



Westcliff International
Journal of Applied Research

WIJAR



Volume 6

Issue 1

Fall 2022

WIJAR

DECEMBER 2022

ISSN 2572-7176

wjournal@westcliff.edu

Westcliff International **Journal of Applied Research**

Volume 6 - Issue 1 - Fall 2022

OPEN-ACCESS • MULTIDISCIPLINARY

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ABOUT WIJAR

Westcliff International Journal of Applied Research (WIJAR) is a multidisciplinary, double-blind peer-reviewed, open access journal pioneered by the faculty at Westcliff University. The journal was founded in 2017 and provides an opportunity for students, academics, and industry professionals to publish innovative research that offers insight into practical implementation. In order to widely disseminate new knowledge and scholarship, WIJAR advocates for all submissions to be written in a style that is accessible/available to a broad audience or readership, including those readers who may not be familiar with either research or the topic studied. The journal aligns with Westcliff University's mission to educate, inspire, and empower individuals through its dedication to supporting authors in the review and revision process to produce the highest quality content possible.

Distinguishing this journal from others similar is the strong support offered to contributors, especially first-time authors who may need additional writing or structural assistance. All contributors have access to the Westcliff University Online Writing Center where dedicated research/writing specialists are able to offer support and suggestions.

LETTER FROM THE EDITOR-IN-CHIEF

As Editor-in-Chief for the Westcliff International Journal of Applied Research, I am consistently inspired by the individuals I work alongside, the authors who put so much intention and dedication into their work, and the way in which the academic community as a whole perpetually strives to find new connections and ways of contributing to growth and change. I would humbly like to thank Dr. Evelín Suij-Ojeda and Dr. Mary Broding, Associate Editors, for their commitment to our journal and its success. This journal, and the development and growth of it, is truly a team effort. I would like to thank Bradley Holder for his work in editing and formatting this volume. It was through his work and collaboration this publication was made possible.

As this is my last year holding the position of Editor-in-Chief of WIJAR, I would like to extend my gratitude for all who have contributed to the progression of our journal over the years. It has been a true pleasure.

On behalf of the WIJAR editorial board, we hope that you enjoy this issue. We are grateful for the contribution that each of the authors has made to the field of academia and are proud to publish their work. May these contributions inspire depth of thought and consideration of publication in future WIJAR issues.

Christa L. Bixby

Editor-in-Chief

ACKNOWLEDGEMENTS

The publication of Westcliff International Journal of Applied Research cannot happen without the contribution of many dedicated individuals. On behalf of the journal, we would like to thank:

Dr. Anthony Lee for his perpetual support of the journal and belief in the value it possesses for Westcliff University and the wider field of academia.

The WIJAR editorial board, internal review board, and external review board members. Each member has been dedicated to engaging in the process of review to evaluate and select quality research articles.

The Westcliff University Marketing Department for their contributions to the development of the journal's website, marketing of information regarding the journal, and overall involvement in the success of this publication.

Bradley Holder for his work in formatting and editing the publication.

The Westcliff University Writing Center, for their collaboration and support of each author in the process of review and revisions.

Last, but definitely not least, each of the authors who have put in the time and effort to contribute their ideas and insights in this publication. We are honored to share your work.

DEDICATION

The Fall 2022, Volume 6, Issue 1 publication of the Westcliff International Journal of Applied Research is dedicated to Dr. Kaveh Shamsa, a man who was perpetually inspired by research and inspired this love in his students. May this publication be an honor to your memory.

Influence of All Sexual Orientations and Gender Identity upon Work Authenticity through Satisfaction with Supervisor

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ABSTRACT

The ability for workers to be authentic in the workplace benefits individuals and organizations alike. However, empirical studies examining the influences of employees' satisfaction with a supervisor and authenticity are limited, especially for employees with identities such as LGBTQIA. Therefore, this exploratory study aimed to investigate state-based versus trait-based perceived work authenticity, satisfaction with a supervisor, and the influence of sexual orientation and gender identity within one Fortune 50 company in the United States. In addition, differences in perceived authenticity and satisfaction with a supervisor were assessed by dividing participants into two groups—one as LGBTQIA and the second as cisgender and heterosexual. Quantitative data was collected with a cross-sectional online survey assessing work authenticity, satisfaction with one's supervisor, and demographic questions. The analysis and empirical tests included descriptive statistics, Pearson correlation, independent t-tests, and general linear models. Findings from this research study indicated that authenticity correlates to satisfaction with one's supervisor, and workers who identify as LGBTQIA report lower levels of authenticity, especially in self-alienation. Recommendations are provided regarding future research and improved organizational and human resource management practices for an authentic workforce or diversity and inclusion.

Keywords: authenticity, work authenticity, well-being, Independent Authenticity Measure at Work, self-determination theory, Satisfaction with My Supervisor Scale, human resource practices, sexual orientation, gender identity, LGBTQIA, silent identity, workplace identity, diversity, inclusion

Influence of All Sexual Orientations and Gender Identity upon Work Authenticity through Satisfaction with Supervisor

Authenticity is being oneself and is affiliated with well-being (Chen, 2019; Fletcher & Everly, 2021; Sutton, 2020). The outcomes and benefits of personal authenticity have been well-documented by much-quoted researchers over the last two decades (e.g., Emmerich & Rigotti, 2017). The culmination of empirical studies and scholarly literature has resulted in authenticity's widely noted benefits and outcomes (Emmerich & Rigotti, 2017; Gardner & Prasad, 2022). Benefits of authenticity in the workplace include an increase in workers' subjective well-being, positive affect, productivity, and organizational effectiveness; and less burnout, stress, negative affect, and symptoms of physical illness (Emmerich & Rigotti, 2017; Ménard & Brunet, 2011; Metin et al., 2016; Reis et al., 2017; Schmader & Sedikides, 2018; van den Bosch & Taris, 2014; Zhang et al., 2019). Beyond the benefits to the individual, the benefits of authenticity in the workplace for organizations may include attracting top talent, advancing competitive advantage, and enhancing sustainability in today's fast-paced global marketplace (Lambert, 2016; Longarino, 2019; Pichler et al., 2017).

For LGBTQIA workers, who often feel like they cannot be their authentic selves in the workplace (Gardner & Prasad, 2022), a supportive environment may parallel the benefits of authenticity for most workers who identify as heterosexual and cisgender. Individuals who are cisgender identify with their assigned sex at birth (Ng & Rumens, 2017). Benefits of a supportive authentic environment for LGBTQIA may include a decreased need to conceal one's sexual orientation or gender identity, which in turn may lead to lower stress, lower symptoms of depression, and greater well-being (Fletcher & Everly, 2021; Webster et al., 2018). Supportive workplace policies backed up by the United States (U.S.) anti-discrimination laws have been found to spur innovation (Hossain et al., 2020), increase job satisfaction, provide better career experiences, and increase support and treatment by heterosexual coworkers (Ng & Rumens, 2017). Supportive workplace policies may decrease litigation due to illegal discrimination and communicate that the organization supports diversity and inclusion to its future employees, customers, and external stakeholders. (Burn, 2018; Valenti, 2021).

Supportive workplace policies may signal increased safety, thereby improving the performance of LGBTQIA workers (Fletcher & Everly, 2021; Wright et al., 2006). Furthermore, a supportive climate has been shown to help an organization retain LGBTQIA employees (Webster et al., 2018). A 2018 survey poll found that one in four LGBTQIA employees stayed at an organization that was supportive of a minority group (Fidas & Cooper, 2018).

Research by Pichler et al. (2017) and Lambert (2016) found that diversity improved firms' financial performance and stock market reactions. A diverse workforce could meet the needs of a diverse customer base. Longarino (2019) reported from a 2019 Out Leadership's Out to Succeed study that 60% of LGBTQIA employees who disclosed their status increased their job abilities and engagement with customers. Given the many benefits of embracing LGBTQIA diversity and workplace talent, companies refusing to do so are "shooting themselves in the foot" (Longarino, 2019, p. 512).

Organizations directly influence workers' experiences through the workers' supervisors. A supervisor's influence on the worker's ability to be authentic or one's best self at work is supported by research on the general population (Ma et al., 2020) and LGBTQIA workers (Fidas & Cooper, 2018; Gacilo et al., 2018; Hossain et al., 2020; Pichler et al., 2017; Schneider et al., 2017). In addition, the supervisor's style is essential in predicting turnover, work quality, satisfaction, and job retention since "it is often said that people don't leave jobs, they leave their bosses" (Ryan & Deci, 2019, pp. 40-41).

Literature Review: Previous Studies and Need for Further Studies

Initial research on personal authenticity viewed authenticity as a dispositional, trait-based, and fixed characteristic (Gan et al., 2018). Then, researchers adopted a broader approach that an individual's behavior may change based on different influences, social roles, or situational contexts (van den Bosch & Taris, 2014). Knowledge of workplace authenticity was advanced when the Individual Authenticity Measure at Work (IAM Work) was created (van den Bosch & Taris, 2014, 2018). Researchers have since expressed a need for more focused studies on authenticity antecedents (Gan et al., 2018) and external influences (Didonato & Krueger, 2010; Sedikides et al., 2019). Supervisor support was one

external antecedent ubiquitous in organizations and was positively related to worker authenticity (Ma et al., 2020). Researchers also identified a need to investigate authenticity within the work environment and among different workers (Metin et al., 2016; Sedikides et al., 2019; Wood et al., 2008). Wood et al. (2008) specifically documented the need for further scholarly research on groups whose identity is not clear or known, “such as Jewish people, lesbian, gay, bisexual, and [transgender] people, and people with unseen disabilities, such as epilepsy” (p. 397).

LGBTQIA workers are one such group that represents a silent or unknown identity. The initialism LGBTQIA represents individuals identifying as lesbian, gay, genderqueer, bisexual, transgender, queer, intersexual, and asexual (Dawson, 2018). Gallup poll results of individuals in the United States in 2021 estimated the number of lesbian, gay, genderqueer, bisexual, transgender, and queer (LGBTQ) adults to be 7.1% (Jones, 2022).

Gallup reports that the number is likely underreported due to fear of threat or discrimination (Jones, 2021). Anti-discrimination laws and protections are neither available nor uniform nor amended in the U.S. Constitution (Valenti, 2021; Webster et al., 2018). LGBTQIA workers who publicly self-identify can face adverse outcomes, discrimination, hostility, and negative attitudes (Eliason et al., 2018; Gardner & Prasad, 2022; Hossain et al., 2020; Longarino, 2019). As a result, in 2018, 46% of LGBTQIA workers did not disclose their orientation at work (Fidas & Cooper, 2018). Bonaventura and Biondo (2016) discovered that discrimination and adverse attitudes negatively impact worker performance, such as higher absenteeism and lower productivity (Hossain et al., 2020).

Based on the literature and the need for further studies, the research questions and hypothesis formulated were:

RQ1: Is there a significant difference in work authenticity between workers who identify as LGBTQIA or cisgender and heterosexual workers?

Ha1: LGBTQIA individuals will score lower on the IAM Work than cisgender and heterosexual workers.

H01: There will be no difference in scores on the IAM Work between people who identify as LGBTQIA and cisgender and heterosexual individuals.

RQ2: Is there a significant relationship between perceived work authenticity and satisfaction with a supervisor?

Ha2: Individuals who indicate high levels of satisfaction with a supervisor will also indicate high levels of work authenticity.

H02: There will be no relationship between levels of satisfaction with a supervisor and levels of work authenticity.

RQ3: Is there a significant interaction between satisfaction with a supervisor and the identification as LGBTQIA or heterosexual and cisgender on work authenticity?

Ha3: LGBTQIA individuals will have lower scores on the IAM Work and satisfaction with a supervisor than cisgender and heterosexual workers.

H03: There will be no difference in scores on the IAM Work and satisfaction with a supervisor between people who identify as LGBTQIA and cisgender and heterosexual individuals.

Research Method Design

The exploratory, quantitative, cross-sectional descriptive study aimed to investigate whether sexual orientation and gender identity influence state-based perceived work authenticity and satisfaction with a supervisor.

