



## Feeling included and excluded in organizations: The role of human and social capital<sup>☆</sup>

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### ABSTRACT

We rely on social identity and self-categorization theories to investigate how human capital and social capital may be associated with a sense of inclusion and exclusion. We conducted a qualitative study in a professional academic association, since these organizations exist to serve both the profession and the professionals they represent and should therefore foster an inclusive environment for their members. Respondents provided information about their experiences of inclusion and exclusion in the association. Our results suggest a complex interplay between human capital and social capital leading to experiences of inclusion and exclusion. Inclusion was most frequently associated with social capital and involvement in association activities, whereas exclusion was attributed to (a lack of) both human capital and social capital. Further, we found evidence that members may experience *both* inclusion and exclusion, and that these experiences could be associated with their identification with multiple sub-communities within the Association.

### 1. Introduction

Professional associations are organizations "...which have the goal of 1) advancing a particular profession, 2) advancing the interests of individuals engaged in that profession, and 3) advancing or maintaining the public interest in the profession" (Speight, 2015: 59). They exist to organize skilled workers (or 'professionals') into a community which creates and disseminates knowledge related to their professional work (Abbott, 1988; Adler et al., 2008), including providing members with opportunities to build their skill sets through training opportunities and facilitating relationships with others in the profession (Greenwood et al., 2002). These organizations can be powerful and influential in that they set the conditions for membership within the profession, such as certification or licensing requirements, as well as additional standards related to professional conduct (e.g., Greenwood et al., 2002). They essentially claim occupational monopoly in an area of practical expertise (Adler et al., 2008; Johnson, 1972). Therefore, individuals who desire to work in the profession are likely to seek membership in the representative association to feel included and legitimize their qualifications (i.e., human capital; e.g., Becker, 1964; Nyberg & Wright, 2015).

Professional associations welcome these qualified individuals, eager to include them in the membership count, since growth contributes to the legitimacy (e.g., Cant & Sharma, 1995) and power of their organization within society (e.g., Greenwood et al., 2002). Those who do not meet the requisite standards of the profession are naturally excluded from membership (Abbott, 1988; Silver, 1994).

Based on professional associations' purpose and membership criteria, they may seem to outsiders to be homogeneous communities (Powell, 1991) in which everyone experiences a sense of inclusion. In actuality, associations may comprise a heterogeneous mix of individuals who may categorize themselves into different groups or sub-communities based on the distinct philosophies they hold regarding issues like the current and future state of the profession (Greenwood et al., 2002). Variation in the sub-communities' connection to the association's power and decision structure potentially creates status differences for these sub-communities (e.g., Smith et al., 2012) within the membership. This suggests that, contrary to expectations of inclusion based on perceptions of homogeneity (Powell, 1991), some members in professional associations may experience exclusion. This is consistent with the paradoxical findings of Solebello, Tshirhart, and Leiter (2016), that

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non-profit associations' efforts to become more inclusive (i.e., increase membership) may result in current members' resistance to such efforts in their desire to maintain an exclusive nature to their member status.

We believe that this potential contradiction in association members provides an interesting opportunity for us to study our primary research question: how and why do experiences of inclusion and exclusion occur, even within organizations whose missions relate to advancing the interests of all individuals engaged in that profession. Understanding what contributes to the perceptions of inclusion and exclusion is critical for all organizations, since performance and turnover are key metrics to organizational success and have been shown to be influenced by these perceptions (e.g., Nishii & Mayer, 2009). We also feel understanding how inclusion and exclusion occur is particularly important for professional associations because, if exclusion can occur among their members, it essentially works against achieving one of the primary reasons for their existence – advancing members' interests (Speight, 2015).

To help answer our research question, we draw from social identity (e.g., Tajfel & Turner, 1979, 1986; Hogg & Terry, 2000) and self-categorization theories (e.g., Turner et al., 1987), along with the concepts of human capital (e.g., Becker, 1964; Nyberg & Wright, 2015) and social capital (e.g., Coleman, 1988; Nahapiet & Ghoshal, 1998). Human capital represents the knowledge and skills that people accumulate such as education, training, and work experience (Becker, 1964), and social capital is "the ability of actors to secure benefits by virtue of membership in social networks or other social structures" (Portes, 1998: 6). We believe that social identity and self-categorization processes based on human and social capital considerations could facilitate both inclusion and exclusion. For example, association members may choose to self-categorize into sub-communities based on significant differences in opinion. Some members may be concerned about conserving traditional professional standards related to desired human capital (Abel, 1989), whereas others may seek to pursue new or broader norm expectations for acceptable kinds of professional qualifications (Greenwood et al., 2002). Based on self-categorization ideas, members in each sub-community may develop a strong sense of inclusion with those like themselves based on similar philosophical beliefs, and contrast themselves with members outside it through the process of stereotyping and depersonalization (Ashforth, Harrison, & Corley, 2008). This attempt to separate in-group from out-group members could create perceptions of exclusion within the association among some members. Given these arguments, we investigated our proposition that human capital and social capital can lead to inclusion and exclusion in organizations by conducting a qualitative study of an academic professional association.

This study makes three valuable contributions to management research and practice. First, we advance the existing inclusion and exclusion literature through the application of a new theoretical lens – social identity and self-categorization theories, as well as the two new explanatory concepts – human and social capital. This new approach deepens our understanding of the factors that contribute to both inclusion and exclusion beyond the typical demographic influences like race and gender, and may open new doors for future research efforts in, and practical solutions to, reducing exclusion within organizations. Second, we extend theory on human and social capital by exploring the nature of the relationship between these two factors, instead of only examining them as separate antecedents. Most past research in this area has studied them in isolation and has not considered the relative importance of each, nor the possibility that they may interact to create results (e.g., Nyberg & Wright, 2015). Such examination also allows us to investigate how both human and social capital, while important for career development (e.g., Lin & Huang, 2005), can also produce negative outcomes (e.g., Metz & Tharenou, 2001), such as exclusion. Finally, we utilize a unique sample of a professional association to enhance our understanding of the development of inclusion and exclusion among professionals. To our knowledge, there are no published studies that examine inclusion and exclusion within an organization designed specifically to be supportive of its members. This should help us provide valuable insight into how

and why inclusion and exclusion can exist in this unique environment, as well as generalizable knowledge that suggests possible ways to combat exclusionary practices in all types of organizations.

We begin by elucidating the concepts of human capital and social capital, drawing from social identity theory to explain how social categorization, identification, and comparison processes can result in inclusion and exclusion in professional associations. We then discuss the elements that exist within professional associations that relate to the current study. Next, we describe our data collection and analytical procedure, including a brief history of our study's association. We believe this historical information is beneficial, since many of the values held by current members are based on those of its founding members. Finally, we report on the results and discuss the implications of our findings. As anticipated, association members who felt excluded attributed their experiences to both human capital (e.g., degree attainment, place of employment) and social capital (e.g., lack of access to networks and social events). However, in contrast to our expectations, respondents attributed inclusion mostly to social capital as well as to their own initiative or agency in becoming involved in the activities of the Association.

## 2. Conceptual background

### 2.1. Human capital

Over fifty years ago, Becker published his seminal work on human capital, defined as the knowledge, skills, and other attributes held by an individual, such as level of education and work experience (e.g., Becker, 1964). Today, researchers from various disciplines study human capital as it relates to economics, psychology, human resource management, and other fields (Nyberg & Wright, 2015). An accumulation of greater human capital is better, for both the individual and the organization. For example, past research has shown that a person's human capital is associated with benefits such as career success and opportunities (Metz & Tharenou, 2001), as well as improved task performance (Becker & Gerhart, 1996). The drive to gain better and updated human capital may correspond to individuals seeking membership in professional associations, due to program and training opportunities for members to build knowledge and skill (Abbott, 1988; Adler et al., 2008). Becoming a member means joining a community of like-minded people with similar professional interests and goals (e.g., Greenwood et al., 2002), which may create a sense of being included in the profession. For association members, being perceived as having the 'right' human capital also helps to develop a reputation among colleagues, creating the opportunity to build productive professional connections with others who have similar backgrounds, skills and knowledge (e.g., Speight, 2015).

### 2.2. Human capital's relationship with social capital

There are numerous definitions of social capital. Bourdieu (1986) described social capital as "the sum of resources, ... that accrue to an individual or a group by virtue of possessing a durable network of more or less institutionalised relationships of mutual acquaintance and recognition" (p. 248). Coleman (1988) and Lin (2017) extended this by stating that individuals engage in social interactions and networking to develop mutually beneficial ties. At the core, social capital is an investment in social relations for expected returns (Lin, 2017). According to Lin (2017), and Kwon and Adler (2014), social capital facilitates information flow, exerts influence on others, bestows individuals with social standing, and reinforces recognition and identity for individuals, all of which are necessary for social exchanges. We share the same perspective and conceive social capital as a benefit or resource that may accrue to an individual based on his/her relationships with others (Adler & Kwon, 2002; Portes, 1998).

Paralleling human capital, the accumulation of social capital contributes positively to professional success (e.g., Daly & Silver, 2008; Lin

& Huang, 2005; Metz & Tharenou, 2001). Furthermore, it is a personal asset or resource associated with privilege and elitism (Daly & Silver, 2008). However, social capital can support dark tendencies such as corruption, nepotism, sectarianism, and inequality (Woolcock & Narayan, 2000). It takes considerable effort and talent to develop social capital, and once acquired, individuals who possess it may seek to protect and restrict others' access to maintain the advantage they have gained (Daly & Silver, 2008).

