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THE STATE OF DIVERSITY, EQUITY & INCLUSION IN BUSINESS SCHOOL

CASE STUDIES

Center for Equity, Gender, and Leadership
University of California, Berkeley Haas School of Business

Executive Summary
MAY 2020

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University of California, Berkeley Haas School of Business

"Before business school, as part of Management Leadership for Tomorrow and the Consortium for Graduate Study in Management, I remember how inspired I was by the few business leaders that shared their success stories that I could identify with. It was powerful to hear a playbook from someone with a similar lived experience. During business school, as a student, that was non-existent in the classroom. From case studies to guest speakers, not one example that I was able to relate to."

- Rafael Sanchez, Haas MBA, Class of 2019

"Growing up as a gay, Chinese, immigrant kid in a predominantly white community, I have gotten used to feeling different than those around me. This difference has been reinforced over time and has affected my 'sense of self'. In my first job, I remember looking at all the senior leaders and realizing that they did not represent the diversity in me. I realized the same thing was happening in business school, where examples of success (for example, the people featured in case studies) were nothing like me. If we could all look at how we are portraying successful leaders and feature more diverse examples (which we know are out there), then the next generation of kids who feel different may have one more reason to feel like they fit in and can be successful.

- Alan Man, Haas MBA, Class of 2020

The situation

Case studies – using real life business situations or imagined business scenarios – are a key pedagogical tool for instruction within management education programs. The extent to which case studies are used varies among schools – Harvard leads the way with an estimated 80% of teaching in its MBA program delivered through case studies as of 2012.[1]

However, published case studies used in business schools primarily showcase white male protagonists[2] and often do not incorporate topics related to diversity, equity and inclusion (DEI) that are critical for businesses leaders to navigate. While there has been some effort to increase the number of case studies with diverse protagonists, this does not necessarily translate to higher use in classrooms. Professors often repeatedly use the same case studies each semester.

The lack of diverse protagonists reinforces a status quo in which traditional business leaders are primarily both male and white and unintentionally depicts leadership archetypes as traditionally masculine ones. Highlighting only one model of leadership can signal that women are not suited for leadership and deprives students of alternative role models.[3]

Even when cases have protagonists that are not white men, case studies often perpetuate harmful stereotypes and gender norms - such as women being depicted as more emotional, less visionary and less agentic than men.[4,5] In addition, among cases with female protagonists, credentials as proof of competency were mentioned more frequently as opposed to male leaders,[6] and cases with female protagonists tend to be in "pink-collar occupations".[7] Other stereotypes and implicit biases are reinforced in cases related to race, national origin and age as well.[8]

"Throughout my MBA, I have read over 500 cases about the business dilemmas of straight white men… How am I supposed to imagine the world as it could be if I am only allowed to learn from what the world has always been? Reading a case about a leader who I identified with, would give me confidence and validation - even though I am not named John, I have a lived experience worth sharing and a leadership style that can add value to my organization."

- Francesca LeBaron, Haas MBA, Class of 2019

Why it matters & action taken

There is significant educational value for students (undergraduate and graduate) exposed to cases with diverse protagonists and/or on DEI topics. Students who are exposed to diverse business leaders benefit from a role model effect; students who can relate to diverse leaders enjoy better self-perceptions and feel more confident,[9] as well as perform better.[10]

Integrating case studies related to diversity, equity and inclusion can: (1) foster cultural sensitivity among students[11]; (2) equip students to manage real-life scenarios in which varying perspectives and lived experiences are at play; (3) prepare students for increasingly diverse workplaces where DEI is a strategic advantage; and (4) engage students in critical and timely discussions while offering them strategies to promote equity and inclusion throughout the business.

Recognizing this gap and importance of diversity, equity and inclusion in business school education, the Center for Equity, Gender, and Leadership (EGAL) at the UC Berkeley Haas School of Business created a Case Compendium with two sections: (a) case studies with diverse protagonists, and (b) case studies that build "equity fluency" by focusing on DEI-related issues and opportunities. The compendium, at the time of this writing, includes 215 cases for diverse protagonists, and 215 cases on DEI-related topics. We will continue to be updated over time.