Authenticity, the dependent variable (DV), was defined and measured with three components: authentic living, self-alienation, and external influence using the twelve-question IAM Work created by van den Bosch and Taris (2014). Answers to the statements in the IAM Work (e.g., At work, I feel alienated) were captured on a 7-Point-Likert scale (1 does not describe me at all, 7 describes me very well). The first independent variable (IV), satisfaction with a supervisor, was measured with the Satisfaction with My Supervisor Scale (SWMSS). The SWMSS is an 18-question instrument that Scarpello and Vandenberg (1987) developed to obtain subordinate satisfaction and job performance through technical, human relations, and administrative skills. An example statement is the way my supervisor helps me to get the job done. Answers were captured on a 5-Point-Likert scale with an anchor at each point (1 very dissatisfied, 2 dissatisfied, 3 neither satisfied or dissatisfied, 4 satisfied, and 5 very satisfied). The instructions guided participants to focus on their current work manager and imagine how the statements applied for the past four weeks. Both instruments collected interval data with Likert-

type scales. The second IV was sexual orientation and gender identity (SO&GI). The SO&GI variable was captured in the demographical questions as nominal data. For the statistical analysis, the SO&GI variable responses were later binned into two groups, LGBTQIA or heterosexual and cisgender. The conceptual model was based upon the theoretical framework of self-determination theory (SDT). SDT, created by Ryan and Deci (2000, 2017, 2020), factors in both internal and external influences into an individual's "innate growth tendencies and basic psychological needs, and focuses on the degree to which individual behavior is autonomously motivated or controlled" (Slomp et al., 2018, p. 707). SDT is an inherent property of behaviors driven by self-determined motivation and authenticity (Ryan & Deci, 2000; van den Bosch & Taris, 2018). Multiple studies examining authenticity, leader influence, autonomy, and well-being are based on SDT. The concepts of SDT have also been found to support the known intrinsic and extrinsic elements influencing the antecedents and outcomes of LGBTQIA workers in supportive or hostile environments.

Questionnaire & Data Collection

The questionnaire included four qualifying closed-ended questions asking the participant about their age, whether they are a worker with a supervisor, and whether they live and work in the U.S. Work authenticity was measured through 12 closed-ended questions in the IAM Work, such as I behave in accordance with my values and beliefs in the workplace. Satisfaction with a supervisor was measured through 18 closed-ended questions in the SWMSS, such as the way my supervisor is consistent in their behavior toward subordinates. Ten demographic closed-ended questions captured data such as age, ethnicity, sexual orientation, and gender identity.

The target population was employees at one large Fortune 50 organization with a national U.S. footprint. As the organization had international subsidiary locations, participants were limited to those who lived and worked predominately in the U.S. The workers represented roles across all organizational levels, regional locations, and diverse cultural backgrounds.

The host organization agreed to participant recruitment and supplied the secure Qualtrics platform for the online questionnaire. Participant recruitment occurred through the intranet site and the Employee Resource Groups (ERG; McNulty et al., 2018). One ERG was specific to LGBTQIA workers. Resource groups are created explicitly for minority members and allies to give a voice to workers (McNulty et al., 2018). In the case of LGBTQIA groups, members who join have publicly self-identified (McNulty et al., 2018). Therefore, ERG members at the host organization were asked to complete the survey and forward it to others. The recruitment represented the non-probability sampling technique of purposive (e.g., target all employees) and snowball (e.g., refer others to the survey; Naderifar et al., 2017; Wang & Cheng, 2020). Snowball sampling helps find participants who are not easily accessible, such as LGBTQIA workers not in the ERG, by asking participants within a target population to recruit others (Naderifar et al., 2017).

The anonymous subject responses were collected between November 17 to December 17, 2021. The desired sample size was 362. Out of the total responses ($n = 485$), the final data set included 413 fully consented, completed, and submitted surveys.

Results

The data was analyzed using IBM SPSS Statistics Standard version 27.0 software. The section concludes with a summary of the high-level results.

Descriptive Statistics: Demographic Data

The demographical data demonstrated that the majority of participants were employees without direct reports known as individual contributors ($n = 342$, 82.8%), between the ages of 35 to 64 years ($n = 338$, 81.9%), were white (82.1%, $n = 339$), and had a 4-year or professional degree (68%, $n = 281$). Participants lived and worked across the U.S., with nearly half living (46.7%, $n = 193$) and working (52.3%, $n = 216$) in the Midwest. Approximately 23% ($n = 93$) of participants identified as LGBTQIA, and 77% ($n = 320$) as heterosexual and cisgender. See Table 1 for a summary of the demographic variables.

Table 1*Summary of Demographic Variables*

		Count	Column N %
Role	Individual Contributor	342	82.8%
	Manager, Director, or above with direct reports	71	17.2%
Age	Under 18	0	0.0%
	18 - 24	5	1.2%
	25 - 34	50	12.1%
	35 - 44	93	22.5%
	45 - 54	120	29.1%
	55 - 64	125	30.3%
	65 - 74	20	4.8%
Ethnicity	White	339	82.1%
	Black or African American	49	11.9%
	American Indian or Alaska Native	5	1.2%
	Asian	9	2.2%
	Native Hawaiian or Pacific Islander	2	0.5%
	Other ethnicities	22	5.3%
Highest education	Less than high school	0	0.0%
	High school graduate	21	5.1%
	Some college	61	14.8%
	2-year degree	40	9.7%
	4-year degree	138	33.4%
	Professional Degree	143	34.6%
	Doctorate	10	2.4%
Live	New England	22	5.3%
	Mid Atlantic	81	19.6%
	MidWest	193	46.7%
	Southwest	16	3.9%
	West	47	11.4%
	South	57	13.8%
Work	New England	52	12.6%
	MidAtlantic	111	26.9%
	South	75	18.2%
	MidWest	216	52.3%
	Southwest	39	9.4%
	West	83	20.1%
	Outside the US	4	1.0%
Group	LGBTQIA	93	22.5%
	Heterosexual and Cisgender	320	77.5%

All respondents were asked to choose at least one response from each category but were allowed to choose all options that applied. A majority of the participants were identified as heterosexual females (n = 257), followed by heterosexual males (n = 58), gay males (n = 25),

lesbian females (n = 24), and bisexual females (n = 23). For gender frequency, respondents identified as male (n = 87), female (n = 314), non-binary or third gender (n = 8). From both the sexual orientation and gender identity demographic options, no subject just selected

cisgender as a standalone gender characteristic; therefore, each subject (n=413) was attributable to the groups of LGBTQIA or heterosexual and

cisgender. Additional detail about sexual orientation and gender are shown in Table 2.

Table 2

Sexual Orientation and Gender Crosstabulation

		Gender								Total
Sexual Orientation			Male	Female	Non-binary or Third Gender	Trans-gender	Gender-queer	Cis-gender	Other	Prefer not to say
Heterosexual	<i>n</i>	58	257	0	0	0	26	0	0	341
	<i>%</i>	65.2%	77.9%	0.0%	0.0%	0.0%	55.3%	0.0%	0.0%	
Lesbian	<i>n</i>	0	24	1	1	0	2	0	0	28
	<i>%</i>	0.0%	7.3%	6.3%	11.1%	0.0%	4.3%	0.0%	0.0%	
Gay	<i>n</i>	25	1	2	1	0	6	0	0	35
	<i>%</i>	28.1%	0.3%	12.5%	11.1%	0.0%	12.8%	0.0%	0.0%	
Bisexual	<i>n</i>	3	23	4	1	0	7	1	0	39
	<i>%</i>	3.4%	7.0%	25.0%	11.1%	0.0%	14.9%	20.0%	0.0%	
Pansexual	<i>n</i>	2	8	4	2	1	1	2	0	20
	<i>%</i>	2.2%	2.4%	25.0%	22.2%	100.0%	2.1%	40.0%	0.0%	
Queer	<i>n</i>	1	9	5	4	0	2	2	0	23
	<i>%</i>	1.1%	2.7%	31.3%	44.4%	0.0%	4.3%	40.0%	0.0%	
Asexual	<i>n</i>	0	1	0	0	0	1	0	0	2
	<i>%</i>	0.0%	0.3%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	
Other	<i>n</i>	0	1	0	0	0	2	0	1	4
	<i>%</i>	0.0%	0.3%	0.0%	0.0%	0.0%	4.3%	0.0%	50.0%	
Prefer not to answer	<i>n</i>	0	6	0	0	0	0	0	1	7
	<i>%</i>	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	50.0%	
Total		<i>n</i>	89	330	16	9	1	47	5	499

Percentages and totals are based on responses.

a. Group

In addition to sexual orientation and gender, participants answered questions about disclosing LGBTQIA identity or being an LGBTQIA ally. For individuals who are LGBTQIA, “disclosure of one’s nonexclusive heterosexuality to self and/or others” (Fenaughty & Harre, 2003, p. 3) is known as outness (Riggle et al., 2017), or to come out, or the process of coming out. At work, nearly half of the participants in the LGBTQIA group were fully open (48.4%, *n* = 45), and almost one-third were out to those they trusted (15.1%, *n* = 14) or were partially open (14%, *n* = 13). Conversely, 21.5% (*n* = 20) of participants in the LGBTQIA group had not disclosed their identity at all. Just over

one-third of participants in the heterosexual and cisgender group identified as LGBTQIA allies (34.7%, *n* = 111).

Descriptive Statistics: Authenticity at Work

The IAM Work measurement scale results generated a Cronbach’s α coefficient of .86. The mean summative score on the authenticity at work variable was 5.29 (*SD* = .88, *n* = 413). The distribution of the authenticity at work scores had a slight negative skew (-.83), showing a left tail toward a small number of lower values representing does not describe me at all. A more significant number of responses were concentrated in the middle values of describes me (*M* = 5.29), thereby capturing a

near-normal distribution. Table 3 shows the descriptive statistics for work authenticity and satisfaction with a supervisor.

Descriptive Statistics: Satisfaction with Supervisor

An individual's score was the average of their 5-Point-Likert scale responses for all 18 questions. The SWMSS study results generated a Cronbach's α coefficient of .97. The mean summative score on satisfaction with a supervisor was 3.98 (SD = .84, $n = 413$). The mean summative score for LGBTQIA was 3.77 (SD = 1.00, $n = 93$), higher than the

heterosexual and cisgender group's 4.05 (SD = .77, $n = 320$). The participants had cumulatively selected the Likert-scale option of 5, affiliated with very satisfied, which resulted in a non-normal distribution. The satisfaction with a supervisor score distribution had a high negative skew (-.90), showing a left tail toward lower values indicating a low number of very dissatisfied. Figure 1 shows the number of participants, by group, with a particular score for the SWMSS. Table 3 shows the descriptive statistics for work authenticity and satisfaction with a supervisor.