While human capital and social capital have been examined simultaneously (e.g., Metz & Tharenou, 2001), there is little research that examines the relationship between the two. In one study, Lin and Huang (2005) found that social capital fully mediated the relationship between human capital and career mobility, suggesting that human capital plays a role in developing social capital. Given Nyberg and Wright's (2015) call to "...spend more time focusing on the social capital element and its connections with HC (human capital)..." (p. 289), and consistent with Lin and Huang (2005), we expound on why human capital facilitates social capital below.

According to Kwon and Adler (2014), individuals generate social capital through three main processes: a) structural opportunities, b) motivational norms and values, and c) personal abilities. Based on the definition of human capital as representative of a particular individual's knowledge, skills, and abilities, it seems that human capital as defined by Becker (1964) is associated to the social capital concept of 'personal ability,' which is described by Adler and Kwon (2002) as the competencies and resources of an individual. Further, Kwon and Adler (2014) argue that the amount of social capital an individual accumulates is directly related to the valuable personal abilities and competencies that the individual has to offer others in the unit or network. This view is consistent with Nyberg and Wright's (2015) summation of human capital as the "...attributes that can make an individual more likely to perform specific tasks well" (multiple past research cited; p. 289), which accrues benefits to the individual or organization. Based on these parallel arguments, we expect that human capital will directly influence an individual's ability to create social capital.

### 2.3. Social identity theory

Building social capital is about engaging in relationships with other individuals and groups (e.g., Adler & Kwon, 2002; Coleman, 1988). To understand why people seek to develop and maintain relationships with others, we turn to social identity (e.g., Tajfel & Turner, 1979; 1986) and self-categorization (e.g., Turner et al., 1987) theories. Fundamentally, social identity theory explains how individuals construct their social identity through memberships in groups that are salient to their self-concept (e.g., Ashforth & Mael, 1989). Seeking to build self-esteem, they join groups and organizations related to and supportive of important aspects of their identities, such as their occupation (e.g., Kwon & Adler, 2014; Tajfel & Turner, 1986). Once individuals self-categorize into these groups or organizations (e.g., Turner et al., 1987), they experience the process of identification by adopting the norms and prototypical behaviors associated with group members (e.g., Ashforth et al., 2008; Hogg & Terry, 2000), developing a sense of belonging to the group (e.g., Ashforth & Mael, 1989). They reinforce their identity and self-esteem by positively comparing their membership group with other groups, delineating 'in-groups' and 'out-groups' (e.g., Ashforth et al., 2008; Tajfel & Turner, 1979; Turner et al., 1987), and forming an 'us' versus 'them' dynamic.

Human and social capital can elucidate the processes of social identity and self-categorization in a few ways. First, human capital may be the basis on which self-categorization into particular groups and organizations occurs. For example, education and occupation tend to be self-identity markers (e.g., "I'm a doctor;" "I'm a professor"), and therefore could provide the impetus for joining a professional association. Further, identification and comparison processes based on human capital create clear delineation between in-group members who have

the same knowledge and training, and those that do not (Turner et al., 1987), allowing in-group members to experience feelings of esteem, respect, and belonging with similar others (e.g., Ashforth & Mael, 1989), likely leading to perceptions of inclusion. Certainly, individuals who are connected to one another through similar identities and group membership create in-group relationships that result in accruing desirable social capital, facilitating career development and opportunities (e.g., Daly & Silver, 2008; Metz & Tharenou, 2001). Further, in-group members may seek to protect this social capital from 'others' who they feel do not have the requisite qualifications or fit the prototypical behavior norms, by ensuring that these out-group individuals are excluded from in-group membership or associated rewards (e.g., Hogg & Terry, 2000; Turner et al., 1987).

All these points suggest that professional associations may provide an inclusive atmosphere for members with similar interests and human capital, based on the concept of homophily (e.g., Greenberg & Mollick, 2017). This is consistent with the purpose of associations to assist members in developing their professional human and social capital (e.g., Lee, 1995). However, we believe it likely that different sub-communities develop within the association, based on members with different ideas about entry standards, professional norms, and traditional values. This would create an in-group and out-group structure within the association, leading to variation in members' perceptions of inclusion and exclusion.

### 2.4. Human and social capital can result in inclusion and exclusion

Inclusion within work organizations can be defined as "... the degree to which an employee perceives that he or she is an esteemed member of the work group through experiencing treatment that satisfies his or her needs for belongingness and uniqueness" (Shore, Randal, Chung, Dean, Erhart, & Singh, 2011, p.1265). Although this definition refers to 'employee,' the degree to which an individual perceives that he or she experiences treatment that indicates a sense of belonging, also applies to the non-employment based membership in associations. Defining exclusion, however, is a bit more challenging. Exclusion has its roots in the literature on marginalization and deprivation in society in general (e.g., Daly & Silver, 2008), and there are myriad definitions and paradigms (Silver, 1994). The one that seems to best describe exclusion in work organizations is related to Silver's (1994) specialization paradigm, in which society consists of separate and competing social spheres: "... the extent to which group boundaries impede individual freedom to participate in social exchange" (p. 543). Further, Adam Smith (1776) expressed exclusion as the difficulty experienced by deprived individuals while taking part in community life.

To understand how human and social capital may contribute to inclusion and exclusion, we use the social identity processes of social categorization and identification (e.g., Turner et al., 1987) as they relate to human and social capital. Consistent with Lin and Huang (2005), we believe that high levels of human capital may facilitate social capital in professional associations, and high levels of both human and social capital can provide instrumental benefits such as information, influence, and social credentials (Kwon & Adler, 2014; Lin, 2017). An in-group sub-community may develop through allegiance to perceived higher traditional standards and norms, as members seek to join and identify with others who hold similar ideals. These members will likely strive to maintain what they view as their group's and the professional association's 'elite' reputation through the pursuit of higher-level practices. To accomplish this, they engage in exchanges on professional best practices, plan and participate in private activities, coveted keynote or invited panels, and support each other for leadership opportunities and recognition, since they consider themselves to be amongst the 'best' of the profession. They may also believe it is their responsibility to protect the association's possible competitive advantage over other associations in the profession (e.g., Coff & Kryscynski, 2011; Nyberg et al., 2014), and so create self-perpetuating processes that control or influence association governance, norms, and the reputation of the association as

whole. Members of this sub-community will likely experience a sense of solidarity and belonging, equivalent to a feeling of inclusion (e.g., Shore et al., 2018) with those who possess similar human and social capital, ultimately reinforcing their self-concept and self-esteem.

Conversely, we posit that exclusion may happen through the social comparison stage of the social identity process (e.g., Tajfel & Turner, 1986). Individuals who are qualified to be members of the association, but who do not meet the primary in-group's valued standards for human capital, are treated as out-group members. To maintain the distinction between the two sub-communities, members will stereotype individuals who belong to the other group (e.g., Hogg & Terry, 2000; Turner et al., 1987), such as 'those people are snobby' or 'those people are not as capable.' Depersonalization will also occur in that individuals are no longer viewed as unique entities; they are simply ascribed the prototypical behaviors, values, and norms of the 'other' group (e.g., Hogg & Terry, 2000). Consequently, this 'us' versus 'them' dynamic results in some members not having access to the same level of information, support, or leadership roles (e.g., structural opportunities) as in-group members, which are primary benefits of accessing valuable social capital (e.g., Kwon & Adler, 2014). To summarize, due to a perceived lack of the 'right' human capital, some association members may be excluded from building professionally advantageous social capital. If so, they are prevented from experiencing the benefits they expected to accrue from association membership, such as access to professional opportunities and career mobility. This process represents the situation described in the definition of exclusion – "...group boundaries impede individual freedom to participate in social exchange" (Silver, 1994: 543). In social settings, exclusion results in isolation (Abrams et al., 2004), marginalization, discrimination (Oxman-Martinez et al., 2012) and segregation (Galabuzi, 2006). Thus, exclusion within professional associations may result in deprivation of opportunities as well as upward career mobility.

There is an important caveat to the arguments presented above. In smaller, perhaps more local associations, just a few sub-communities may exist, reflecting a simple in-group/out-group structure. However, in large associations, multiple sub-communities may develop based on myriad human capital factors such as current employer, type of industry, research or disciplinary interest, country of origin homophily, or even educational attainment and degree institution. Members in large associations may find themselves connected to multiple sub-groups, some of which may have a higher profile or higher status than others. In this context, members' perceptions of inclusion and exclusion within the association could be very complex. We would anticipate that members might experience inclusion in some sub-communities and yet perceive exclusion in others, arising from multiple loci of identification (Ashforth et al., 2008). Any of these sub-communities may be seen as representative of, or agents of, the overall association. Thus, if a member experiences a mix of inclusion and exclusion occurrences, it may be difficult to develop an overall opinion about being included or excluded from the association as a whole, resulting in blended perceptions.

In summary, given arguments based on social identity theory (e.g., Hogg & Terry, 2000; Tajfel & Turner, 1986; Turner et al., 1987), we anticipate that members' perceptions of inclusion will be driven by similarities in human capital characteristics, which open the door to building social capital with colleagues in the association. We further believe that association members who experience exclusion will attribute it to either or both human capital and social capital.

## 2.5. Professional associations

Our research site is an academic professional association (hereafter referred to as the 'Association') founded to advance the profession of university professors and their careers. The criterion for admission into academic associations is generally the pursuit or attainment of a doctorate degree (Bain & Cummings, 2000). Members join academic associations to connect with other professors or rising doctoral students, pursue academic positions, exchange ideas, and jointly advance their

field of research or scholarship (e.g., Cahn, 1956; Masrani et al., 2011). Academic associations are also responsible for establishing the ethical and professional standards related to teaching and research, consistent with Greenwood et al.'s (2002) claim that "An important role of the professional association is thus the construction and maintenance of intra-professional agreement over boundaries, membership, and behavior" (p. 62). Academic association leadership is typically styled after a self-governance system (Van Tassel, 1984), and consists of volunteer members who are elected by other members.