The goal of the compendium is to support professors at Haas, and business schools globally, to identify cases they can use, and ultimately, to advancing DEI in education and the business world. Cases were collected from 20+ leading publishers using search terms and relying on platform algorithms to identify cases in order of relevance and popularity.

This brief outlines trends among case studies collected and gaps, while offering recommendations for case study writers / faculty, business schools and case study publishers. We end with commitments from EGAL to address existing gaps.

Our collection and analysis of cases revealed the following findings:

Identities of Focus

- *There is a lack of cases with protagonists that are not white men.* Of the approximately 19,000 cases on Harvard Business Publishing (HBP) Education cases[12] (which comprise ~80% of cases used in business schools globally), it is difficult to make exact estimates on the diversity of protagonists, but we do find some indications. Approximately 1.3% of cases on HBP appear in searches for "African American" or "Black". When searching terms there, we found 1,826 cases (or 9.45% of total cases) appearing for "woman", "gender" and "she".

- *The majority of cases catalogued with diverse protagonists focus on white women.* Out of 215 cases, 83.72% portray a protagonist representing gender diversity (largely white, cis female protagonists) and 28.84% highlight a protagonist representing race / ethnic diversity (i.e., under-represented minority (URM)). Several cases have a protagonist that is both female and a URM (18.60%).

- *The majority of DEI cases catalogued also focus only on gender.* The most common identity of focus in DEI-related cases is gender (40.93% of 215 cases) followed by race / ethnicity (20%). Few cases (6.05%) focused on DEI-related issues and opportunities for both race and gender. Many DEI-related cases did not specify particular identity/ies of focus (30.23%).

- *Identities beyond gender (particularly cis female) and/or race / ethnicity are lacking, with some identities rarely seen.* In the DEI-related case studies, only 2.33% include discussions focused on diversity of abilities and immigrant / first-generation, and socio-economic diversity. Only 1.40% of the case studies focus on identity/ies related to asylee and refugee diversity. None of the cases include veterans as an identity of focus.

83.72% **28.84%** **40.93%** **6.05%**
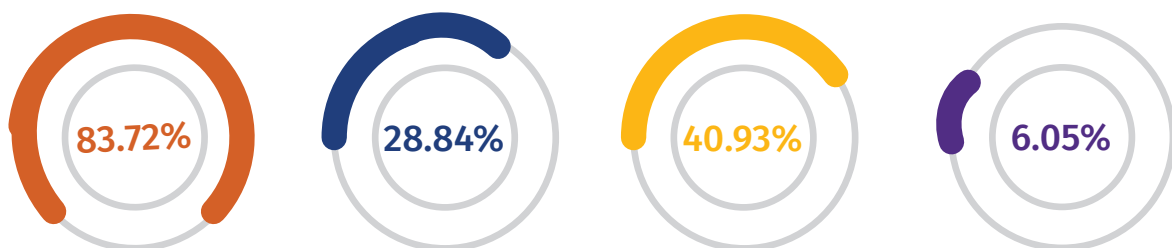
- Diverse protagonists graphic 1: 83.72% portray a protagonist representing gender diversity (largely white, cis female protagonists).
- Diverse protagonists graphic 2: 28.84% highlight a protagonist representing race / ethnic diversity (i.e., under-represented minority (URM)).

- DEI-related topics graphic 1: The most common identity of focus is gender (40.93% of 215 cases).
- DEI-related topics graphic 2: Few cases (6.05%) focused on DEI-related issues and opportunities for both race and gender.

Target Segment

In the DEI-related cases, most focus on entry and mid-level employees in the Workplace (54.88%) followed by Corporate Board / Leadership (15.35%), Marketplace (10.23%), and then General Population (7.91%). There is a lack of cases on DEI topics in Supply Chain (1.40%) or among Investors (0.93%).