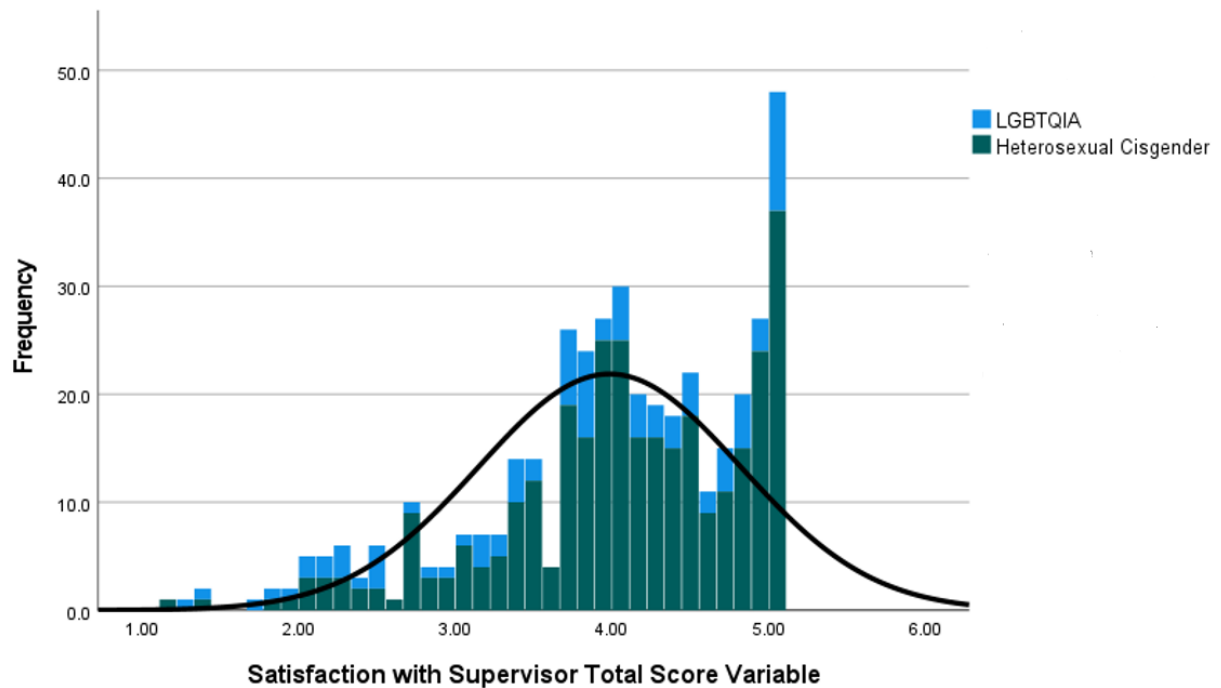
Table 3

Descriptive Statistics Using Measurement Scale Total Score

	N	Minimum	Maximum	Sum	Mean	Std. Deviation	Skewness	Std. Error
	Statistic	Statistic	Statistic	Statistic	Statistic	Statistic	Statistic	Statistic
Work Authenticity	413	1.58	7.00	2185.42	5.29	.88	-.83	.12
Satisfaction with Supervisor	413	1.17	5.00	1645.67	3.98	.84	-.90	.12
Valid N (listwise)	413							

Figure 1

Histogram of Satisfaction with Supervisor Total Score by Group



Note: The histogram captures data points for the two groups of *LGBTQIA* ($M = 3.77$, $SD = .10$, $n = 93$) and *Heterosexual and Cisgender* ($M = 4.05$, $SD = .77$, $n = 320$) participants.

Inferential Statistics

Findings for RQ1

An independent t-test was used to answer if there is a significant difference in work authenticity between workers who identify as LGBTQIA or those who identify as cisgender

and heterosexual. There was a statistically significant difference in work authenticity scores for LGBTQIA ($M = 5.01$, $SD = .96$) and heterosexual and cisgender ($M = 5.4$, $SD = .85$) participants; $t(136.55) = -3.31$, $p = .001$. Table 4 captures the results of the independent t-test results.

Table 4

Work Authenticity Independence Samples Test

		Levene's Test for Equality of Variances		t-test for Equality of Means						95% Confidence Interval of the Difference	
		F	Sig.	t	df	Sig. (2- tailed)	Mean Difference	Std. Error Difference		Lower	Upper
Work Authenticity Total Score	Equal variances assumed	6.69	.010	- 3.54	411	.000	-.36	.10		-.57	-.16
	Equal variances not assumed			- 3.31	136.55	.001	-.36	.10		-.58	-.15

Findings for RQ2

To answer if there was a significant relationship between perceived work authenticity and satisfaction with a supervisor, the Pearson's-moment correlation (r) was used. The null hypothesis was rejected at the 95%

confidence level. There was a statistically significant positive relationship between satisfaction with a supervisor and work authenticity, $r(411) = .39$, $p = .000$. Satisfaction with a supervisor ($M = 3.98$, $SD = .84$) was lower than authenticity ($M = 5.29$, $SD = .88$). See Table 5, Table 6, and Figure 2 for more detail.

Table 5

Descriptive Statistics for Correlation

	Mean	Std. Deviation	N
Work Authenticity	5.29	.88	413
Satisfaction with Supervisor	3.98	.84	413

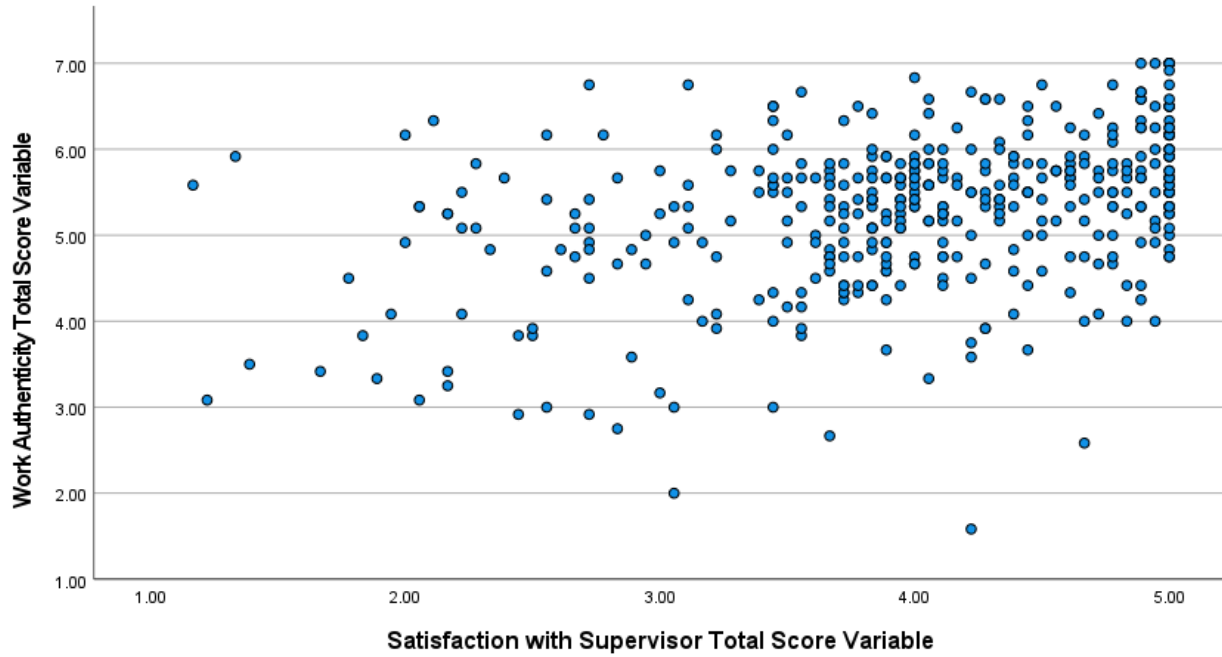
Table 6*Correlation between Work Authenticity and Satisfaction with a Supervisor*

		Work Authenticity Total Score Variable	Satisfaction with Supervisor Total Score Variable
Work Authenticity	Pearson Correlation	1	.39**
	Sig. (2-tailed)		.000
	Sum of Squares and Cross-products	321.76	118.50
	Covariance	.78	.29
	N	413	413
Satisfaction with Supervisor	Pearson Correlation	.39**	1
	Sig. (2-tailed)	.000	
	Sum of Squares and Cross-products	118.50	288.38
	Covariance	.29	.70
	N	413	413

** . Correlation is significant at the 0.01 level (2-tailed).

Figure 2

Scatter Plot of Work Authenticity and Satisfaction Variables



Findings for RQ3

Two general linear regressions were calculated to determine if there was a significant interaction between the three variables' effects. For the two general linear tests, a power calculation was run as a single test to correct all p-values accordingly and where one test was $\alpha = .05$. The power calculation reduced the risk of Type-I errors, which increased the case for Type-II errors, which is why sufficient power was ensured with a large sample size. Levene's Test of Equality of Error Variance confirmed a significant difference between the groups indicating that the homogeneity assumption was violated. In other words, the DV of work authenticity was not equal across groups with the intercept of satisfaction with a supervisor and the two groups. However, the two-way ANOVA tests were relatively standard in

violating the homogeneity test and did not prevent a continuation of the analysis.

A general linear univariate two-factor ANOVA model was first completed to address the interaction effects between the three variables of interest. There was a statistically significant difference in scores between the effects of work authenticity, the demographic grouping variable of SO&GI ($F(1, 310) = 6.30, p = .013$), and satisfaction with a supervisor ($F(63, 310) = 3.25, p = .000$). The differences between the LGBTQIA and heterosexual and cisgender groups could contribute to 32.3% of the variance in work authenticity. Satisfaction with a supervisor could contribute 20% of the variance in work authenticity. However, the interaction or moderation between the two groups, satisfaction with a supervisor, and work authenticity were not statistically significant ($\alpha = .05; p = .317$; Table 7).

Table 7

Univariate Test of Between-Subjects Effects

Dependent Variable: Work Authenticity Total Score

Source	Type III Sum of Squares	df	Mean Square	F	Sig.	Partial Eta Squared
Corrected Model	131.21 ^a	102	1.29	2.09	.000	.41
Intercept	3879.88	1	3879.88	6312.17	.000	.95
LGBTQIA and HetCis	3.87	1	3.87	6.30	.013	.32
Satisfaction with Supervisor Total	90.83	63	1.44	2.35	.000	.02
LGBTQIA and HetCis * Satisfaction with Supervisor Total	25.79	38	.68	1.10	.317	.12
Error	190.55	310	.62			
Total	11886.04	413				
Corrected Total	321.76	412				

a. R Squared = .41 (Adjusted R Squared = .21)

As indicated by the first general linear model, the univariate analysis, there was not a statistically significant interaction as a mixed effect between the demographic grouping variable of SO&GI and satisfaction with a supervisor with work authenticity. However, there was statistical significance with each independent variable as it related to work authenticity. A second general linear Multivariate Test model was completed as a post hoc analysis to understand the results better.

The Multivariate test model analyzed the interactions of the two IVs (e.g., satisfaction with supervisor and SO&GI) with the work authenticity tool's three domains (e.g., external

influences, authentic living, and self-alienation). The demographic grouping of the SO&GI variable moderated the effect of satisfaction with a supervisor and was statistically significant for the four questions on self-alienation. The questions were At work, I feel alienated ($F(319, 38) = 1.68, p < .009$); I don't feel who I truly am ($F(319, 38) = 1.87, p < .002$); At work, I feel out of touch with the real me ($F(319, 38) = 2.11, p = .000$); and In my working environment, I feel cut off from who I really am ($F(319, 38) = 2.01, p < .001$). In other words, for self-alienation, there was a 35% to 49% chance that the variance was predicted by the interaction (Table 8).

Table 8

Multivariate Test of Between-Subjects Effects with Work Authenticity

Source	Dependent Variable	Type III Sum of Squares	df	Mean Square	F	Sig.
Corrected Model	True most situations	205.82 ^a	102	2.02	2.12	.000
	I feel alienated	534.76 ⁱ	102	5.24	3.58	.000
	Do not feel who I truly am	443.83 ^j	102	4.35	2.88	.000
	Out of touch w real me	410.09 ^k	102	4.02	3.16	.000
	Cut off from who I really am	397.49 ^j	102	3.90	3.52	.000
LGBTQIA and HetCis * Satisfaction with Supervisor Total	True most situations	51.72	38	1.36	1.43	.054
	Stand by what believe	29.51	38	.78	.74	.866
	Behave w values and beliefs	28.59	38	.75	1.23	.176
	Easier w people when myself	58.80	38	1.55	1.09	.338
	Do what others expect	94.27	38	2.48	.92	.615
	Influenced by opinions of others	99.52	38	2.62	.94	.569
	Others influence me greatly	99.42	38	2.62	.98	.513
	Behave in manner expected	72.86	38	1.92	.69	.921
	I feel alienated	93.72	38	2.47	1.68	.009
	Do not feel who I truly am	107.30	38	2.82	1.87	.002
	Out of touch w real me	102.25	38	2.69	2.11	.000
	Cut off from who I really am	84.59	38	2.23	2.01	.001

a. R Squared = .41 (Adjusted R Squared = .22), i. R Squared = .54 (Adjusted R Squared = .39), j. R Squared = .49 (Adjusted R Squared = .32), k. R Squared = .51 (Adjusted R Squared = .35)

Results: Summary of Findings

In summary, for all three research questions, the results are:

1. LGBTQIA participants reported lower levels of authenticity in the workplace than the heterosexual and cisgender participants at a statistically significant level.
2. Work authenticity was positively correlated with satisfaction with one's supervisor.
3. A statistically significant interaction (e.g., cross effect) of work authenticity, satisfaction with a supervisor, and the variable of SO&GI was found for the dimension of self-alienation.