Our study's academic professional association provides a distinctive opportunity to explore the potential effects of human and social capital. Associations are different from for-profit organizations in that most members join professional associations specifically to validate their human capital and build social capital (e.g., Stolle & Rochon, 1998). Associations' missions include assisting members develop new knowledge and skill related to the profession by providing training and idea dissemination opportunities (e.g., Greenwood et al., 2002). This reflects the maintenance and growth of important profession-related human capital and facilitates the ability of the members to keep up with changes in recommended performance standards and practices. Further, several sociologists (Stolle & Rochon, 1998) have utilized association member status as a proxy measure of social capital on the assumption that members build social capital through their membership.

In the professoriate, human capital characteristics, such as where an individual obtained his/her doctoral degree and publication record, may indicate that an individual is more competent, better accomplished and, thus, more desirable as a member. On one hand, being a 'proven' commodity may earn the individual respect from his or her peers, who in turn view a relationship with that individual as beneficial. Existing members may view the individual as a potential resource for new research ideas, a possible collaborator, or a future member at their institution. Perceptions of valuable human capital also may enable an individual's access to influential members in the association, coveted positions at respected universities, and a sub-community that can enhance academic career success. In this regard, individuals who have the perceived 'right' human capital are able to build social capital. On the other hand, individuals who are perceived to lack the 'right' doctorate, obtained a degree from a program that does not have a strong reputation, or who are perceived to not have published well or enough, may be avoided when developing professional relationships because connecting with them could present reputational risk. These perceptions likely will prevent the association member who lacks the 'right' human capital from building social capital. This will ultimately result in them experiencing exclusion in the association. In sum, our research utilizes human capital, social capital, and social identity to address the research question: how and why do experiences of inclusion and exclusion occur.

## 3. Method

### 3.1. History of the association

The Association was founded over half a century ago. Its founding members were employed at elite universities and colleges, which served as models for establishing association values that reflected the missions of their academic institutions. Specifically, the Association placed a higher value on research than teaching, since research was and still is viewed as more prestigious (i.e., knowledge discovery reflects greater ability and innovation than knowledge dissemination). Also, around the same time the Association was founded, the overall discipline represented by the Association was trying to gain scientific legitimacy that can only be earned through research. That could be why the founders favored professors with PhDs to discuss the 'philosophy of the discipline.' As the Association grew and matured, conferences were organized to showcase their discoveries (i.e., discuss and present their research papers); these events were originally designed for scholars, not practitioners.

The number of people who earn PhDs and who are interested in the disciplines represented by the Association has increased since its inception. These factors have boosted membership numbers and diversity. In fact, the Association's structure is now based on multiple units, primarily organized by research interests. The current professional association consists of members with wide-ranging qualifications, not all of which fully align with the research-focused vision of the founders. Specifically, the Association's membership currently encompasses members from multiple countries; research-focused as well as teaching-focused professors; individuals working in highly ranked through unranked institutions; private scholars, students, and practitioners. This suggests that there may be perceptions of varying levels of human capital among the members, as well as different levels of social capital based on within-Association networks. With this broadening of membership diversity comes conflict about what the Association should be, who it represents, and what it values.

### 3.2. The study

Since there are no published studies that examine inclusion and exclusion in professional organizations that are designed specifically to be supportive of its members, a qualitative inquiry was the appropriate way to address the exploratory nature of our research question (Creswell, 2003). We needed to "explore individual understandings and subjective experiences" (Cunliffe, 2011, p.649) of members of a professional association to understand the contribution of human and social capital in producing experiences of inclusion and exclusion. We chose to collect this information via a survey with open-ended questions due to the Association's large size. The open-ended questions enabled participants, as "reflective individuals" (Cunliffe, 2011, p. 651), to express in their own words their felt inclusion and exclusion. We wanted to be sensitive to "the interpretations and meanings given to the situation by those whose social world is being studied" even though we (as researchers) had some knowledge of the phenomena of interest (Heath & Cowley, 2004).

The research team received permission from the Association to survey its members on experiences of inclusion and exclusion. The Association's leaders were briefed on the study's objectives, approving the survey and accompanying letter prior to distribution. The letter explained (to the Association's members) that the study was endorsed by the Association, and that it was designed to learn about its members' perceptions and experiences of inclusion and exclusion in the Association with the goal of enhancing members' experiences. An invitation to participate in the survey was sent to half of the Association's members, randomly chosen, via its intranet. A reminder email followed four weeks later. Recipients were informed that participation was voluntary and assured anonymity. We did not offer incentives to participate. Upon the study's completion, we provided a report of the findings to the Association's governing body and recommended that the findings be shared with members. A total of 715 members completed the survey, which was consistent with the Association's previous survey response rates<sup>1</sup>.

The survey comprised both structured and semi-structured questions. In the structured component of the survey, we asked the participants to provide their socio-demographic information. In the semi-structured component of the survey, we asked participants to think of experiences of inclusion and of exclusion at the Association, and to describe them.

### 3.3. Measures

We introduced the survey with the following statement of purpose: "This survey was designed by the [research team] to learn about

members' perceptions of inclusion and exclusion in the [Association] with the goal of enhancing members' experiences."

#### 3.3.1. Structured survey questions on socio-demographics.

The structured section of the survey comprised seven questions on the participants' background, to describe the sample. All questions had a 'prefer not to answer' option. *Gender* encompassed the following items: male, female, transgender, other. *Race or ethnicity*, *Country of origin*, and *Age* were three separate open-ended questions. *World region* in which the participant currently resided encompassed Asia, Middle East, North Africa and Greater Arabia, Europe, North America, Central America, the Caribbean, South America, sub-Saharan Africa, Australia and Oceania. *Academic rank* listed 11 options: Doctoral student, Adjunct, Lecturer (non-tenured), Lecturer (tenured), Senior Lecturer, Reader, Assistant Professor, Associate Professor, Professor, and Not an Academic. The last question asked if they had *served in an elected office* in the Association and offered Yes and No responses.

#### 3.3.2. Semi-structured survey questions on inclusion and exclusion.

We asked participants "Can you think of a time when you felt included at the [Association]? Please describe the event, and also, why you think you were included."

We also asked participants "Can you think of a time when you felt excluded in the [Association]? Please describe the experiences that made you feel excluded."

### 3.4. Analysis

To analyze the survey data, we computed descriptive statistics on the structured components, and conducted content analyses on the semi-structured components. To investigate how and why experiences of inclusion and exclusion occur, we used a hybrid thematic technique (Braun & Clarke, 2012) for data analysis. Thematic analysis facilitates a straightforward coding of participant narratives and it is deductive when it relies on a prior theoretical framework (Boyatzis, 1998). Our thematic analysis can be described as 'hybrid' because it started by allowing categories to spontaneously emerge from the data and, thus, was initially inductive. We were interested in understanding the various ways in which the Association members interpreted inclusion and exclusion experiences in relation to others ("...possible meanings and fluid interpretations potentially shared between people"; Cunliffe, 2011, p.659). We then drew on our knowledge of the human capital and social capital literatures to group categories into themes. Thus, the aggregated (2nd stage) data categories were grounded in our theoretical knowledge of social and human capital theories. These theories became an organizing framework (Creswell, 2003) to develop a model of the underlying structure of inclusion and exclusion in the academic professional association (Thomas, 2006). In this regard, the data analysis was deductive. We present our model at the end of the results section.

Two researchers familiar with the study and experienced in qualitative data analyses, namely the first author and a faculty colleague, independently coded the responses from the two semi-structured questions. One researcher coded the inclusion question; the other researcher coded the exclusion question. The researchers then cross-checked each other's coding.

The qualitative data were analyzed manually in four stages. In the first stage, each coder read the full transcript of the responses pertaining to their question and generated categories or codes. The categories were data-driven and all responses were coded. Some participants made multiple statements to describe the one exclusion/inclusion experience. These statements often culminated in one reason for the felt inclusion / exclusion. In these instances, the statements were considered together and allocated to one category. Other participants explained each of their experiences in a single, succinct sentence. When responses comprised multiple and varied statements, different portions of a response were recorded in different codes as appropriate. A coding sheet for each of the

<sup>1</sup> The survey's response rate is withheld to preserve the organization's anonymity.

two semi-structured questions was thus developed. In the second stage, the coders trained each other on their respective content coding. Each researcher then coded approximately 10% of responses pertaining to their colleague's question and the inter-rater reliabilities (IRR) between the two coders were calculated (Creswell & Creswell, 2017). The IRR was computed as the number of coding agreements divided by the total number of coded responses (Goodwin & Goodwin, 1985). The agreements were the responses that both raters coded in the same category. An inter-rater reliability of 75% or above was achieved for the coding of 10% of the responses to each of the semi-structured questions. These IRR results demonstrate good qualitative reliability of the content coding procedure (Creswell & Creswell, 2017). The two coders discussed all coding discrepancies until complete agreement was reached. In the third stage, each researcher reviewed all their coded responses based on the agreements reached. In addition, the coders ensured consistency of code names used across the two coding sheets. In the fourth (and last) stage, the two researchers grouped the first order codes into higher second order codes.