Disciplines and Topics

- *DEI-related cases are predominantly in Human Resource (HR) Management / Organizational Behavior with a focus on culture and employee representation gaps/ solutions.* Among DEI-related cases, the majority were in HR Management / Organizational Behavior (58.60%), followed by General Management (11.16%). The most common topics are Culture (34.88%) followed by Diverse Employee Representation Gaps / Solutions (21.40%).

- *Cases with diverse protagonists are also mostly in HR Management / Organizational Behavior – particularly if they have female protagonists.* HR Management / Organizational Behavior is by far the most common discipline (40% of the 215 cases, or 86 cases). Of these HR / Organizational Behavior cases, the vast majority (90%) have female protagonists. While women do disproportionately fill HR-related roles as opposed to other technical or P&L positions, this trend perpetuates a harmful, limited narrative based on gendered stereotypes. The second most common discipline is Entrepreneurship (25.58%). Most of the entrepreneurship cases focus on small-sized businesses and are in social service related industries, as well as retail and finance.

- *Various disciplines are almost non-existent among both case study groups.* Each group lacked cases in the discipline of Leadership (only 1.40% in diverse protagonists cases and 1.86% in DEI-related cases). There are also few cases across both case study groups in Supply Chain, Political Economy, Economics, International Business and Negotiation. There were some in Marketing with 8.37% of diverse protagonist cases in Marketing, and 6.05% among DEI cases.

Target Segment

*The top industry among both case study groups is Financial Service*s (21.40% of DEI-related cases, 21.86% of diverse protagonists). The second most common industry among both groups is Information (14.88% of DEI-related cases, 16.74% of diverse protagonist cases).

Perpetuation of Stereotypes

Several case studies reinforce harmful stereotypes and gender norms. This highlights a larger indication of biases of the authors. We highlight three examples:

- In "Director's Dilemma: Balancing Between Quality and Diversity" (2017), the title of the case, as well as the description, implies that more diversity equals less quality, perpetuating the common misguided narrative of diversity in sacrifice of "quality".

- In "Carmichael Roberts: To Create a Private Equity Firm?" (2017), the authors described the protagonist as a "rare African-American venture capitalist". The authors' selection of the word rare could unintentionally commodify the protagonist.

- In "Organizational Behavior: Management Diversity in the Large Corporation" (1993), the description says: "How do you manage talented people that are different from the typical corporate profile like women, blacks, Asians, Hispanics and others?" The case presents individuals as 'atypical' / as 'others' requiring different management approaches.

Authors

The majority of the primary authors (first listed) are male. Of the DEI-related cases, 55.35% of the primary authors are male, and of the diverse protagonist case studies, 67.91% are male.

46.51%

Of the DEI-related case studies, the majority that specify a geography occur in the US
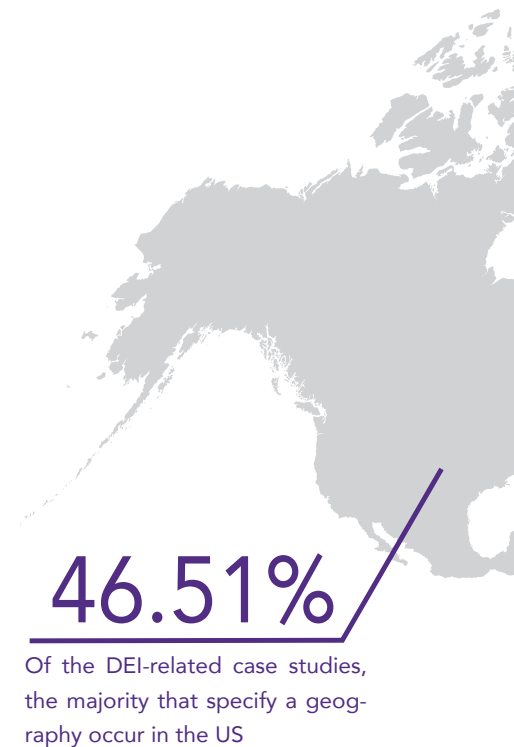
Geography

Cases are US-centric, although publications from which they were sourced feed cases to business schools globally. For both the diverse protagonist cases and DEI-related cases, the vast majority of cases that specify a geography occur in the US. Among diverse protagonists, the second most common country where a geography is specified is Switzerland, but there are very few cases.