Implications

The research literature and theory support the results of this study. For RQ1, the scholarly literature may explain the lower authenticity scores for LGBTQIA workers. Lower authenticity scores could be explained by recorded evidence of stressors or discrimination faced by LGBTQIA individuals who disclose or conceal their identity at work (Eliason et al., 2018; Hossain et al., 2020; Longarino, 2019; Newheiser et al., 2017). The level of authenticity reported by the LGBTQIA individuals in the results may vary if the participants worked at a different organization. The decision to share or hide one's identity is governed by a complex set of factors (Fletcher & Everly, 2021). For example, a nationwide meta-analysis quantitative study of sexual orientation, well-being, and job satisfaction among Swedish workers by Aldén et al. (2020) revealed complex results - job satisfaction differed between gay men, lesbians, and heterosexual workers (Aldén et al., 2020). Another factor that could cause variance in the level of authenticity is whether workplace discrimination policies are in place (Gacilo et al., 2018; Webster et al., 2018). Because the LGBTQIA participants worked at a Fortune 50 organization with protective workplace policies, the level of authenticity measured in this study could be higher than an organization without the same protections.

Pertaining to RQ2 and the influence of supervisors, the literature suggests that supervisors can strengthen workplace authenticity, benefits, and outcomes through increased support (Ma et al., 2020; Metin et al., 2016; Sedikides et al., 2019). Differences in satisfaction with a supervisor and authenticity could be linked to the conflict between the

supervisor and a subordinate. For instance, Kernis and Goldman (2006) found that misunderstandings and conflict with others are linked to inauthenticity (Sedikides et al., 2019). Alternatively, work teammates can influence authenticity (Emmerich et al., 2020). For LGBTQIA individuals, available literature suggests that supervisors contribute to LGBTQIA and workplace security, fairness, and well-being when organizational workplace diversity policies and programs exist (Elias et al., 2018; Gacilo et al., 2018; Hossain et al., 2020). Conversely, Knoll et al.'s early research (2015) to create a worker authenticity instrument indicated that an individual's responsible behavior, optimal self-esteem, and moral courage might cause worker success to override destructive leader influence. Finally, SDT highlights the role of the supervisor's style in predicting turnover, work quality, satisfaction, and job retention since "it is often said that people don't leave jobs, they leave their bosses" (Ryan & Deci, 2019, pp. 40-41).

For RQ3, the statistically significant interaction between the authenticity characteristic of self-alienation and satisfaction with one's supervisor could be explained by the experience of discrimination against LGBTQIA. For individuals identifying as LGBTQIA, prevalent theories suggest that self-acceptance and disclosure of their orientation are key factors of identity, well-being, and authenticity (Camp et al., 2020; Cramer et al., 2017; Eliason et al., 2018; Everett et al., 2019; Fletcher & Everly, 2021; Li et al., 2019). Also pervasive in scholarly literature is that LGBTQIA identity disclosure may lead to authenticity and well-being and that this disclosure may lead to increased psychological distress and discrimination (Aldén et al., 2020; Everett et al., 2019; Fletcher & Everly, 2021; Gardner & Prasad, 2022; Martinez et al., 2017; Webster et al., 2018).

Study Limitations

This methodology retains inherent limitations, such as potential selection bias, in that the recruitment of participants relied on the non-randomized and non-probability sampling technique of purposive and snowball. In addition, participant bias could have also occurred, as the informed consent stated the research goals, and participants were asked to self-report their perceived situational experiences. A standard limitation is whether participants may provide truthful responses, mainly if the survey asks for personal information (Roberts & Allen, 2015). For

example, participants could hesitate to disclose their sexual orientation or gender identity or negative feedback about a supervisor in the study. However, this risk was minimized in this study because identifying information about the participant or their supervisor was not collected. Additionally, as one researcher in LGBTQIA studies, Sell (2017), wrote, “[w]e now have empirical evidence from hundreds of studies that people do not mind telling investigators or service providers their sexual orientation or gender identity” (p. 1213).

The survey data stemmed from Likert-type scales. Data from Likert Scales are technically categorical or ordinal levels of measurement, but researchers frequently group data as continuous or interval for statistical analysis in parametric tests (Chyung et al., 2017). Likert Scale data often creates bimodality because respondents will choose one end of the scale, such as strongly agree/agree or strongly disagree/disagree. The middle category of neither agree nor disagree is chosen less, causing a dip in a graph as bimodality (Knapp, 2007). Within the statistical analysis for this research, as seen with Likert Scales responses used as interval data, the SWMMS scores were not normally distributed. As a result, the homogeneity test was violated for the general linear model, although a failed homogeneity test is not uncommon for a univariate general linear model. Furthermore, the primary effect for the interaction of the two IVs of satisfaction with a supervisor and SO&GI with the dependent variable of work authenticity was not statistically significant. Statistical significance was only found in the post hoc test for the work authenticity sub-set questions measuring self-alienation.

The results are limited to one large Fortune 50 organization in the U.S. with a reputation for having a culture of diversity and inclusion, so there are limited applications of these findings to other organizations or industries depending on size, regional presence, type, or discrimination law. In addition, the researcher was an ally and did not identify as LGBTQIA, limiting their understanding of lived experiences. Conversely, allying or advocating for a cause may also create a cognitive or social bias influencing the results evaluation, conduct, and communication (Ellsworth, 2021).

The study excluded confounding variables that likely influenced the results, including the unique characteristics of LGBTQIA. This research study binned individuals into groups, such as LGBTQIA or heterosexual and

cisgender, which does not fully represent the unique nuances of each participant. Additionally, grouping participants as LGBTQIA does not capture the unique situational differences experienced in the workplace. Literature suggests that the individuals represented by the initialism have different experiences in the work environment (Camp et al., 2020; Everett et al., 2019; Fletcher & Everly, 2021; Ng & Rumens, 2017; Pichler et al., 2017). For instance, “bisexual individuals and lesbians are at increased risk of minority stressors related to their sexual orientation and other aspects of identity (e.g., gender conformity) compared with gay men” (Camp et al., 2020, p. 2366). Transgender employees may challenge heteronormative or cisnormative beliefs, embedded gender roles, and organizational protocols such as restroom usage (Eliaison et al., 2018).

Recommendations for Research

For future research, evaluating antecedents to authenticity would be important, as the outcomes of authenticity have been extensively studied and documented (Gan et al., 2018). The workplace offers a robust situational context to study drivers of authenticity. Additionally, exploring results from other organizations, industries, or institutions with different cultures or inclusion policies could expand scholarly knowledge of its impact on authenticity.

Many confounding variables could be studied. Confounding variables found in the literature review included organizational and societal culture (Jang & Chen, 2022; Jones, 2021; Jones, 2022; Valenti, 2021), peer or teammate influence (Camp et al., 2020; Elias et al., 2018; McNulty et al., 2018; Ng & Rumens, 2017; Schneider et al., 2017), intersectionality (Fassinger et al., 2010; Jones, 2016; McGuffey, 2018; Miller, 2018), neurodiversity (Doyle, 2020; Egner, 2019; Komarow & Hector, 2020; Richards et al., 2019), LGBTQIA unique characteristics (Almario et al., 2013; Camp et al., 2020; de Lira & de Moraes, 2018; Everett et al., 2019; Fenaughty & Harre, 2003; Li et al., 2019; Pichler et al., 2017; Vaughan et al., 2014), regional differences (Rickard & Yancey, 2018; Swank et al., 2012), leader prejudice (Almario et al., 2013), and privilege (Fassinger et al., 2010; Jones, 2016; McGuffey, 2018; Miller, 2018).

Two confounding variables that deserve extra attention are the unique characteristics of workers identifying as LGBTQIA and intersectionality. Humans are complex, yet

social research is confined to simplifying behavior or characteristics into categorizable demographic variables.

This research study binned individuals into groups, such as LGBTQIA or heterosexual and cisgender, which does not fully represent the unique nuances of each participant. Drawing out these nuances on how workplace inclusion is experienced (Ng & Rumens, 2017) or its impact on authenticity for the minority group of LGBTQIA workers would be valuable; however, one critical challenge would be obtaining an extensive sample to achieve statistical significance.

Recommendations for Practice

The findings of this research study offer organizations, leaders, and human resource departments insight into leveraging supervisors and enhancing policies to support authenticity for all sexual orientations and gender identities. Interventions or interactions could be helpful if fostering open communication around a holistic strategy meeting workers' intrinsic and extrinsic needs for well-being. Additional recommendations from the findings include supporting a diverse and inclusive environment for LGBTQIA workers to be authentic in the workplace. The results of this study parallel scholarly literature that suggests supervisors can strengthen workplace authenticity, benefits, and outcomes through increased support (Ma et al., 2020; Metin et al., 2016; Sedikides et al., 2019).

Conclusion

This exploratory study aimed to investigate state-based perceived work authenticity, satisfaction with a supervisor, and the influence of sexual orientation and gender identity within one Fortune 50 company in the United States. In addition, differences in perceived authenticity and satisfaction with a supervisor were assessed by dividing participants into two groups—one as LGBTQIA and the second as cisgender and heterosexual. While not generalizable to all organizations or workers, these research study findings align with previous scholarly literature and are supported by the theoretical foundation of SDT. The results indicate that authenticity is correlated to satisfaction with a supervisor and that workers who identify as LGBTQIA report lower levels of authenticity, especially in self-alienation. The research study and findings suggest recommendations for future research and improved organizational and human resource

management practices that could benefit both individuals and organizations.

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Classroom Technology and Pedagogical Shifts

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ABSTRACT

With the introduction of screen media and 1:1 devices in the classroom, educators are finding themselves in a unique position; navigating new technological platforms, changing their teaching methods and pedagogy to adapt, and oftentimes, competing for their students' attention. Some important factors for classroom implementation and practice are the need for learner preference, differentiation, high quality applications, and a complementary balance between traditional methods of learning and the usage of screen media. Many teachers have observed the benefits of adopting new technology but have concerns with its integration. Classrooms in the United States have undergone a significant change because of the use of screen media, including laptop computers (i.e. Chromebooks), and digital textbooks. While using technology in the classroom is undoubtedly not a novel concept, utilizing technology in place of traditional textbooks is relatively new. The motivation for this article was my personal experience and interest in technology for learning purposes. I have taught middle school students for 16 years, and throughout this time I have seen technology substitute traditional textbooks in various subject areas. Additionally, I have seen the effects of reading from a paper source and from screens, as well as the various strategies learners apply while using both to process the information. As a lifelong learner, I remain abreast of the most recent studies and advice on literacy for children, as well as technology use with adolescents. I incorporate best practices in my classroom. This article will provide ideas that have proven successful, not only in my classroom, but also in the empirical research.

Keywords: Screen media, differentiation, pedagogy, Chromebooks

Classroom Technology and Pedagogical Shifts

The adoption of technology has become necessary in many schools as a result of recent modifications to the Common Core State Standards (CCSS) beginning in 2010 (Common Core State Standards Initiative, 2019). In this paper, I will discuss the advantages and disadvantages of using technology in the classroom, ultimately arguing that a hybrid approach, which uses both traditional methods and modern technology, is preferred. Because textbook publishers now offer online versions or digital downloads of their classic textbooks, Chromebooks are rapidly replacing traditional paper textbooks in classrooms. Schools across the United States are choosing to buy online textbooks instead of physical ones. Electronic textbooks typically cost less than their paper counterparts, but numerous studies have produced conflicting results in terms of the

format's broader implications, with some pointing to the advantages of using technology in the classroom and others the opposite. Additionally, digital copies cannot be misplaced, harmed, or stolen, saving school systems a significant amount of time and money. For instance, when a Chromebook is lost, only one device needs to be replaced, versus multiple texts. In order to fully understand the experience and subsequent impact on educators' instructional methods, researchers are beginning to explore the topic of technology integration in the classroom and the best practices for fostering student comprehension via screen media.

