers and organizations were transitioning back to work while others were still working from home), people were not as available (due to holidays, transitioning back) as they otherwise would have been. Thus, it was more challenging to gather data. We took several steps to ensure a broad range of personal and work demographics to ensure a broad range of expertise and experiences. However, despite these efforts, we had fewer minorities and fewer workers from male-dominated organizations and blue-collar workplaces than expected. Despite these issues, the information we received was relatively consistent across all participants, lending confidence that we had fully addressed the issues.

Implications and Moving Forward

This study has systematically reviewed and identified key themes in developing and fostering inclusive leadership and organizational culture. Participants also provided many practical best practices based on their experiences and expertise. The themes can help organizations identify areas they need to address, and the best practices can provide examples of initiatives they may implement to help support their inclusive workplace actions.

Moreover, we are integrating the skills, behaviours, training suggestions, and processes identified in this study into the coaching aspects of Phase 3. We are creating a manual of the themes, stories, examples, etc. to share with participants. Because of the leader- and group-centric nature of the proposed coaching, we will tailor the content and process to meet individual needs. We will then further analyze the efficacy of the components, in terms of perceived utility, satisfaction, and individual leadership and wellbeing outcomes.

Summary

Through these focus groups and interviews, we identified the key behaviours needed for inclusive leadership and developing inclusive workplaces. Many of the behaviours and skills are similar to behaviours and skills mentioned in all leadership models. However, the emphasis on community and inclusion (both individually and as a group), as well as a self-awareness into one's own behaviours, add to our existing knowledge of inclusive leadership.

We also identified factors pertaining to the content and process of training, along with best practices for training and coaching. One of the key aspects about training and about inclusive leadership in general was that it has to be a group effort and that context matters. Therefore, we focused on the impact of the organization and how to incorporate the culture change into the program. This theme also tied into the theme of the impact of the group, and the importance of developing supportive collegial behaviours. The theme of “Challenges” was presented separately, as a way of highlighting many of the comments around the problems women have encountered in organizations and in leadership roles, as well as the difficulties associated with developing inclusive workplaces.

Finally, we looked at self-care, both of leaders and direct reports: The role of the leader is integral to the health of their direct reports, but their own health is equally important. Moreover, the support and resources provided by the overall organization can't be overstated: They are integral to the healthy and effective functioning of the workplace.

One of the more positive themes that emerged from the discussions was that times are changing, and participants are seeing behaviour changes within leaders and policy changes within organizations:

“There has been a tremendous change in men's attitudes over the years. Younger men already accept that ... decisions [and including women] have to be fair.”

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