66.05% Of cases with diverse protagonistst took place in the United States

2.33% Of diverse protagonist cases took place in Switzerland

Based on the analysis, we outline recommendations for case study authors and faculty, business schools and case study publishers:

For case study authors & faculty

1. Explore using cases with diverse protagonists and on DEI topics. Use EGAL's Case Compendium to identify cases. We have created a survey tool for any faculty member (at Haas and beyond) to find cases appropriate for their particular context. We review this survey monthly and respond to faculty needs and requests.

2. Consider writing and publishing more case studies with diverse protagonists – particularly intersectional identities and for use in courses in the core curriculum.
Consider writing and publishing on topics of DEI outside of Human Resource Management / Organizational Behavior-- and particularly across core curriculum courses.

3. Ensure case study language used in the case and in the class discussion does not commodify / discriminate against certain identities, and/or perpetuate stereotypes and harmful norms.

4. Engage with centers such as EGAL to write case studies or support research in case study development.

For business schools

1. Encourage and incentivize faculty to utilize case studies with diverse protagonists or case studies on DEI topics-- assuming the case(s) align with the course and their teaching goals.

2. Support centers such as EGAL to write case studies that fill key gaps, and inform faculty of case study options.

3. Educate case study authors / faculty on topics of power, privilege, discrimination, bias and structural inequities and how they can manifest in their classroom discussions.

4. Provide faculty and lecturers resources and educational opportunities to integrate DEI in the classroom. A barrier for faculty to use cases with diverse protagonists or on DEI-related topics is a lack of comfort on sensitive topics of diversity. For example, how can faculty facilitate tough conversations around identity when challenges are brought up from students?

For case study publishers

1. Review case study applications and descriptions for language that reinforces stereotypes and harmful norms, and challenge the authors to consider changes.

2. Incentivize the writing of new case studies with diverse protagonists and on DEI topics. In particular, case studies written on DEI-related topics outside of the workplace and HR, and sowing diverse protagonists who represent intersectionality. For cases with female protagonists, encourage case studies outside of "pink" industries and domains.

3. Encourage much greater diversity of case study authors.

EGAL's commitment

EGAL is dedicated to advancing equity fluency among students and business leaders. As part of this mission, based on this analysis and with support from the school, EGAL will work to fill critical gaps. In particular:

• Write case studies with diverse protagonists, particularly those representing intersectional identities and in industries/disciplines outside of HR and organizational management.

• Write case studies on DEI-related topics relevant to core courses, particularly where they are missing. As possible, we will prioritize diverse protagonists representing intersectionality.

• Support faculty in writing / researching new cases (particularly for the above criteria), as well as in finding relevant cases for use in their classrooms. The compendium is meant to fill this gap, as well as the survey tool requesting specific support. We will continue to update the compendium.

• Work with the dean's office and D&I team at Haas to help publicize this large body of work and valuable set of resources. We offer to partner with the D&I team to provide training for faculty and lecturers to effectively integrate cases in their courses.