All quotes shown in-text and in the Tables are verbatim from the survey responses. We include at the end of each in-text quote the category the quote belongs to (in brackets). Further, Tables 1 and 2 include illustrative quotes ('proof' quotes; Pratt, 2009: 860). We present 'power' quotes in-text to illustrate the findings (Pratt, 2009: 860). In addition, frequency counts and tabulations were used (Denzin & Lincoln, 2008) to gain an understanding of the pervasiveness of the various experiences of inclusion and exclusion, and the reasons attributed to those experiences, consistent with other qualitative studies (e.g., O'Leary-Kelly et al., 2014). Frequencies serve to demonstrate the prevalence of responses in each category and help us rank order their relative contributions to feeling included and excluded.

#### 4. Results

##### 4.1. Sample

Of the 715 study participants, most identified themselves as male (38.7%) or female (32.2%), and the remaining did not specify (27%) or selected Other (2%). We also captured if the members were from the country where the Association is located. Slightly more than one third of the respondents identified themselves as from the Association's home country (36.9%), and one-third outside of the home country (33.7%); 29.4% did not specify. The majority of the respondents held academic-based positions, including professorial positions (75%) and doctoral students (20%); only 5% of the respondents identified as non-academic members.

##### 4.2. Experiences of inclusion

To identify and distinguish between factors that contribute to inclusion and exclusion, we also invited the participants to think of a specific time when they felt included at the Association and asked them to describe that experience. A total of 408 of the 715 survey participants provided comments in this open-ended question, but four (4) were not coded as they were ambiguous. Some of the individuals who responded to this question gave more than one reason for inclusion or described more than one experience of inclusion at the Association. In such instances, each reason or experience was coded in the appropriate category.

Table 1 lists the 21 first order codes derived from the participants' responses. Two codes fell in the second order code of Human Capital, eight in Social Capital and the remainder in the categories of Demography and Other Personal Characteristics (three codes), Involvement (four codes), Collegiality (two codes) and Conference Characteristics. Fewer than 10% of the respondents stated that they had never or rarely experienced inclusion (Not Included/Rare/Seldom category); a similar proportion stated they had often or always experienced it (Often/Always

**Table 1**  
Describe experience(s) that made you feel included (N = 4041).

Category Name	Illustrative Responses	N/ Percentage <sup>2</sup>
<b>Human Capital</b> Education / Work background	"Journal articles submitted previously"; "My 'pedigree' PhD makes me feel included..."; "My institutional affiliation was the basis for some inclusion"	(16) 4%
Recognition (Received award / Sought for opinion/ advice)	"when named as a best reviewer by [Unit]"; "Won a [Unit] award"; "I was awarded distinguished scholar one year..."; "When I win awards for reviewing in my [Unit]"; "I've felt included when others ask for and/or truly value different perspectives..."; "Other members following up post session asking for more feedback also made me feel included"	(12) 3%
<b>Social Capital</b> Connecting	"Senior member of Association staff made effort to introduce me and a few others to a group of notable researchers"; "One of the mentoring faculty there talked with me one-on-one on the consortium breaks and sat next to me at another large presentation session later"; "Met and talked with top scholars in the field and they were all very friendly and welcoming"	(184) 45.6%
Networks	"... my alma mater always does a reunion of sorts at the Association and it is where I feel the most comfortable"; "... A large group of faculty of my approximate academic "age" (i.e. advanced assistants/early associates) regularly connect"; "I have felt most included when I run into people from communities that I have been part of..."; "When I was connected to people who do similar research as I do"; "So it was the friendship and social liking that made me feel included"	(23) 5.7%
<i>Structural opportunities devised by the Association or its Units</i> Activities for new members	"New member orientation session was fantastic and addressed many of my concerns as a new member from overseas"; "The special room for first-time attendee was useful and people went out of their way to be friendly and make connections with relevant people"; "First time attendee room – felt like a safe place"; "At newcomers reception"	(4) 1%
Mentor program	"When I was invited to have a mentor"; "[Unit] has done a good job pairing mentors and mentees at the annual conference"	(4) 1%
By invitation	"There have been multiple times when my Unit has specifically asked me to serve"; "Each year when requests for reviewers come out"; "Unit members reached out to include me in serving as session discussant"	(24) 5.9%
		(33) 8.1%

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**Table 1 (continued)**

Category Name	Illustrative Responses	N/ Percentage <sup>2</sup>
Unit events & efforts (excludes Socials, and Doctoral and Junior Consortia)	“... at [Unit] events or presentations I feel included”; “Even though I missed the deadline [for the doc consortia], the wonderful [Unit] members who ran the consortium made sure that I had a place at the consortium”; “[Unit’s] efforts to include me in the different activities of [the Association]”	
Doctoral Consortia / Doctoral student / Junior Consortia (excludes other Unit events and efforts)	“I thought that the new doctoral student consortium was a great way to be introduced to [the Association], and to feel valued”; “[workshop] in [City] for doctoral students called ... the format was really well done to promote inclusion”; “Doctoral programs, which are very welcoming”; “I went to a young faculty consortium... and felt included there”; “During the new faculty consortium”	(40) 10%
(Having a) Specialty track	“interest group meeting”; “When I attended a [workshop] with other researchers (who I didn’t know) which was fairly specific”; “in 2008 when the [Unit] organized a PM track at [the Association] conference...”; “Now that there is an interest group for people who want to focus on teaching ... I feel like the [Association] finally has something to offer me”	(3) 0.7%
<b>Demography &amp; Other Personal Being different</b>	“I have presented some fairly untraditional research at [Association] meetings and had a very positive response”	(3) 0.7%
Connecting globally	“The willingness and ability to work with colleagues virtually across borders, use of skype and videoconferencing for joint Research and Association event preparations”	(1) 0.2%
LGBTI	“Overall, [Association] feels increasingly inclusive for LGBT members”;	(1) 0.2%
<b>Involvement</b> Association/Unit officer	“Volunteering for my Unit ... has generally helped me to feel included”; “Participating in groups like the [Association’s] Council”; “I was Unit webmaster for 10 years...”;	(142) 35.2%
Reviewer	“Right from the first year, I have had opportunities to review papers”; “Have acted as referee for [Association’s] Event submitted papers”; “yes, I loved to review others’ articles...”; “As a 2nd year PhD researcher, being accepted as a reviewer for the conference”; “Involvement with journals/reviewing”;	(33) 8.1%
Conference sessions	“In the sessions I attend, other researchers who have the same area of interest are warm, friendly, and welcoming”; “Discussions after presentations...”; “In the presentation sessions...”; “Sessions in which I felt genuine intellectual connections with the	(54) 13.4%

**Table 1 (continued)**

Category Name	Illustrative Responses	N/ Percentage <sup>2</sup>
Self-initiated	content of the session”; “I like the roundtable discussions. It gives good opportunities for exchange” “I have attended two conferences... and have presented two [special sessions], a [workshop], and a regular session with those two meetings”; “Helped to organize and start an interest group which became a Unit”; “...pre-conference workshops”; “when I have sought out being a part of an activity/Unit, I have always felt welcome”; “The level of inclusion is based on minimal engagement on my part”	(18) 4.4%
<b>Conference Characteristics</b> Governance / information	“I feel included when I get emails from the [Association]”; “I am asked to vote on elections, as well as submit nominations for awards”; “Am duly informed about updates and programs and job vacancies”; “When voting and completing surveys”	(29) 7.2% (29) 7.2%
<b>Collegiality</b> Inclusive Session facilitator/presenter	“...the presenters and session facilitators were exceptional for being highly aware of going above and beyond for making sure everyone felt included...”; “When I hesitate to contact presenters in the session or come into the session room awkwardly, many respond to my awkwardness with welcome manner”;	(5) 1.2% (3) 0.7%
Inclusive efforts by colleagues	“When planning a research trip to South Africa I felt very welcome and encouraged to meet with [Association] members, with a warm response from someone I did not know/had not met before. I felt very encouraged to continue to make contact with other members”	(2) 0.5%
<b>Not included / Rare/Seldom</b>	“No”; “Never”; “N/A” “I cannot think of a single time”; “Honestly, such experiences are RARE, but a few of the [the Association] researchers understand my research and share some research interests with me, by connecting each other through the SNS or emails personally, not organizationally” “Association is very inclusive for all activities I have observed”; “I found a lot of venues where I felt very much at home...”; “All the time...”; “I felt included the very first time...”; “...it has met my expectations of access to [the Association] Journals and research”; “good.. nice sense of belonging”	(37) 9.2%
<b>Often/Always included</b>	“Association is very inclusive for all activities I have observed”; “I found a lot of venues where I felt very much at home...”; “All the time...”; “I felt included the very first time...”; “...it has met my expectations of access to [the Association] Journals and research”; “good.. nice sense of belonging”	(38) 9.4%
<b>Miscellaneous</b>	“I have no interaction with [the Association] other than receiving journals”; “Only when my dean tells me that [the Association] conference is important...”; “The rest of the conference of [City] was excellent”	(11) 2.7%

Notes: <sup>1</sup> 408 respondents entered comments in this open-ended question, but four (4) were not coded as they were ambiguous. Thus, we coded the responses of 404 participants.

<sup>2</sup> ‘Percentage’ is the number of responses for each category divided by the 404 participants. These percentages add up to 115% because some of the 404 participants provided more than one reason for inclusion.

Included category). Only 2.7% of the responses were coded in a Miscellaneous category, because either the participants did not answer the question or provided ambiguous comments. We content analyzed all the responses and present the results in **Table 1**. Frequencies serve to demonstrate the prevalence of responses in each category and help us rank order their relative contributions to feelings included and excluded.