Classroom Practice

In 1987, researchers began examining the usage of screen media for educational purposes (Cuban, 1987). Since the subject first caught the interest of scholars over three decades ago, screen media and how it is used

have undergone significant changes. For instance, the release of Apple's iPhone in 2007 popularized the first smartphone and the first dedicated eBook reader (Amazon's Kindle) became widely available around the same time. In addition, Google released its well-known Chromebook in 2011, a compact computer made primarily for using the Internet (Burns, 2011). Because they were invented only recently, these devices did not exist during earlier studies. However, they are now widely used in schools. Currently, 97% of classrooms in the United States use computers and 58% of schools utilize portable electronic devices, such as Chromebooks (National Center for Education Statistics, 2018). Chromebooks are often favored because of their affordability.

Technology and how it is used have changed significantly since the topic initially caught the attention of experts in 1987. The teacher-student dynamic is impacted by the use of technology for learning, and it may change pedagogical approaches (Kucirkova & Littleton, 2017). Due to the lack of page turning when reading online textbooks on a screen, teachers may find it challenging to determine whether students are correctly following along (Singer & Alexander, 2016). Additionally, when using screen media, students make less eye contact with the teacher (Richert, et al., 2011).

Suggested Practice

It is crucial for educators to take into account if including computers in the learning environment could disrupt, divert, or entice the learner's process of producing new information (Clark & Mayer, 2008). One obstacle with using technology for learning is that it may be difficult for students to study at their own pace and to collaborate, since they may be at different points in the reading due to the self-guided nature of many applications and programs. Teachers have had to surrender their autonomy to technology because of technology implementation's flexibility and customization; students now seek information from sources other than the teacher, as they are no longer seen as the expert (Waters, 2018). The use of screen media may also streamline organizational processes, allowing students to focus more on learning and engage in projects that promote individualized engagement and deeper skill development (Google, 2013).

According to Parkay, et al. (2014), curriculum should be developed with the advancement of technology and its integration into the classroom environment in mind. This

applies to curriculum created for both new educators entering the field of education and seasoned educators already working in the classroom. According to Seward and Nguyen (2019), having computer skills in the classroom can help students' creativity to blossom in multiple subject areas. It can also improve reading and writing skills, and critical problem-solving capabilities.

A policy brief was created by the U.S. Department of Education (DE, 2016) to outline the major issues and potential remedies for the efficient integration of technology in teacher development. The policy provided a set of guidelines for teachers on how to successfully incorporate technology into the curriculum. Furthermore, the policy provided curriculum updates for programs preparing teachers in order to find avenues for cooperation in the educational sector (DE, 2016). As they spend up to five hours a day using technology for schoolwork, students have expressed frustration that it can be "boring and annoying to just sit there and stare at a computer all day long... you have to teach yourself" (Malkin, 2019, para. 10).

The DE (2016) underlined the necessity for curriculum leaders and faculty to collaborate in sharing cutting-edge tools and practices in the field to ensure that technology is used in a way that is conducive to learning and success rather than simply being used for the sake of the technology. The responsibilities of instructors and students have been impacted by these technological advances. In order for students to develop into critical thinkers who can, from the immense pool of materials, distinguish important information from the immense pool of available materials, instructors must assist students in this process (Parkay et al., 2014). Due to the ease of access and regular usage of cellphones, laptops, and social media among students today, educators must be able to design learning experiences that seamlessly integrate technology (DE, 2016). In this manner, curriculum helps students form good habits towards the use of technology and its function in daily life.

Implementation

Because of the vast array of learner preferences, differentiation is crucial for the successful implementation of technology-based education tools (e.g., eBooks). Students perform better when using the platform they are most familiar with since it gives them more freedom to seek information and demonstrate their expertise. For reading novels and other

literature, as well as assignments posted on digital platforms like Google Classroom, students frequently ask for paper copies of the assignments. It is crucial to differentiate instruction and take into account students' learning preferences when integrating technology into the classroom, particularly for kinesthetic learners who might benefit from engaging in tactile, three-dimensional activities. Gifted and special education students, as well as those with reading difficulties, frequently have particular needs when it comes to knowledge acquisition.

Technology and paper resources are complementary; students use their Chromebooks to look up unfamiliar words they come across while reading a book with their class. Moreover, students find it helpful for comprehension to read a synopsis after reading a certain passage or text, and if they want to know what an author looks like, they can simply use the Internet. However, students may not always treat technology assignments with the same seriousness they would if they were on paper. Utilizing technology effectively usually means pairing it with another resource, such as a textbook, workbook, or primary source, or dividing class time between using technology and textbooks.

Conclusion

It is necessary to allow for learner preference and differentiation while using technology for educational purposes. While there are many favorable outcomes when using technology, there are still issues and concerns. Classroom teachers grow frustrated by some students' inability to use the Internet when working from home and the instability of the Internet in the classroom. Paper copies of assignments are often required since students frequently forget to charge their devices or forget them altogether. It is advantageous to be able to boost student engagement by implementing educational games and applications tailored to the material being taught in the classroom. On the contrary, students frequently lose attention due to the allure of online distractions and often browse unrelated websites, necessitating teachers' constant monitoring of student activities to ensure that students stay on track. Using instructional time to monitor off-task activities and manually block students' tabs (i.e. "policing"), in addition to distracting the teacher, ultimately forms a barrier to student learning.

Students "learn best with a combination of technology and paper," according to earlier research, which found textbooks to be a "useful springboard" for learning (Arnold, 2013, p. 234). When switching from one medium to another, it is advantageous for educators to discuss variations in educational techniques through collaboration with other educators. Since the empirical literature has indicated that children learn best when given material through both mediums, educators should not completely abandon textbooks by replacing them with computers. Technology should not be utilized solely to supplement conventional paper means of information delivery.

The best way to evaluate learners' knowledge is to interact and participate in oral dialogues. When using technology for learning, it should be possible to accommodate student preferences. Being mindful of students who may have differing abilities, unique reading levels, and prior understanding and experience with technology, are all factors of importance when engaging learners with technology. The modern classroom must maintain a balance between teaching and learning; utilizing technology, traditional methods, and paper-based resources.

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The Role of the Human Resource Department in Organizational Downsizing

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ABSTRACT

In preparation for an incoming economic recession, organizations in the United States and across the globe are now actively engaging in various downsizing tactics, such as layoffs and hiring freezes, to strategically reduce their workforce. The Human Resources department then has the important responsibility of effectively managing the impact of the downsizing process by mitigating the legal, ethical, and social risks that may arise as a result of layoffs, such as helping affected employees better manage the resulting stress, and empowering surviving employees to continue productivity. While most companies focus solely on continuing business operations after layoffs and reducing legal and publicity risks, not much is done to alleviate the stress so that the organizations' remaining employees can better cope with their new situations. This paper provides a brief overview of the concept of organizational downsizing and its effect on employees. Additionally, the paper describes the function of the HR department in the downsizing process and concludes that the HR department has a responsibility to both surviving and affected employees. This paper then examines the responsibility of the department to both parties.

Keywords: Organizational downsizing, layoffs, survivor management, human resources, HR Responsibilities

The Role of the Human Resource Department in Organizational Downsizing

From layoffs to hiring freezes, organizations in the United States of America (USA) in the past few months have been taking drastic measures to prepare for an incoming economic recession. Downsizing is the most popular method employed by organizations to deal with the unpredictable and volatile nature of the global economy (Chadha, 2021). Cirillo et al. (2020) suggest that typically, "Employees are considered an asset instrumental to an organization performing better; however, they can also be seen as a liability when performance increase or cost reduction is needed" (p. 1). The impending recession thus explains why several organizations in the USA are now resorting to

different downsizing strategies to stay ahead of the volatile nature of the business environment.

Ataullah et al. (2022) observe that "about 45% of firms with performance shocks downsize at least 5% of the workforce and about a fifth of the firms downsize at least 20% of the workforce" (p. 2). Ataullah et al. (2022) further posit that diversified firms are most likely to be forced to downsize in the case of economic recession or performance shock because they typically have larger workforces in comparison to single-segment organizations. Table 1 shows a curated list of popular companies that have resorted to reducing their workforce in the year 2022, most of which are diversified firms and have actively downsized between 5 - 20% of their workforce.

Table 1*Curated List of Notable Companies Currently Engaging in Layoffs in the United States*

Notable Companies that have Downsized	Period	Number of Downsized Employees
Tesla	June, 2022	229
Peloton	February, 2022	4,150
Shopify	July, 2022	1000
GoPuff	March, 2022	400
Netflix	June, 2022	450
Robinhood	August, 2022	1,013
Redfin	June, 2022	470
BlockFi	June, 2022	170
Carvana	May, 2022	2,500
Vroom	August, 2022	647
Rivian	July, 2022	840
Invitae	July, 2022	1000

Note: Curated from “Tech Layoffs In 2022: The U.S. Companies That Have Cut Jobs” by Vedantam, K. (2022, August 12). <https://news.crunchbase.com/startups/tech-layoffs-2022/>

Downsizing is a strategic workforce reduction decision implemented by an organization to reduce labor expenses, boost profitability, and, in times of extreme economic volatility, prevent organizational collapse (Frone & Blais, 2020). While the projection of an impending economic recession and rising inflation rates are the leading causes of organizational downsizing today, other factors, such as technological disruptions to industries, mergers between two companies, corporate restructuring, or competitive rivalry, could also warrant company downsizing (Anekwe & Nwanah, 2021). Frone and Blais (2020) explain that irrespective of the reasons for downsizing, this decision creates two groups of workers. The first category describes affected workers who involuntarily lost their jobs ("affected workers") and the second category describes workers who survived the downsizing process ("survivors").

As many organizations are resorting to the use of hiring freezes and layoffs to downsize their workforce, much is expected of the Human Resources (HR) department to effectively manage the human element of a downsizing process (Mujtaba & Senathip, 2020; Tsai & Yen, 2008). If the downsizing process is not conducted properly, it could lead to even more disastrous outcomes, ranging from legal issues and bad publicity to a reduction in remaining employees' motivation and even higher turnover rates than expected. This paper aims to analyze

the concept of organizational downsizing and examine the role of the HR department in mitigating negative outcomes, as well as the effect of downsizing on the two affected parties: survivors (the employees who have not been laid off) and affected employees (employees who have been laid off).

The Concept of Organizational Downsizing

Organization downsizing is described as a strategy adopted by a company to reduce the scale of its business operations in an effort to improve financial performance (Gómez-Mejia et al., 2016). Large payrolls in the past were seen as a sign of a company's strength and success. Payroll is described as the overall cost of maintaining a workforce, such as employee salaries and wages, taxes and benefits (Saez et al. 2019). However, in the current economic climate and according to business news around the nation, having large payrolls is now seen as a liability, and organizations are looking to cut costs drastically.

While downsizing is generally viewed as a negative practice because of how it affects employees, and the organization as a whole, some studies have however shown that downsizing may be beneficial for regaining financial stability and strengthening a corporation. Table 2 describes some pros and cons of layoffs.

Table 2

Pros and Cons of Layoffs

Pros of Layoffs (Reasons)	Cons of Layoffs (Externalities)
Increasing profits, economic outlook, and overall company competitiveness.	Existing employees might be in a bind when knowledgeable and skilled workers are laid off. Consequently, customer service may suffer.
Cutting costs by reducing employee benefits and liability.	Current workers and laid off employees may risk suffering from occupational, psychological and other health issues
Laying off high paid employees and replacing them with lower paid employees.	Limited employees within a company/department may lead to more unhappy workers, which in turn may lower company revenue.
Getting rid of disengaged workers that cannot "pull their own weight" ("dead wood") and simply increase workload for other employees.	Laying off skilled workers may slow down production damage quality within the company.
Stockholders might receive a better return on their investments.	Attitudes become negative because employee thoughts of the possibility of easily being replaced and just being a number to the company.
Strategically planned layoffs lead to smarter organizations when tasks are properly revamped and reassigned (Mannino, 2010) .	