It is critical the education system responds to the needs of its students and to present-day business needs, as well as to society's challenges more broadly. We show both a gap and an opportunity for business school case studies as a critical tool for change. Advancing equity fluency among current and future business leaders is critical for sustainable and successful businesses in an increasingly interconnected world.
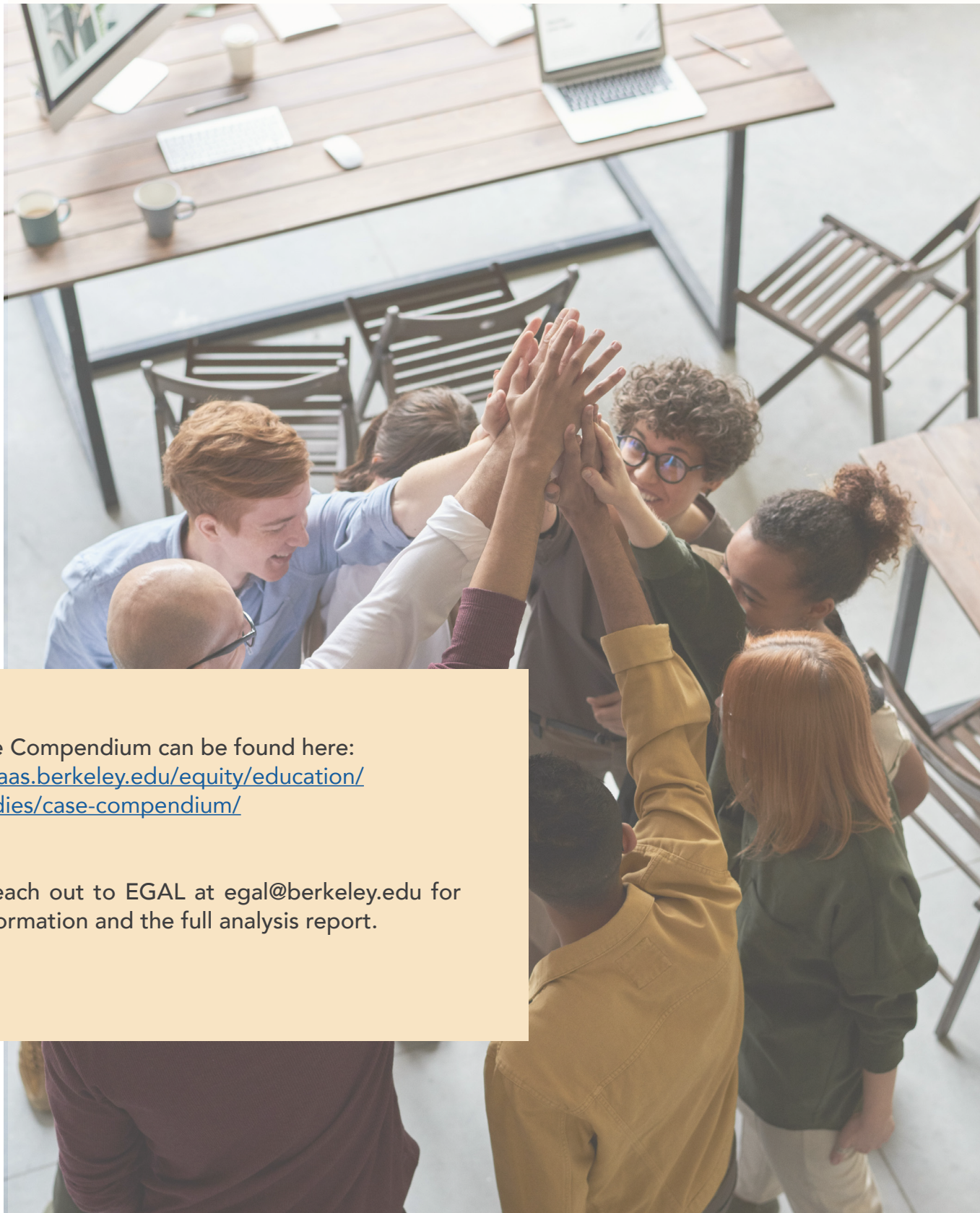
The Case Compendium can be found here:
https://haas.berkeley.edu/equity/education/
case-studies/case-compendium/

Please reach out to EGAL at egal@berkeley.edu for
more information and the full analysis report.

Endnotes

1. Byrne, J. (2012). How the world's top business schools teach their students. Poets & Quants. Retrieved from https://poetsandquants.com/2012/11/18/how-the-worlds-top-business-schools-teach-their-mbas/.

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7. According to Merriam-Webster, "pink-collar" constitutes "a class of employees in occupations traditionally held by women." This may include jobs in social work, education, or child care.

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12. This estimate was identified on May 5, 2020 through the "main case" search function on Harvard Business Publishing (https://hbsp.harvard.edu/search?N=4294930433&&Nrpp=25&action=refined).

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