(Insert **Table 1** about here)

#### 4.2.1. The role of human and social capital in inclusion

As shown in **Table 1**, social capital attributions surpassed human capital ones as enablers of inclusion when subjects were prompted to describe their experiences. Human capital responses encompassed a mere 4% of the responses. In contrast, social capital factors, such as doctoral consortia and socials (which are structural opportunities as described by Kwon and Adler (2014)), along with networks, comprised almost 40% of the responses:

*During Doctoral Student Consortium – had a great deal of interaction with senior faculty members and peers. (Doctoral Consortia/Doctoral Student)*

*Social Events (Socials) – I feel included by Faculty members and students at my University who are part of [the Association] (Networks).*

#### 4.2.2. The role of other factors in inclusion

In addition to structural opportunities deliberately designed by the Association or its Units, proactive involvement in the Association’s conference (e.g., reviewing submissions for the meeting or presenting a paper) or leadership structures (e.g., being part of a Unit’s executive committee or volunteering for one of its non-executive committees) was a frequently mentioned as a mechanism to experience inclusion. Thus, in this study we maintained Involvement as a category distinct from Human Capital and Social Capital. An example response is:

*I feel most included when I am participating in something I am very much involved in such as ... panels which I helped organize (Involvement/Conference Sessions).*

In sum, while participants rarely cited human capital and demography as reasons for being included, they frequently attributed inclusion to social capital factors and volunteer involvement.

#### 4.3. Experiences of exclusion

We invited the participants to think of a specific time when they felt excluded in the Association and asked them to describe that experience. A total of 414 of the 715 survey participants described such an experience. Some respondents gave more than one reason for or described more than one experience of exclusion at the Association. In such instances, each reason or experience was coded in the appropriate category.

**Table 2** lists the 21 codes derived from the participants’ responses. Five codes fell under the second order code of Human Capital, another three under Social Capital and the remainder in the categories of Demography and Other Personal (six codes), Involvement (three codes), Collegiality (two codes), and Conference Characteristics. About one quarter of the responses were coded as Not Excluded, as those survey participants explicitly noted that they had never felt excluded or that this question did not apply to them (N/A). Only 4.5% of the responses were coded as Miscellaneous as they did not address the question or were ambiguous.

**Table 2**  
Describe Experience(s) That Made You Feel Excluded (N = 414).

Category Name	Illustrative Responses	(N) Percentage <sup>1</sup>
<b>Human Capital</b>		
Academic reputation	“inclusion/exclusion is largely based on what people have done / the reputation they have. People who haven’t published in a field get less credibility and attention than those who have...” “There is definitely a bias towards R1 research schools ...”; “I felt included as long as I was at a top school and junior, when I moved to a less recognized school and got tenure I was no longer included or even remembered. I was never asked again to do much of anything in the major [unit] I am a part of”; “People look at your name tag and your affiliation ... If it is not from an ivy-league or other big-name school some folk decide immediately that you aren’t worth talking to.”;	(95) 22.9% (6) 1.4%
Grad / Work Institution		(47) 11.4%
Research topic / design	“the [Association] systematically undervalues thoughtful empirical research and systematically glorifies “theoretical” research based on boxes and arrows and very little actually good theory or good empirical work.; as a result, I feel that good empirical work on demonstrably important phenomena that is based on sound research design and careful econometric identification is systematically excluded, as are the individuals who support that view.”	(10) 2.4%
Practitioner-scholar	“in the main the publications, conferences and discussions do not reflect practitioner perspectives and priorities.”; “Overall tendency not to actively include practitioners in the [Association’s] meeting programs and publications...”; “Being a consultant with an academic background”; “I know it is not a deliberate exclusion .... It is just difficult for practitioners”	(16) 3.9%
Rank	“...when one is a student one feels a like no one knows you”. “As a PHD and MBA who teaches only as an adjunct, I consistently feel detached from the [Association].”; “Overall, professors seem to be pretty “stand-offish” from doctoral students. I think this may be because some students use [the Association] as a means to aggressively get in contact with well-known people in the areas of study they hope to work in.”	(16) 3.9%
<b>Social Capital</b>		
Association Journals	“At [Association] Journals the same names often keep publishing, it sounds like to a closed club.” “to some extent editorial board membership has to do with networking rather than merit.” “Although I have published in all major journals in my area multiple times, I have never been published in [Association] outlets. This has lead me to conclude that they are very clubby.....In fact while I sit on all the editorial boards of the top tier journals in my area, I am rarely even invited to review for [Association’s] Journals ... So it isn’t that I think I am excluded, it is that I am actually excluded.”	(104) 25.1% (8) 1.9%
Socials	“At the first [Unit] social I went to, which was part of the [Unit] Doctoral Student Consortium. Never went back	(37) 8.9%

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**Table 2 (continued)**

Category Name	Illustrative Responses	(N) Percentage <sup>1</sup>
Networks	<p>to any [Unit] social, it was awful." "At [Unit] social.....people were in their own groups and not very welcoming for others to join in on their conversation. I just left." "At Welcome to [Unit] session. ... I kept trying to socialise or meet people but they were very much in their own groups meeting friends not met in some time.";"Mainly at behind the scenes events and socials that are not officially part of the [Association]." "At a reception at [Association]. This was only with invitation."</p> <p>"The senior and most connected members in the [Association] listen mostly to the other senior and most connected members. They ignore others not in their "Club" of top authors, editors, other well-known..." "People @ conferences ONLY tend to be attentive, respectful &amp; simply listen/ talk with famous [country of Association]-based full-professors. Each year, I feel excluded of most networking (and especially developmental) activities given my small &amp; relatively junior set of acquaintances within [Association]" ; "Not in the academic 'loop'" ; "Social interactions are made up of cliques that are linked to age/rank, doctoral institution, and role at the [Association] (e.g. officership)."'</p>	(59) 14.3%
Demography & Other Personal		
Age	<p>"When I was younger, I felt excluded because I didn't know anyone and did not know how to get connected to people who seemed to be there. I remember this most vividly at my first [Association conference] in 1990." "At a "meet the hiring committee" event for one university, I felt out of place. The committee was interviewing potential candidates for the position of assistant professor, and the predominance of candidates were much younger than I am."</p>	(51) 12.3% (5) 1.2%
Personal Reasons	<p>"Due to my personal problems, mostly financial, I have never been able to attend at any [Association] meeting ..." "Informal get togethers around "male" activities (e.g., basketball, poker). Likely excluded because young and female and assumptions associated with those social categories..."; "I'm a white woman, so it's all pretty indirect, mostly just a slight feeling of being "different" when it's a room full of guys"; "... it is a gender and a race thing. / [the Association] is a club of middle age and old WHITE MEN...sorry to say but it is true. / how many women lead? how many non-whites lead? how many from outside the [Association country]? / it needs new LEADERSHIP!!!!"; "...While this feeling of exclusion and isolation seems to be prevalent among individuals in my racial group, I've noticed that this is not the case for individuals in other racial groups...."</p>	(3) 0.7%
Gender / Race	<p>"Last year was my first time attending the [Association] conference and I feel excluded because I didn't really know many people..." "As a first time</p>	(8) 1.9% (7) 1.7%
Newcomer		

**Table 2 (continued)**

Category Name	Illustrative Responses	(N) Percentage <sup>1</sup>
Religion	<p>attender at social events in my Units – felt like a novice still in process of forming research identity, limited familiarity with people/Unit" "...Many important events and opening ceremonies are now held on Sunday mornings. However, this is a time set aside by many for worship..." ; "When the [Association] made the decision to hold its major program welcome events on Sunday mornings. As a Christian who regularly attends church and observes a Sabbath from work on that day, I felt very much excluded from the Association's thinking"</p>	(4) 1%
Country Centric	<p>"I realise this is an [Association country] conference, however it feels as though in some of the more mainstream Units such an HR, international management it is dominated by [Association country] professors and quantitative papers..." ; "Participating in large [Unit] meetings such as ..., as a member of colour from a country outside of [Association continent], is a disadvantage. Members from my region were seldom part of the leadership team (even when there is a person who gets nominated to these positions)" ; "Being in a different country makes it difficult to participate ..."</p>	(24) 5.8%
Involvement		
Lack of volunteer opportunities	<p>"I volunteered for several committees and was never selected..."; "I tried to get involved in a particular [Unit] and every time I volunteered for something I was told they were full and could not use my help. This went on for several years and finally I decided to pursue involved in another [Unit]."</p>	(23) 5.5% (15) 3.6%
Rejection Session / Workshop / Symposium	<p>"I picked up [the Association] as a platform for career development. I submitted two consecutive years [session] proposals (with support from about 20 members ...). Both times my [session] is rejected."</p>	(1) 0.2%
Paper rejected	<p>"My conference submissions have not been accepted. Little feedback has been provided as to why not. It appears that the reviewers do not care about the topic I have written about." ; "Always. If I submit a paper, it will be rejected within an hour. So, what is point of membership"</p>	(7) 1.7%
Collegiality		
Non-collegiality by senior scholars	<p>"I saw a renowned professor and went up to speak to him, and he completely pushed me away and ignored me. It was a very embarrassing moment and I never wanted to come back to [Association] again"; "I was at a junior faculty consortium and one of the senior faculty members who was supposed to be a "mentor" literally verbally attacked me and insulted me and my work in front of the whole round table..."</p>	(17) 4.1% (7) 1.7%
Rude comments	<p>"At my very 1st [Association] meeting, the discussant made incredibly caustic comments about my sole-authored student paper to a packed audience. I felt so humiliated that I never went back to that paper to write it up for publication." ; "...was told by the moderator that it was not designed for</p>	(10) 2.4%

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**Table 2 (continued)**

Category Name	Illustrative Responses	(N) Percentage <sup>1</sup>
Conference Characteristics		
Style / Size	people to drop in and listen or participate..."; "The session chair (not the discussant) made a point of criticizing the paper because it appeared too interested in the pragmatic and suggested that managers may have rationales for the way they react that are not motivated by pettiness or moral failure."	(20) 4.8%
Not excluded	"It is a big conference. If I attend an event where I don't already know people, it is usually difficult to connect with others..." "The meeting is too large to ever really feel included - except at Unit gatherings that are smaller." "When I first arrived it was very daunting. The Association seemed so monolithic that it was hard to know how to go about meeting people. Initially, there were so many sessions that you rarely saw the same people more than once."	(106) 25.6%
Miscellaneous	"No"; "None"; "Never"; "N/A"; "My [Unit] has been welcome"; "During the formal gathering, in my first ... meeting last year"; "I can't answer this question, cause I just joined in this year"	(19) 4.5%

Notes: <sup>1</sup> 'Percentage' is the number of responses for each category divided by the 414 participants who responded to this question. These percentages add up to a little over 100% because some of the 414 participants provided more than one reason for exclusion.