Note: Adapted from "Layoffs and downsizing implications for the leadership role of human resources" by Mujtaba, B., & Senathip, T. (2020). *Journal of Service Science and Management*, 13(02), p. 214.
<https://doi.org/10.4236/jssm.2020.132014>

Ramdani et al. (2021) found that downsizing could affect an organization's innovation outputs positively, especially when that organization is experiencing a shortage of resources. For organizations experiencing shortage or a lack of resources, downsizing has proven to yield positive results firstly because, employees may begin to compete with one another, leading to superior performance and increased creativity, out of concern that they would lose their jobs in potential future rounds of downsizing (Ramdani et al. 2021). Likewise, reallocation of employees to form new teams will foster creativity because these employees will bring together knowledge from all areas of the organization, and these newly formed relationships could be a rich environment for creativity.

The downsizing strategy can also be used to restructure an organization with the intent of enhancing shareholder value (Goesaert et al., 2015; Jung, 2015). However, the negative impact of downsizing or layoffs cannot be ignored, and if not managed properly, they can detrimentally affect the organization's overall effectiveness. Mujtaba and Senathip (2020) explain that downsizing could result in the loss of skilled and experienced talent, thus disrupting the flow of creativity within the organization. Likewise, downsizing may increase the stress levels on surviving employees (Dlouhy & Casper 2020). Harney et al. (2018) also assert that increased individual workload caused by downsizing could result in employee exhaustion.

A company can use various methods to downsize, such as layoffs, attritions, and hiring freezes. Arzuaga et al. (2021) classified the downsizing techniques into two categories: involuntary and voluntary terminations. "Voluntary terminations" are generally regarded as the less consequential form of downsizing, as it involves encouraging employees to volunteer themselves for retrenchment or early retirement by offering them attractive incentives (Arzuaga et al. (2021). On the other side, involuntary termination methods, which include strategies like hiring freezes, layoffs, diversifications, and shutdown of operational facilities, are more difficult to manage (Arzuaga, et al., 2021; Hansson, 2017).

Notable business news sites such as Crunchbase, Business Insider, BBC, New York Times, and the Wall Street Journal have shown that most affected organizations in the United

States are resorting to layoffs (terminating current employee contracts) and hiring freezes (not hiring new employees for a period) to downsize their staff. Layoffs refer to a downsizing technique that involves terminating employees using different deselection criteria such as individual performance, duration of employment, and sometimes, demographic characteristics like ethnicity, age (Arzuaga et al. 2021; Dwyer & Arbelo, 2012; Zatzick et al. 2015).

The Human Resource (HR) department is largely responsible for facilitating this process and managing the impact of layoffs on the two categories of dissatisfied stakeholders: surviving and affected employees.

Human Resource Department's Role in Managing Employee Separations and Downsizing

Several studies have suggested that the role of an HR department is highly critical within organizations for different purposes. An organization's major purpose is to create value to all its stakeholders in different capacities and develop a long-term sustainable framework (Oduyemi et al., 2020) and the HR department has the responsibility to implement this same value to employees, and also ensure that adequate workforce is readily accessible for a business (Patrick & Mazhar, 2021). Vermeeren et al. (2014) examined the function of Human resource management (HRM) and found that the effective implementation of HR practices is related to improved financial outcomes because it directly impacts the firm's net margins, organizational outcomes because it impacts client satisfaction, and HR outcomes because the implementation of the right HR practices reduces turnover and absenteeism rates.

Patrick and Mazhar (2021) on the other hand, suggest that the HR department is important because it directs the workforce, which is the most important element of a successful business. Several studies have supported the claim that the main roles of the department are to ensure adherence to labor laws, implement recruitment and training initiatives, oversee the compensation and benefits structure within the organization, provide relational assistance to employees, manage employee performance, and oversee the selection process of employees to be laid off when the organization decides to reduce its

workforce strength (Gómez-Mejia et al., 2016; Patrick & Mazhar, 2021).

Mujtaba and Senathip (2020) suggest that the HR department is essential to the strategic planning and execution of downsizing efforts. This implies that irrespective of the means an organization chooses for downsizing, HR is central to managing this process. Mujtaba and Senathip (2020) further explain that the HR department has the responsibility to plan, execute, and ensure alignment of the layoff decisions with business needs, while also avoiding possible negative consequences at all costs.

The first responsibility of the HR department is to review the downsizing decision and consider how this decision will impact the organization in the near future. The second responsibility is to explore all of the available alternatives, such as pay cuts or a reduction in employee benefits and hours, and present these alternatives to the decision-makers. Next, the department has the responsibility of planning the downsizing by deciding on layoff criteria alongside executives and departmental managers. Finally, the department has the responsibility of supervising the downsizing process, restructuring, and managing the effects of the layoffs on affected and surviving employees (Mujtaba & Senathip, 2020).

Similarly, Gómez-Mejia et al. (2016) posit that the HR function during a downsizing process begins with notifying employees about the intended layoffs. According to the Worker Adjustment and Retraining Notification Act (WARN), a federal law in the United States, employers with one hundred or more employees are expected to provide employees sixty days of advance notice before being laid off (Addison & Blackburn, 1994). Though the role of the HR department in many organizations ends after the layoffs have been implemented, the HR department has two additional responsibilities to ensure the continuous running of business operations after the layoffs: to keep surviving employee morale high and to make the transition to unemployment smoother for affected employees (Mujtaba & Senathip, 2020). Therefore, after organizational downsizing, the HR department is responsible for two types of employees: the surviving employees and the affected employees.

Responsibility of the HR Department to Supervisors

Survivors are referred to as employees who remain part of an organization after layoffs, restructurings, job cuts, or resignations have eliminated longtime coworkers (Makawatsakul & Kleiner, 2003). Leadership IQ, a leadership training and employee engagement survey firm, found that there is a general misconception that employees who survive layoffs are considered the lucky ones, and these surviving employees will not require any further special attention but would rather increase their productivity levels due to their contentment at still having a job. However, several studies have shown that layoffs can have a variety of detrimental repercussions on survivors, including psychological and physical health and drastically reduced productivity levels (survivor syndrome) (Andreeva et al 2015; Dlouhly & Casper, 2020; Frone & Blais, 2020; Gómez-Mejia et al. 2016).

The HR department is tasked with the responsibility of alleviating these concerns and managing survivor syndrome. "Survivor syndrome refers to the psycho-social problems such as increased anxiety due to uncertainty, feeling of loss, and risk aversion in employees who have survived cut-offs" (Samreen, et al. 2022 p. 2). Downsizing results in increased job demands (Harney et al., 2018), heightened feelings of job insecurity, and increased workload which will put more burden on the remaining employees (Dlouhy & Casper, 2020).

Surviving employees are often worried about their ability to perform the new tasks they are assigned. Gómez-Mejia et al. (2016) describe other potential impacts of downsizing on survivors as increased antagonism within the organization, higher absenteeism and turnover, reduced productivity and decreased job satisfaction. Van Dick et al. (2016) asserted that surviving employees lose their sense of organizational identity during layoffs. Organizational identity is a social identification and a source of self-esteem for an employee (Ahuja et al., 2021), and thus the loss of this identity could potentially lower employees' emotional attachment to the company (Van Dick et al., 2016). Hence, the HR department is responsible for alleviating these concerns and managing survivor syndrome.

Survivor Management

While few organizations provide programs to help the employees who have been affected by the downsizing decision, even fewer have programs to help survivors adjust to the new organizational changes (Appelbaum, et al. 1997). The goal of the HR department, in conjunction with line managers, should be to ensure that surviving employees are kept motivated and rebuild loyalty within the organization.

The first step toward effective survivor management is developing an effective communication strategy to discuss the layoff (Mujtaba, & Senathip, 2020). Poor communication creates a misunderstanding of the organization's goals and strategic mission and surviving employees are more likely to remain positive if they understand the reasons for the layoff, and how it will benefit them and the organization as a whole (Appelbaum, et. al 1997). It then becomes the HR department's responsibility to develop an innovative communication plan to best address survivor questions and concerns (Dirani, et al., 2020). The goal of the communication plan is to persuade the surviving workforce that the layoff decision was necessary, legal, just, and designed to benefit the firm. This information should be factual so that it does not result in negative backlash.

Survivors strongly rely on the human resource personnel and their line managers for reassurance. "HR should implement measures to instill confidence in the company, assure employees of their value to the organization, and communicate to all workers the company's reason(s) and rationale for the layoff" (Mujtaba, & Senathip, 2020. p. 221). Hence, a part of the communication plan should be designed to reassure employees of their value and notable contributions to the organization. During layoffs, many people gossip about the changes occurring in the organization and the only way to curb this is to effect transparent communication (Hafen, 2004). Several studies have shown that employees require honest and transparent communication about the situation at hand, information about resources available to alleviate the emotional and mental trauma caused by the situation, and a stronger acknowledgement of the difficulty of the current

situation (e.g., Dirani et al., 2020; Orangefiery, 2020). Various employees have differing concerns, and it is the HR department's responsibility to listen, understand, and alleviate each individual's concerns and make each employee feel safe enough to continue to be productive in the workplace (Dirani, et al., 2020). It is important to make employees feel heard, and in turn communicate back to them what they need to hear.

Staffing

Albdareen and Khasawneh (2019) describe staffing as one of the most critical duties of the HR department that must be performed with a high level of effectiveness and efficiency. During layoffs, reshuffling surviving employees' job duties could significantly disrupt the entire existing employment relationship. Thus it becomes important to revisit the staffing function of the HR department. Due to the reduction in staff strength during layoffs, organizations may be tempted to overschedule employees, reallocate responsibilities, or take any other drastic measures to maintain continuous business operations. The HR department is thus responsible for ensuring that effective work redesign strategies are implemented. Anekwe and Nwanah (2021) describe work redesign strategies as actions that include redefining job descriptions, reducing work hours, or merging departments. The work redesign strategies implemented regarding the rescheduling and reallocation of employees should however consider the welfare of survivors and ensure compliance with labor laws fairly and efficiently.

Albdareen and Khasawneh (2019) further explain that the staffing function should be a process through which organizations can establish an appropriate fit between an employee and his job and align the individual to the culture and values of the organization, thus creating a sense of satisfaction, belonging and commitment on the individual's part. Thus, to achieve this right fit, the HR department is recommended to conduct a job analysis. The job analysis makes it possible to facilitate workforce planning by matching vacant job content and requirements with surviving employees' competencies, skills, and knowledge (Morgeson, et al., 2019). Job analysis is also very crucial in determining roles or tasks that are not

necessary so that these roles can be merged or eliminated based on the availability of remaining employees.

To commemorate the newly allocated job responsibilities, and in some cases, longer work hours, it becomes necessary to revisit and make adjustments to compensation and benefits if possible (Gómez-Mejia et al., 2016). Most likely, surviving employees will feel entitled to increased benefits or a raise in pay for taking on added work or some other sort of alternative compensation to replace the loss of other fringe benefits they had before the layoffs.

Training and Development

After layoffs are completed and surviving employees have been reallocated job responsibilities, it is the HR department's responsibility to prepare the survivors for their new realities. The HR department is thus responsible for conducting a needs assessment to decipher the organization's needs, tasks needs, and individual needs in order to develop the appropriate kind of training required (Mahmud et al. 2019). Conducting a training needs assessment will help the department identify skill gaps and improvement areas now available in the workplace. A recent study by Mahmud et al. (2019) showed that training needs assessments play a significant role in improving employees' performance. Therefore the training needs of surviving employees should be thoroughly analyzed, and these employees should be trained or enrolled in developmental programs to equip them with the capabilities necessary to assume or fill up vacant roles.

Responsibility to Affected Employees

Once the decision to downsize has been made, the HR department is responsible for reviewing union regulations, collective bargaining agreements, and other local legislation, as necessary, to ascertain all financial obligations due to affected employees (Mujtaba & Senathip, 2020). The organization, and specifically the HR department, has a legal and ethical responsibility to affected employees to pay off unemployment benefits such as accrued vacation and paid time off, and other transition benefits to affected employees (Cavico & Mujtaba, 2013).

Arzuaga et al. (2021) found that affected employees experience a lack of control over their professional lives, uncertainty about their career path in the future, and higher degrees of stress and dissatisfaction. In fact, research shows that laid off employees could be without work for about 26 weeks (Mujtaba & Senathip, 2020). Hence, appropriate measures must be taken to make the transition into unemployment easier for affected employees.