Of the respondents who did not feel excluded, most had not held office in the Association (90%) and identified as male (61.3%). No differences were evident between host country and non-host country residents, or between junior (e.g., Doctoral student, Assistant Professor, Lecturer, and Senior Lecturer) and more senior (e.g., Associate Professor and Professor) members. In fact, very few of the respondents identified 'rank' as being the basis of their experiences of exclusion, and sometimes rank was coupled with being new in the Association.

*As a doctoral student, when I didn't know very many people. But as I've gone to [the Association's conference] more, .... this problem has resolved itself. (Rank)*

#### 4.3.1. The role of human and social capital in exclusion

Table 2 shows that social capital (25.1%) is the most frequently cited reason for experiences of exclusion, followed by human capital (22.9%). Within social capital, Networks and Socials<sup>2</sup> are the main structural opportunities for member interaction in which respondents faced exclusion. The following quotes illustrate the role of these social capital categories:

*Each year, I feel excluded of most networking (and especially developmental) activities given my small & relatively junior set of acquaintances within [the Association] (Networks)*

*Attended a business meeting/social for [Unit] ... no one welcomed me into their conversations or sought any information about me or my interests. I felt like a leper – unrecognized and not wanted in the 'circle' (Socials).*

In addition, one of the most frequently mentioned experiences of

exclusion aligned with the human capital category of graduate degree/work institution. The following quote illustrates how human capital factors, such as an individual's current institution, may be perceived as not aligned with quintessential group member characteristics:

*Job market: not coming from [Association's country] top school means you do not have access to all job interview opportunities (Grad/Work Institution).*

In a few instances, respondents attributed exclusion to a combination of these two main categories of human and social capital, as seen in the following quote.

*I have had people walk away from me ... when they found out that I work at a small, not-well known, undergraduate-only school outside the [Association's country] (i.e. I had no networks or influence that made me worth talking to) (Grad/Work Institution; Networks).*

Responses such as these were split into parts and each part was coded in the appropriate categories (Zikic & Richardson, 2007). In addition to coding parts of the above two quotes in pertinent human and social capital categories, we coded the reference to country under demographics. Demographics and other personal reasons contributed to exclusion, as explained next.

#### 4.3.2. The role of other factors in exclusion

A few participants mentioned other factors that contributed to their experiences of exclusion at the Association, such as their demographic background, illustrated by this response:

*[I've] Never been invited to participate in the panels. / it is a gender and race thing...how many women lead? How many non-whites lead? (Gender / Race).*

Contrary to accounts for inclusion, very few of the respondents identified (lack of) involvement in the Association events or to volunteer as reasons for feeling excluded. Again, we treated this category as distinct from Human or Social Capital. This is because it is difficult to determine if the reported experiences of exclusion are due to member networks working as informal gatekeepers of opportunities to participate at the Association or due to the participants' personal reasons, such as not being able to attend the conference or a genuine lack of opportunities to participate in the Association. An example of Involvement responses is:

*[I felt excluded] When I wanted or actually signed up to be part of the committee for ethics evaluation, I was never contacted after the meeting (Involvement / Lack of volunteer opportunities).*

Finally, very few respondents listed factors pertaining to the Association's conference (e.g., conference size) as the basis of exclusion experiences. In fact, one participant explained,

*It's less exclusion from official [Association] activities, and more exclusion by...members. (Collegiality).*

To summarize, when asked to recall a specific experience of exclusion, participants ascribed these experiences to both social and human capital factors at a similar frequency, and more frequently than demographics or other factors. We therefore conclude that both types of capital are principal reasons for experiencing exclusion in the Association.

#### 4.4. Feeling included and excluded

For completeness, we conducted a round of within-person data analysis of experiences within the Association, taking in consideration the themes and codes already identified. We gleaned three additional insights from this analysis. First, the majority of respondents were able to describe episodes of both inclusion and exclusion within the

<sup>2</sup> 'Socials' are events formally organized by the Association or by its Units, or by individuals on behalf of their institutions.

Association, indicating their attentiveness toward these experiences. Second, experiences of feeling included or excluded in the Association occur as members have multiple loci of identification, and these identities are activated in different sub-communities. Third, when feeling excluded, individuals may deploy compensatory strategies to achieve a feeling of being included.

#### 4.4.1. Attentiveness toward feeling included and excluded

It is worth noting that a total of 371 participants responded to our open-ended critical incident approach which asked respondents to describe a specific experience of exclusion and inclusion. Of these, very few explicitly stated that they did not have any experience of either inclusion or of exclusion at the Association, implying they were perhaps inattentive to inclusion and exclusion experiences. In contrast, the majority of those who completed these open-ended questions were aware of both and described at least one experience of exclusion and one experience of inclusion, acknowledging attentiveness to both conditions. The remaining few respondents reported ‘Never’ on either inclusion or exclusion and provided details about at least one incident on the other, also showing an awareness of these issues. Given this pattern of results, we conclude that for the vast majority of study participants, these critical incidents of inclusion and exclusion were important to generate memorable episodes. In fact, most respondents were able to describe experiencing both inclusion and exclusion.

#### 4.4.2. Feeling included and excluded arising from multiple loci of identification

Interestingly, but perhaps not surprisingly, responses suggested that members may experience inclusion and/or exclusion depending on the context or sub-communities in which they interact with. Specifically, respondents expressed multiple identities at different levels<sup>3</sup> (Ashforth et al., 2008). For example, they referred to their alma-mater (group level) and their doctoral institution (organization level), their research interest (personal level) and their ‘unit’ (nested within organizational level), their rank (personal level; e.g., doctoral student vs. lecturer vs. full professor) and their status (group level).

*I felt most included when part of members of my [unit] (Networks; Identity: Unit member)*

*[Excluded] from invitations to some ... program panels and some social events ... because I'm not as much of a research star as they are ... (Networks; Identity: not star researcher)*

*[Excluded when] Discussing teaching as a primary duty of higher education (Teaching Scholar; Identity: Primarily a Teacher)*

#### 4.4.3. The compensatory dimension of feeling included and excluded.

To counteract exclusion, some respondents revealed that they engaged in ‘compensatory’ strategies. These strategies were varied. The most common were to volunteer as an active participant in the Association’s governance or to join smaller sub-communities within the Association allowing access to activities or events that tend to be much smaller in scale than whole-Association events.

*I think a key to inclusion at [Association] is to find a [sub-community] where your service is welcome and to get involved (Involvement) ... it is very difficult to network at the larger social events ... there were some smaller paper discussions where you were really able to meet the different authors and other people in the room. (Networks)*

All considering, our analyses suggest that perceptions of inclusion and exclusion are more complex than anticipated. Specifically,

individuals may not only recall these experiences distinctly, they also experience both inclusion and exclusion based on their multiple loci of identification, and some engage in multiple strategies to compensate for these experiences. The relationships suggested by our results are represented in Fig. 1.

## 5. Discussion

Our study utilized a rich investigative process to examine how and why experiences of inclusion and exclusion occur, even within organizations whose missions relate to advancing the interests of all individuals engaged in that profession. We conducted our study in a professional association, because professionals join associations to validate their human capital and build social capital (e.g., Stolle & Rochon, 1998). Based on social identity theory, we posited that members would experience inclusion due to similar human capital. However, we also believed that some members might engage in exclusionary behavior in order to protect the reputation of the association as well as their own social identity (e.g., Solebello et al., 2016).

Our research provides valuable insights into how members of the Association experience inclusion and exclusion. First, a large proportion of its members report incidents that are significant enough to contribute to their experiences of inclusion or exclusion. We found that few respondents (6.2%) explicitly stated that they did not have any experience of inclusion or exclusion at the Association. Further, a large majority (82%) reported at least one critical incident of *both* inclusion and exclusion. This result suggests that perceptions of inclusion and exclusion can be activated within the same association, perhaps arising from multiple loci of identification for individuals. This finding is important because it illustrates that inclusion and exclusion may exist on multiple levels, and not simply as a global perception pertaining to the organization. Another potential explanation is that inclusion and exclusion are independent, distinct constructs that need separate consideration in research and practice. This mirrors arguments made by Cropanzano et al. (2017) in their paper designed to clarify social exchange theory. Researchers should use a finer-grained approach to the study of these phenomena, recognizing the gradations of inclusion and exclusion related to multiple identities that may exist.

Second, the results did not exactly align with our expectations, and show that the relationships between human capital, social capital, inclusion and exclusion are more nuanced than anticipated (see Fig. 1). We expected that members would attribute inclusion experiences primarily to human capital factors, whereas exclusion would occur based on both human and social capital considerations. However, our analysis indicates that members associated inclusion with social capital but not human capital. This may be because once an individual has acquired the requisite human capital for joining a professional association, it contributes little to feelings of inclusion since the individual has already earned membership. Our analyses suggest that in situations where a ‘base’ or threshold level of human capital is attained (such as having a Ph.D.) the accumulation of social capital is likely tied to being perceived to have the ‘right’ type of human capital. It is this human capital qualifier that facilitates (or hinders) access to structural opportunities and social benefits afforded by the association. Therefore, lower perceived quality of human capital (e.g., holding a doctorate from a less prestigious institution) may limit members from fully participating (e.g., invited to symposia, run for office) and benefiting from the association’s expansive social networks. This in turn generates sub-communities and produces feelings of exclusion across association members. Our findings for exclusion were consistent with what we anticipated but perhaps contrary to the expected inclusionary climate in a professional association. Members who felt excluded attributed their experiences to both human capital (e.g., degree attainment, place of employment) and social capital factors (e.g., lack of access to networks). These results suggest that both human and social capital can have a ‘dark side’ that contributes to exclusion.

<sup>3</sup> We thank one of the reviewers for bringing this to our attention. The examples of multiple identities at different levels provided in the next sentence are from the same reviewer’s feedback.

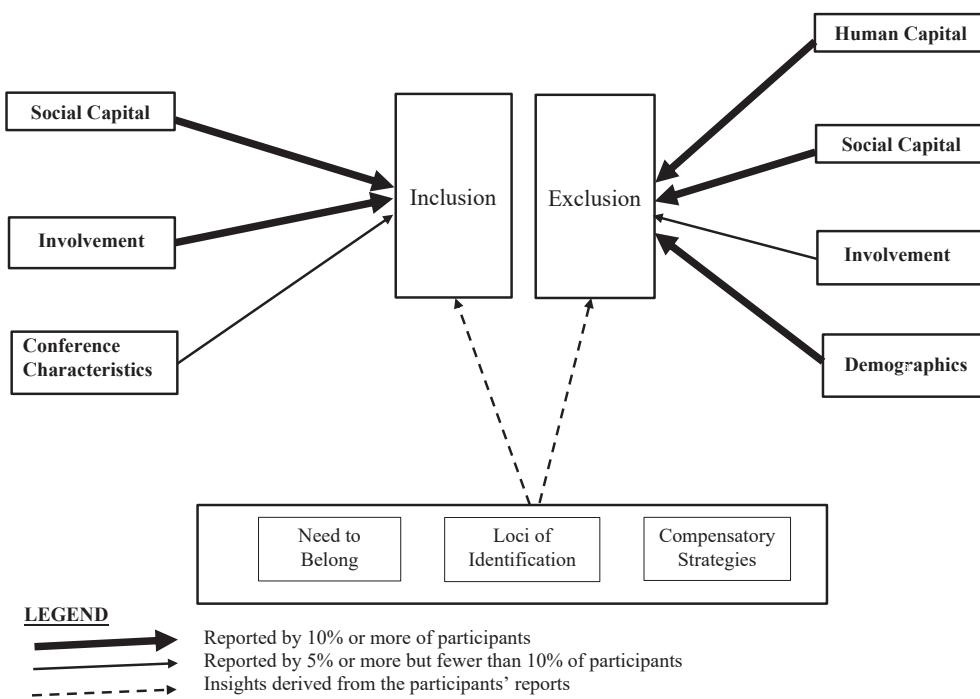


Fig. 1. Factors that Affect Inclusion and Exclusion.

Third, our results show that respondents distinguished between the Association and fellow members when considering inclusion and exclusion experiences. For example, fewer than 1 in 13 ([Table 1](#)) and fewer than 1 in 20 ([Table 2](#)) respondents listed factors pertaining to the Association itself as a reason for having experienced inclusion or exclusion, respectively. In fact, consistent with social identity theory arguments, respondents attributed exclusion primarily to the interpersonal interactions among members, demonstrated through social capital. This finding parallels the paradox found by [Solebello et al. \(2016\)](#) – their sample association was actively seeking to be more inclusive, but individual members acting separately resisted the changes the organization was trying to enact as an attempt to remain exclusive.

Finally, we found that our professional sample had a relatively low level of direct attribution for personal demographics for experiences of both inclusion and exclusion. Results for inclusion showed fewer than 1 in 100 of respondents ascribing inclusion experiences to demographics factors (0.7%; [Table 1](#)). Further, less than 1 in 8 (or 12.3%; [Table 2](#)) individuals described exclusionary experiences related to personal demographic characteristics like race, age, religion, and country of origin. These robust findings imply that in professional associations, differentiation in human and social capital plays a more significant role than demographics as conspicuous sources of inclusion and exclusion. Thus, our research indicates that it is important to go beyond typical exclusionary factors such as immutable or difficult to change demographic characteristics (e.g., age) to consider the impact of relational processes on feelings of inclusion and exclusion. However, it is necessary for us to acknowledge that demographic factors may have indirect impact on inclusion and exclusion through the mediating influences of human and social capital. Specifically, individuals' demographic profiles could influence others' perceptions of their human capital, as well as their access to social capital opportunities (e.g., [James, 2000](#)). Unfortunately, we cannot verify these possibilities in our sample but recommend they are tested in future research efforts.

Our study makes several valuable contributions to the literature on social identity and exclusion. In general, individuals join groups to develop their social identities and self-concepts (e.g., [Ashforth & Mael, 1989](#)), meaning that individuals at least partially construct their professional identities by joining professional associations, as long as they

have acquired the qualifying (i.e., prototypical) human capital. In our study, members of the Association provided us with valuable insight into how different members might relate to each other, and how seemingly innocuous relational processes among professionals (e.g., conference badges with institutional information) may not live up to the intent of the organization to facilitate career advancement. In fact, our study suggests that professional association members may actually enact barriers to career success for some members through exclusionary practices. The relational processes within professional associations determine the requisite norms, values, and qualifications (i.e., human capital) that are valued and rewarded. Acquiring the perceived 'right' kind of human capital can result in the accumulation of social capital, and members possessing desirable social capital will be rewarded with access to opportunities and a sense of belonging (i.e., feelings of inclusion). This inevitably leaves those without the 'right' human and social capital to feel excluded. In other words, relational processes within professional associations produce sub-communities and hierarchies that reinforce status differences among the association's members. Thus, social capital perpetuates inequality among members, which could have counterproductive effects on the Association achieving its mission. This elitism could occur through, for example, the prominence of a small group of members or of members from particular institutions in leadership positions.

Second, and perhaps more importantly, our study offers a noteworthy contribution by exploring how human and social capital can interlace to produce inclusion and exclusion, thus addressing the concerns expressed by [Nyberg and Wright \(2015\)](#) on the lack of attention to the relationship between human and social capital. Our theoretical rationale asserts that one's level of human capital is associated with the opportunity to attain social capital. When respondents were asked about their experiences of exclusion, human capital and social capital factors were referenced fairly evenly (22.9% and 25.1% respectively). However, specific comments from the subjects in our study suggest that members felt their qualifications (part of human capital) were not enough to break into highly desirable social networks (to build social capital) (e.g., "Social interactions are made up of cliques that are linked to age/rank, doctoral institution, and role at the [Association] (e.g. holding office)."; see [Table 1](#)). Such comments suggest that, while social

capital may actually be the mechanism for exclusion, some members blamed human capital factors as the origin of their exclusionary experiences. This supports the idea of social capital perhaps operating as an intervening influence between human capital and exclusion.

In contrast, when prompted to describe their experiences of *inclusion*, respondents were more likely to credit social capital and involvement (45.6% and 35.2%, respectively) instead of human capital (4%). This illustrates the complex nature of how individuals process experiences of inclusion and exclusion, as well as suggests that human capital and social capital may operate in unique ways to create these experiences. Specifically, members of the Association seemed to view networks and connections with other members, as well as Association-sponsored structural opportunities, as critically important to attaining inclusion. However, human capital attributes such as work institution or PhD-granting school prestige seemed to feature regularly in explanations of exclusion. One way to interpret these results is through a self-serving bias lens (Johns, 1999) – members who feel included explain it through their personal agency and hard work in building connections and networking, as well as participating in various Association activities, which we uncovered as compensatory actions. However, those who feel excluded believe they are prevented from inclusion by others (not from a lack of personal agency), because their qualifications or social capital do not measure up. Follow-up research is therefore needed to empirically investigate the complex relationship between social and human capital, and to distinguish the exact roles both play in inclusion and exclusion.

Building on arguments presented by McAllister et al. (2018), we believe there is a need to understand how social or relational processes may contribute to creating inequalities and exclusionary practices in the workplace. For example, demographic factors may be more important at the beginning of the employment relationship, when individuals rely on visible characteristics (such as race or gender) to assess others. As people get to know one another, demographic factors may become less relevant, and relational factors such as human and social capital may become more salient to experiences of exclusion, especially in professional settings like academia. As mentioned previously, another explanation is that demographics may directly impact the perceptions of others regarding human capital, as well as restrict members' access to social capital (e.g., James, 2000), resulting in an indirect effect on inclusion and exclusion. In our sample, respondents' infrequent attribution to demographic factors, such as age and gender, suggests that few members consciously recognized demographics as playing or having played a role in their professional success or struggles. Yet, we suspect that demographic-based exclusion might underlie some of our participants' comments as latent contributors of others' exclusionary behavior. For example, the quote 'At [Unit] social...people were in their own groups and not very welcoming for others to join in on their conversation. I just left.' (Table 2; 'Socials' category) might carry a concealed demographic-based reason for exclusion. Further, past research argues that individuals who are privileged and in the majority tend to be unaware of, and are reluctant to admit, how their demographic profile (i.e., dominant group status) helps them succeed (e.g., DiTomaso, 2015); this certainly could explain the negligible attributions (specifically 0.7%; Table 1) for how demographics impact inclusion in the Association. Future research should examine the actual role of demographics in the relationships among human, capital, social capital, inclusion and exclusion.