Aside from the severance packages that are offered to affected employees, it is the HR department's responsibility to introduce outplacement strategies within the organization to help newly displaced employees recover. Outplacement is an HR initiative designed to help dismissed employees cope with the emotional strain of losing their jobs and to offer support for them to find new employment (Gómez-Mejia et al., 2016). While most outplacement activities are usually conducted by third-party consulting firms, the HR department must ensure that effective outplacement strategies exist and affected employees benefit from them. Gyurák et al. (2019) found that affected employees who just lost their earning security, a significant part of their living environment, and social interaction opportunities will appreciate the chance to be inspired and assisted in being oriented into this new phase.

Studies, however, show that outplacement programs are underutilized in businesses and that only a small percentage of redundant employees have received any kind of such program (Gyurák et al. 2019). The HR department can implement several outplacement initiatives like (a) providing emotional support through counseling services to help employees deal with the stress of job loss and (b) providing job-search assistance like resume writing or review, skill development in interviewing and salary negotiations, and career planning.

Conclusion

Change, although constant and inevitable, is often met with resistance. Downsizing is an organizational change initiative that is difficult to experience. This study sought to examine the increasing layoff and hiring freeze wave in the United States and the role of the HR department in managing the organizational downsizing change process.

While downsizing and layoffs may be unavoidable for organizations in the USA for the remainder of 2022, it is the responsibility of all affected organizations' HR departments to develop effective layoff management strategies for both affected and surviving employees.

The HR department has the responsibility of working closely with line managers and other company executives to help surviving employees remain motivated, regain organizational identity, and understand their new functions and roles as part of the organization's future. On the other hand, through the implementation of outplacement strategies, the department can mitigate the risks of negative publicity caused by the layoffs, improve affected employees' transition into the labor market; and demonstrate to affected employees that their contributions to the organization were not unappreciated. It is recommended that the HR department maintain a positive relationship with affected employees and treat them as potential future rehires or referrals. Overall, in this era of impending recession and inflation, HR experts can highlight their value to the organization's overall strategic direction by managing, leading, and putting layoff policies into practice effectively.

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Profitability Analysis of the Straddle Strategy in Trading One-Month Options

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Note: As this author passed away prior to the editing stage of this manuscript, this article is, in his memory, being published in its original form.

ABSTRACT

The most important consideration when trading securities is when to liquidate and, in the case of the straddle approach, how much capital is required to cover the initial premium cost. Clearly, the unrealized profit or loss of any straddle position depends on the intrinsic and extrinsic values of the options that comprise the arrangement. This research aims to identify the characteristics that impact the profitability of options when using the straddle strategy. One-month options on Apple shares were examined for this research, specifically those for which the strike price was equal to the market price at initiation. This study discusses when the upper limit on the rate of return of a straddle is reached, allowing the owner to liquidate. The main question is what the limit should be to ascertain best profitability for the trader in the long run. This study answers this question by estimating the long-term profitability for different values of the point at which liquidation is possible. A statistical comparison of the prices of the underlying asset both at initiation and expiry is also included in this research. Undeniably, the volatility of the underlying asset affects the profitability of the straddle strategy. Future studies should assess how the underlying asset's volatility influences the profitability of the straddle.

Keywords: Straddle, option trading strategies, put option, call option, security market

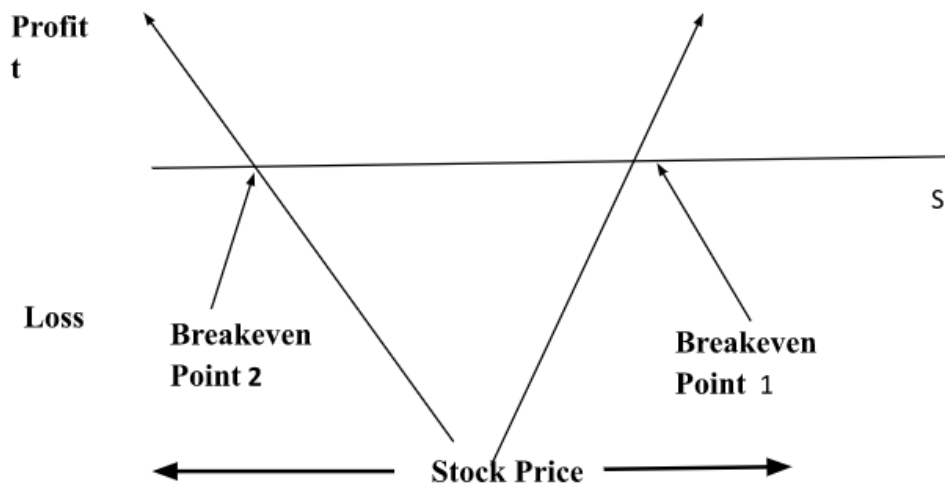
Profitability Analysis of the Straddle Strategy in Trading One-Month Options

Earning profit by trading options on securities is a common practice. One strategy in trading options is to form a long straddle, a combination of buying a call option and a put option on an underlying security, both of which have the same expiry date. (Cohen, 2013). In particular, investors who use the straddle

strategy often set the strike price of both options to be equal to the market price of the underlying security at initiation. These practices are the focus of this study. Figure 1 shows the return of a long straddle as a function of the underlying asset's market price at liquidation. The lines in this graph have slopes of -1 and 1, respectively, and the minimum return is the loss of the premium.

Figure 1

Return of the Long Straddle



There have been several statistical studies analyzing the profitability of the straddle strategy for various underlying assets. Chong (2004) considered the profitability of long straddles on the GBP/DEM and JPY/DEM currency exchanges, noting high returns if these positions are based on volatility forecasts using moving averages. Guo (2000) addressed the profitability of long straddles on several currency exchanges and concluded that these straddles yield significant positive profits in absence of transaction costs, regardless of the volatility of the underlying assets. Furthermore, low correlation between a straddle and many other major assets was observed, making this practice a good strategy for achieving 'market neutrality' in one's portfolio. Abdullozoda (2018) analyzed the profitability of long straddles based on two-and-a-half month options on Apple shares issued between December 2010 and February 2018. It was found that if liquidation is achieved while also attaining a suitable limit on the profit, then, on average, these straddles are worthwhile investments. The research presented in this article follows Abdullozoda's (2018) approach but is based on non-time-overlapping, one-month options on Apple shares issued between 2018 and 2021.

The daily options price data used in this study was obtained from Cboe (n.d.). As mentioned above, the data was used to construct straddles that had strike prices equal to the price of their underlying assets at

formation. It was assumed that all positions were formed at the time the calls and puts were issued. Moreover, it was assumed that a position could be liquidated any day before the expiry. Ideally, liquidation would be *at expiry*—if not before. Liquidation could occur either by exercising the options or selling them at the market price. It turned out, for all straddles, it is preferable to sell the options at the market price. Naturally, at expiry, there is no difference between the two.

The objective of this research is to analyze how variations in price of underlying assets affects straddles, from formation to expiry. This comparison is done in terms of the ratio

$$\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}$$

The motive for this objective is to find whether, on average, the underlying price at expiration tends toward the positive or negative direction. This objective is formulated in terms of the following two research questions.

Research Question 1: Is the distribution of the natural logarithm of the ratio mentioned above normal? That is,

$$\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right) \sim N(0, \sigma)$$

Research Question 2 is implicitly stated in the latter equation and is formulated as follows.

Research Question 2: Is the expected value of the variable in Research Question 1 equal to 0? That is,

$$E\left(\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)\right) = 0$$

The reason for using the logarithm is to allow infinite range on both sides of neutrality, namely

$$\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right) = 0 \leftrightarrow \frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}} = 1$$

Research Question 1 seeks to find whether the distribution

$$\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)$$

has the same symmetry as the normal distribution. Research Question 2 seeks to find whether the center of the aforementioned distribution is at neutrality.

In liquidating the straddles, the following strategy was used. If the rate of return of the straddle equaled or exceeded a preset limit, then the straddle was liquidated; otherwise, liquidation was done at expiry. To analyze the profitability of the straddles, different values for the preset limit were chosen, and the mean of the rate of return for each value of the limit was estimated. Attempting to determine the overall profitability of the straddle strategy suggests a third research question.

Research Question 3: What value of the preset limit mentioned above maximizes the mean of the rate of return of the straddles, and what is this maximum mean?

The hypotheses associated with research questions 1 and 2 are formulated as follows.

H_{1n}: The distribution of $\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)$ is normal

H_{1a}: The distribution of $\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)$ is not normal

H_{2n}: $E\left(\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)\right) = 0$

H_{2a}: $E\left(\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)\right) \neq 0$

The Author's Method

In testing the hypotheses associated with Research Questions 1 and 2, the probability of type 1 error, α , was taken to be 0.05, as it is the common choice in social and business research. A chi-squared goodness of fit test was used to test the hypothesis associated with Research Question 1. To test the hypothesis

associated with Research Question 2, a t-test was performed on the mean of the variable. This is justified since the underlying variable has a normal distribution.

46 one-month straddles were formed based on the historical data obtained for the years 2018 through 2021. Daily rate of return was calculated for each straddle, after which the liquidation strategy mentioned above was applied. Finally, the rate of return of each straddle was calculated based on the value of the preset limit. Note that some rates of return were positive, and some were negative. Naturally, the rate of return of each straddle depended on the choice of the preset limit. Consequently, the mean of the rate of return for each preset limit was estimated by summing all rates of return and then dividing this value by the number of straddles.

Results

As mentioned above, based on the obtained historical data, 46 straddles were created on the option's issuance date. If an exact match was not possible, the strike price of each straddle was assumed to be closest to the price of the underlying asset at formation. All pertinent statistical data can be found in Table 1 below.

Table 1

Descriptive Statistics of

$$\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)$$

Mean	0.024603737
Standard Error	0.014756256
Median	0.055712499
Mode	#N/A
Standard Deviation	0.1000818
Sample Variance	0.010016367
Kurtosis	-0.131149637
Skewness	-0.79354646
Range	0.392786329
Minimum	-0.218776969
Maximum	0.174009359
Sum	1.131771908
Count	46

A histogram of

$$\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)$$

can be found in Figure 2 below. Normalized values of

$$\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)$$

are given in Table 2. The histogram of these normalized values is presented in Figure 3. As observed, both histograms indicate that the two sides of the neutrality,

$$\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right) = 0,$$

have approximately equal accumulation of frequency.