### 5.1. Implications

There are several implications of our findings for both research and practice. For researchers, it is important to take a broader approach to studying both how and why inclusion and exclusion occur in organizations. As our study suggests, professionals may be less likely to ascribe experiences of inclusion or exclusion to demographic factors when they interpret and imbue meaning to their own experiences (Cunliffe, 2011).

These are individuals high in human capital who successfully navigated gender, racial or other barriers to attain a PhD, so they are unlikely to claim exclusion due to sexism and racism. Nevertheless, the inability to form social capital may be partly rooted in such demographic factors. We hope our study will encourage research that examines a wide range of other factors, including demographic elements, to determine not only their relative contributions to experiences of inclusion and exclusion, but also the various ways that demographics may influence relational processes that may lead to inclusion and exclusion.

We also believe that researchers should explore a deeper and more complete conceptualization of inclusion and exclusion. In his work on social exchange, Cropanzano and colleagues (2017) express concern over an 'assumption of bipolarity' that assumes negative constructs are simply the absence of positive ones instead of conceptually independent, distinct phenomena. Treating inclusion and exclusion as separate experiences would allow for individuals to experience both inclusion and exclusion, or neither, in the same organization. The differential pattern of results (i.e., different attributions for inclusion and exclusion) in our research suggests a need to shift the current paradigm of thinking about inclusion and exclusion as diametrically opposed conditions of the same construct. Another related consideration is that individuals may vary in their need to belong (Baumeister & Leary, 1995), which implies that inclusion may not matter for some members and would have little impact on the attitudes and behaviors associated with their membership.

Although our study was conducted in an academic professional association, we believe that the results of our study have important implications for other types of organizations and professional fields. It is likely that the relational factors we uncovered influence an employee's experience of inclusion and exclusion in all types of organizations, especially in high human capital and professional fields such as law and medicine. Furthermore, perceptions of supervisory and co-worker support arising from the development of relational processes can contribute to a sense of belonging in groups (e.g., McNamara & Pitt-Catsopoulos, 2016). Both human capital and social capital operate in the workplace to benefit or restrict employees' access to key job assignments, promotions, and other opportunities (e.g., Metz & Tharenou, 2001). Therefore, it is imperative for researchers to investigate the specific ways that employees' human and social capital influence, or are influenced by, supervisors and coworkers, and the relative contribution to feelings of inclusion or exclusion that may result.

We also suggest future research examine the impact of human and social capital on organizational policies and processes such as fair treatment (e.g., Masterson et al., 2000), socialization, and developmental opportunities (e.g., Thomas & Anderson, 1998). These policies and processes can signal to employees that they are valued and appreciated, facilitating a feeling of inclusion (Shore et al., 2011) and of being an 'insider' (Stamper & Masterson, 2002). However, differential treatment by the organization, even under the guise of Affirmative Action policies (Konrad & Linehan, 1995) designed to help groups that have experienced past discrimination may signal that some employees are on the 'outside' or excluded from such organizational policies or processes. This perception of being treated differently, of being excluded, may result in dissatisfied employees, ultimately leading to turnover intentions (e.g., Chrobot-Mason & Aramovich, 2013). Investigating how human capital and social capital figure into these organizational-level processes and programs could aid inclusion practitioners in minimizing or eliminating exclusionary practices at work.

It is also instructive to replicate our tentative findings from the present study. Specifically, it will be useful to undertake quantitative investigations to confirm the associations found in our study (see Fig. 1), as well as document the link between human capital and social capital, and the potential intervening effects of social capital on the relationship between human capital and inclusion/exclusion. Additional value may be added through including demographic factors in the data collection, to examine potential differential effects due to race, gender, age, and other personal characteristics. Moreover, we recommend statistical

modeling to capture these key organizational inputs to determine their relative contribution to inclusion and exclusion practices.

There are several practical implications of our research. First, even though professional associations likely intend to create an inclusive community, internal relational processes can lead to divisions and hierarchies, and perpetuate inequality among the membership, which could in turn hamper the association's aim to further the profession and field (e.g., Solebello et al., 2016). The members in our study organization are professors and doctoral students who are engaged in both knowledge discovery (research) and knowledge dissemination (teaching). Some members are also engaged in professional practice of the field. Perceptions of exclusion could lead to poorer collaboration, communication of knowledge, and diffusion of discoveries made in the field (see Nadler & Halabi, 2006), which severely limits the professional association's ability to meet its aim and vision for the profession. It is therefore important for professional associations to acknowledge the different ways in which members acquire and apply their knowledge, skills and competence, and contribute to the advancement of the field and profession. Further, there needs to be awareness of how some members' desire to uphold traditional membership standards may lead to exclusionary behavior towards members who are perceived as not meeting those specifications. This desire may result in hierarchical membership structures, whereby there is an elite or 'insider' members' level, and an 'outsider' members' level composed of those who experience exclusion. Thus, associations could routinely survey their membership to assess their personal experiences of feeling included (or not) to ascertain if they need to implement programs to help members develop professionally (i.e., build human capital) and make connections with other members (i.e., build social capital).

Second, members who often or always feel excluded are likely to experience lower identification with the profession, and/or association. These members will likely have fewer and less meaningful interactions with other members, which also results in poorer engagement and even withdrawal behaviors (Ellemers et al., 1992). They may not see value in maintaining their membership due to an inability to construct or strengthen social and professional identities. Although all members have the requisite human capital for entry into the association, in reality, their credentials may not be equally respected based on the values and norms of some members of the association. Members with desirable human capital will work to maintain their access to opportunities and benefits. It is therefore important to validate various forms of human capital and not categorize some as superior through informal or formal organization practices.

In addition, our analyses indicate that involvement in the Association's operations is an important element of feeling included. Thus, organizations will likely benefit from providing opportunities for employees to participate and contribute to the organization in extra-role capacities. Past research has shown that employees who feel valued and supported are more likely to have higher levels of performance and commitment (e.g., Eisenberger et al., 1986).

## 5.2. Strengths and limitations

The strengths of our study are many, including a unique sample, a large number of participants, a new theoretical approach, and the consideration of both human and social capital in the experiences of inclusion and exclusion. An additional strength is the use of a qualitative data technique, which allows us to gather rich and useful data about the nature of the relationship between human and social capital in members' experiences of inclusion and exclusion. Further, the large sample provided an opportunity for low-level quantification (e.g., number and percentage) of our content analysis (Pratt, 2009). This quantification allows for a big picture understanding of the prevalence of various experiences of inclusion and exclusion (Denzin & Lincoln, 2008; Tharenou et al., 2007). In sum, the methodological approach used in this study, along with the sample size, permitted us to obtain an improved

understanding of how human and social capital relate to both inclusion and exclusion.

Our study also has limitations. Given the qualitative nature of our data, our results are suggestive of the proposed relationships and, therefore should be tested using quantitative methods in the future. Further, studying only one sample organization may limit the applicability of our findings. Despite the fact that generalizability is not the purpose of qualitative data analysis (Pratt, Kaplan, & Whittington, 2019; Roberson, 2006), we believe that the results are likely generalizable to other associations as well as organizations with high human capital, based on the theoretical argumentation provided in this paper. We suggest additional research to explore and verify these relationships in other professional organizations and contexts.

In addition, we note the small difference in the wording of the inclusion and exclusion questions. Specifically, one asks respondents to describe an 'event' associated with inclusion; the other asks respondents to describe the 'experiences' that made them feel excluded. Although the first part of both open-ended questions is identical, the word 'event' may have resulted in a response tendency toward describing events rather than unstructured occurrences that resulted in felt inclusion. Examples of unstructured occurrences would be descriptions of meeting someone at a coffee shop after a paper session or the fact that being well-prepared for one's paper presentation led to subsequent opportunities for engagement with interested people<sup>4</sup>. Thus, this one word difference between the two open-ended questions may have somewhat influenced the responses and, in turn, our findings. We recommend future researchers use identical wording in open-ended questions to avoid unintended varied respondent understandings of their meanings.

## 6. Conclusion

As participants from the New York Times' *New Rules Summit* concluded: "To make real progress with diversity and inclusion in the workplace, we have to consider the human experience" ([nytimes.com](https://www.nytimes.com), 2019). In this research, we have focused on the human experience in one professional association and have shown that, while human and social capital may contribute to inclusion, it is possible they also have a negative 'dark side' that may create exclusion among organizational members. One key implication is that this exclusion may impede or slow individual career success and prevent an organization from achieving its aims. Another is that most individuals are sensitive to inclusion and exclusion experiences. This heightened awareness can affect their perceptions of their association's value to, and concern for, their professional development. It is therefore necessary for professional organizations, such as our Association, to consider creative ways to counter exclusionary behaviors among their members and work toward greater inclusion. We hope this exploratory study will inspire further research leading to the minimization of exclusion in other types of organizations.

## CRediT authorship contribution statement

**Isabel Metz:** Conceptualization, Writing – original draft, Writing – review & editing, Formal analysis, Methodology, Data curation. **Christina L. Stamper:** Conceptualization, Writing – original draft, Writing – review & editing. **Eddy Ng:** Writing – review & editing, Data curation.

## Declaration of Competing Interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

<sup>4</sup> We thank one of the reviewers for bringing this potential limitation to our attention. The examples provided are from the same reviewer's feedback.

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