Figure 2

Histogram of

$$\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)$$

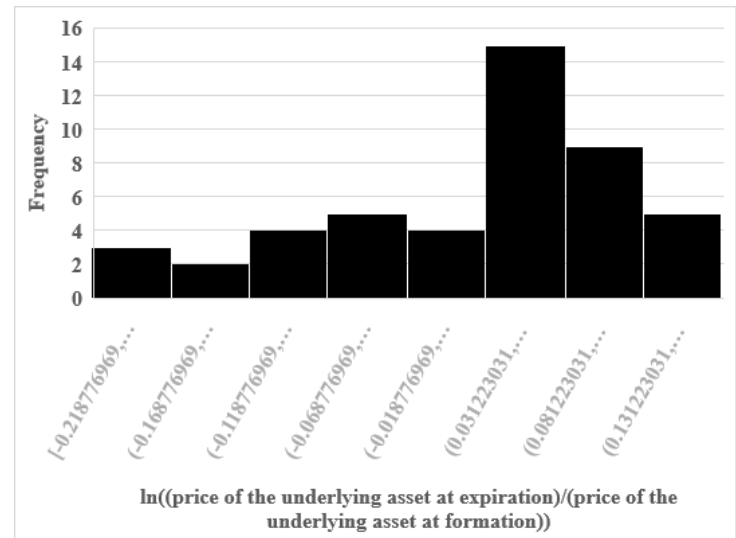


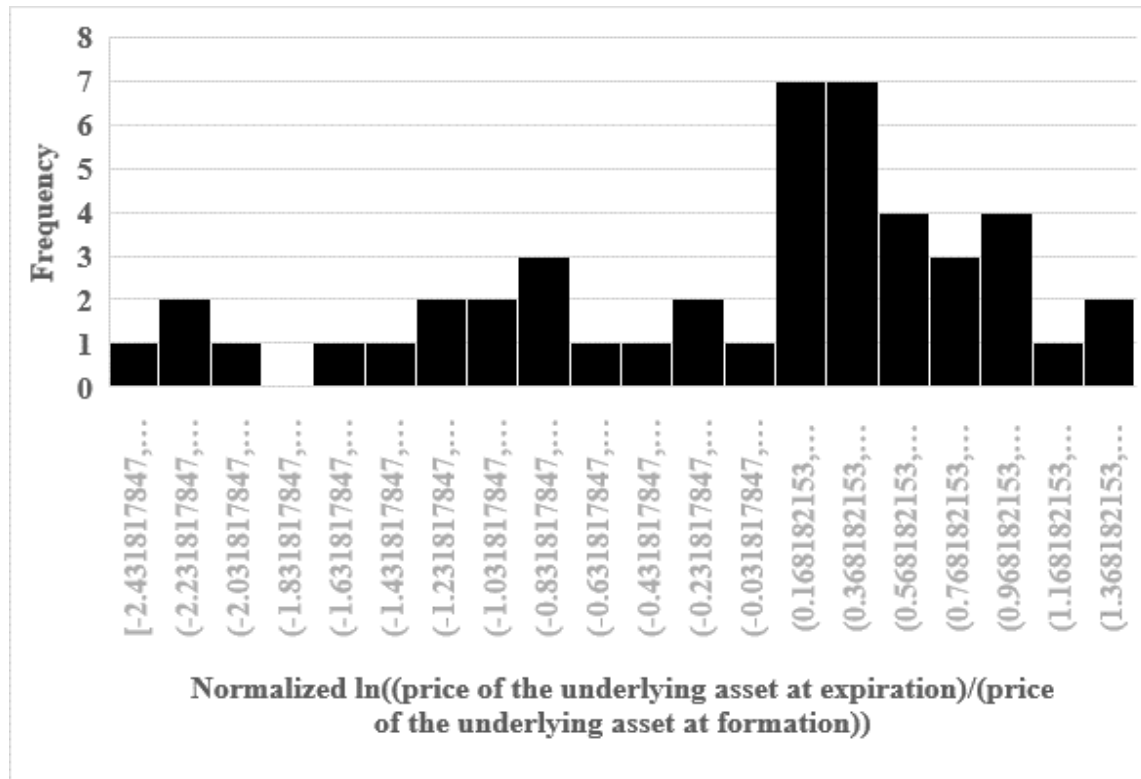
Table 2

$\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)$ and the Respective Normalized Values

Straddle	Value	Normalized value	Straddle	Value	Normalized value
1	-0.091937921	-1.164464054	24	0.118490873	0.938103992
2	0.04691692	0.222949455	25	0.061416273	0.367824482
3	-0.04917127	-0.737147087	26	-0.127545601	-1.520249823
4	0.086225557	0.61571455	27	-0.218776969	-2.431817847
5	0.032579282	0.079690263	28	0.173952015	1.492262117
6	-0.024960658	-0.495238851	29	0.125243596	1.005576031
7	0.104718152	0.80048935	30	0.129727347	1.050376893
8	0.06532708	0.406900585	31	0.174009359	1.492835092
9	-0.011305154	-0.358795415	32	0.138059504	1.133630365
10	-0.096342504	-1.208473885	33	-0.164522034	-1.889711935
11	-0.182084548	-2.065193531	34	0.017471787	-0.071261208
12	-0.044343623	-0.688910072	35	0.043428703	0.188095794
13	0.143204977	1.185043035	36	0.06222908	0.375945911
14	0.043603797	0.189845311	37	0.053846981	0.292193428
15	0.115090423	0.904127292	38	-0.109698917	-1.341928853
16	0.090992048	0.663340495	39	-0.039089019	-0.636406984
17	-0.188458126	-2.12887722	40	0.072100455	0.474578975
18	0.136530252	1.118350343	41	-0.058849639	-0.833851676
19	0.0088929	-0.156979964	42	0.063652705	0.390170518
20	0.094855929	0.70194773	43	0.057578016	0.329473283
21	0.088468222	0.638122868	44	-0.069431925	-0.939588041
22	0.071958079	0.47315638	45	0.065049969	0.404131746
23	0.051343877	0.267182842	46	0.071325656	0.46683732

Figure 3

Histogram of Normalized Values



Research Question 1

To test Research Question 1, the domain of the variable

$$\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)$$

was divided into intervals, and in each interval the frequencies of the observed normalized values were compared with the expected frequencies of the standard normal variable. These comparisons are shown in Table 3.

Hypothesis 1 was tested using the following calculation:

$$\text{test statistic} = \frac{(3-1.04650607)^2}{1.04650607} + \frac{(5-6.251635611)^2}{6.251635611} +$$

$$\frac{(9-15.70185832)^2}{15.70185832} + \frac{(22-15.70185832)^2}{15.70185832} + \frac{(7-6.251635611)^2}{6.251635611} + \frac{(0-1.04650607)^2}{1.04650607} = 10.41995003$$

The value of the test statistic was found to be less than the critical five-degrees-of-freedom chi-squared value, 11.07049769. Therefore, the researcher cannot reject Null Hypothesis 1. It is reasonable to assume that the distribution of

$$\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)$$

is normal. Table 3 juxtaposes the expected with the observed frequencies.

Table 3*Observed Frequencies with Expected Frequencies*

	Expected frequencies	Observed frequencies	expected-observed ² expected
Less than - 2	1.04650607	3	3.646551747
Between -2 and -1	6.251635611	5	0.250589094
Between -1 and 0	15.70185832	9	2.860483391
Between 0 and 1	15.70185832	22	2.526235292
Between 1 and 2	6.251635611	7	0.089584437
Greater than 2	1.04650607	0	1.04650607

Research Question 2

The t-statistic to test Hypothesis 2 was evaluated as follows:

$$\frac{0.024604}{0.014756} = 1.667343$$

The rejection region for this test based on a t-distribution with 45 degrees of freedom is $(-\infty, -2.014103) \cup (2.014103, \infty)$. The test statistic is not in the rejection region; therefore, the researcher cannot reject Null Hypothesis 2. It is reasonable, then, to assume that

$$E\left(\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)\right) = 0.$$

Research Question 3

As mentioned, this study used a sample size of 46 straddles. A straddle was liquidated if the rate of return on that day met or exceeded the preset limit; otherwise, it was liquidated on expiry. Naturally, the number of straddles liquidated prior to expiry decreases when the preset limit is increased. Consequently, for a particular limit, the estimate of the mean of the rate of return of the straddles was computed by dividing the sum of all rates of return by the total number of straddles. Table 4 shows the decrease in liquidations prior to expiry as well as variations in the average rate of return as the preset limit is increased. Figure 4 shows how, as the number of liquidations is decreased, the preset limit is increased. Figure 5 shows the dependence of the average rate of return of the straddles on the preset limit for liquidation.

Table 4*Dependence on the Number of Straddles Liquidated Prior to Expiry and the Average Rate of Return on the Preset Limit*

Limit on the rate of return	Number of straddles terminated before expiration	Average rate of return
0	45	0.130881759
0.1	43	0.230821421
0.2	40	0.308351459
0.3	35	0.37484037
0.4	33	0.451825592
0.5	30	0.440749051
0.6	24	0.413644344
0.7	21	0.442412771
0.8	18	0.458534611
0.9	15	0.48339685
1	15	0.500472381
1.1	14	0.500881641
1.2	12	0.462658218
1.3	9	0.441732132
1.4	9	0.475617371
1.5	7	0.485576178
1.6	6	0.485576178
1.7	6	0.485576178
1.8	6	0.485576178
1.9	5	0.448941017
2	5	0.448941017
2.1	2	0.400526714
2.2	1	0.356630043
2.3	1	0.362993293
2.4	1	0.362993293
2.5	1	0.362993293
2.6	1	0.372266132
2.7	1	0.372266132
2.8	1	0.372266132
2.9	1	0.372266132
3.1	1	0.374560686
3.2	0	0.375554205
3.3	0	0.375554205
3.4	0	0.375554205
3.6	0	0.375554205
3.7	0	0.375554205
3.8	0	0.375554205
3.9	0	0.375554205

Figure 4

Decrease in the Number of Liquidations as the Preset Limit is Increased

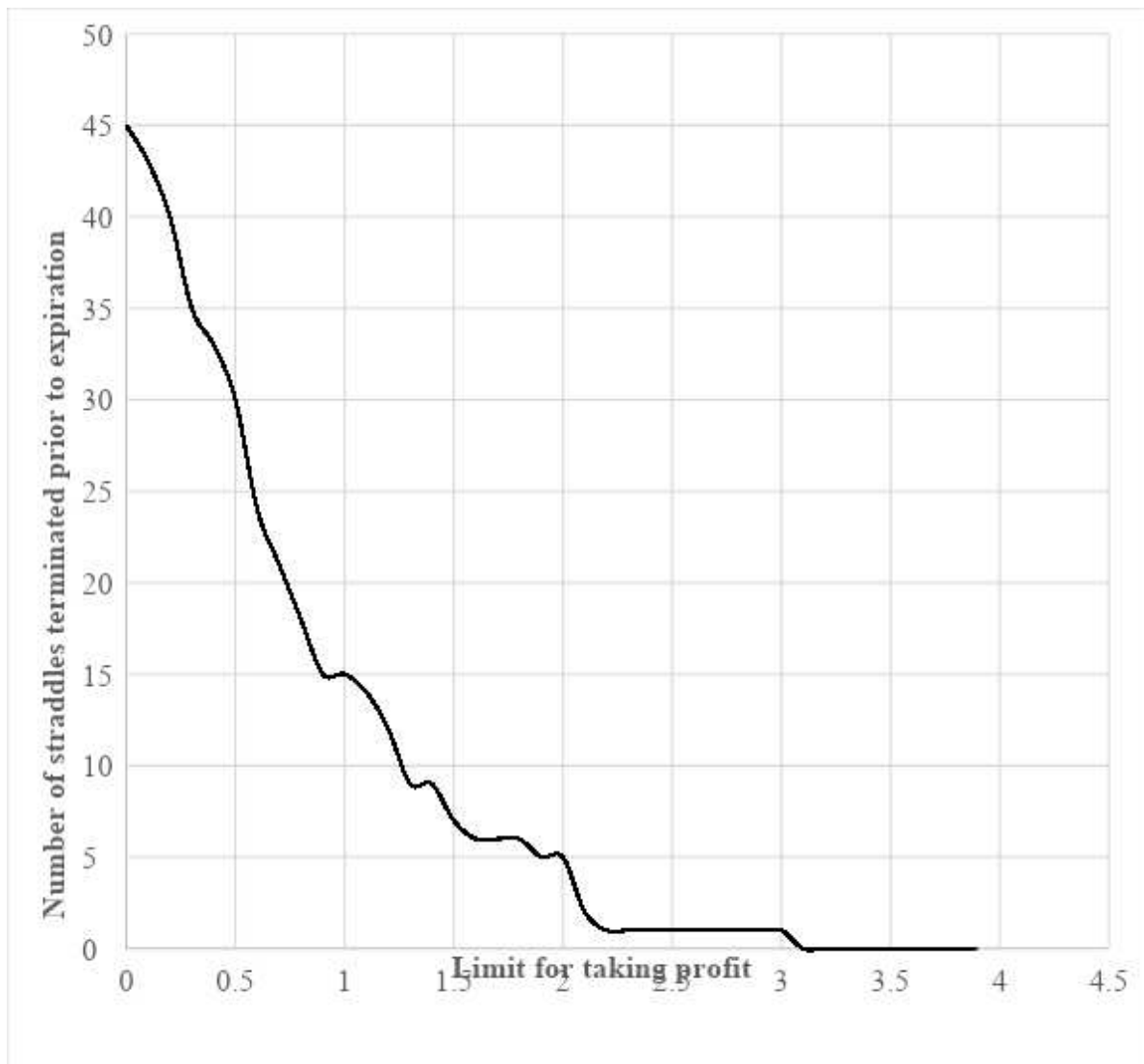
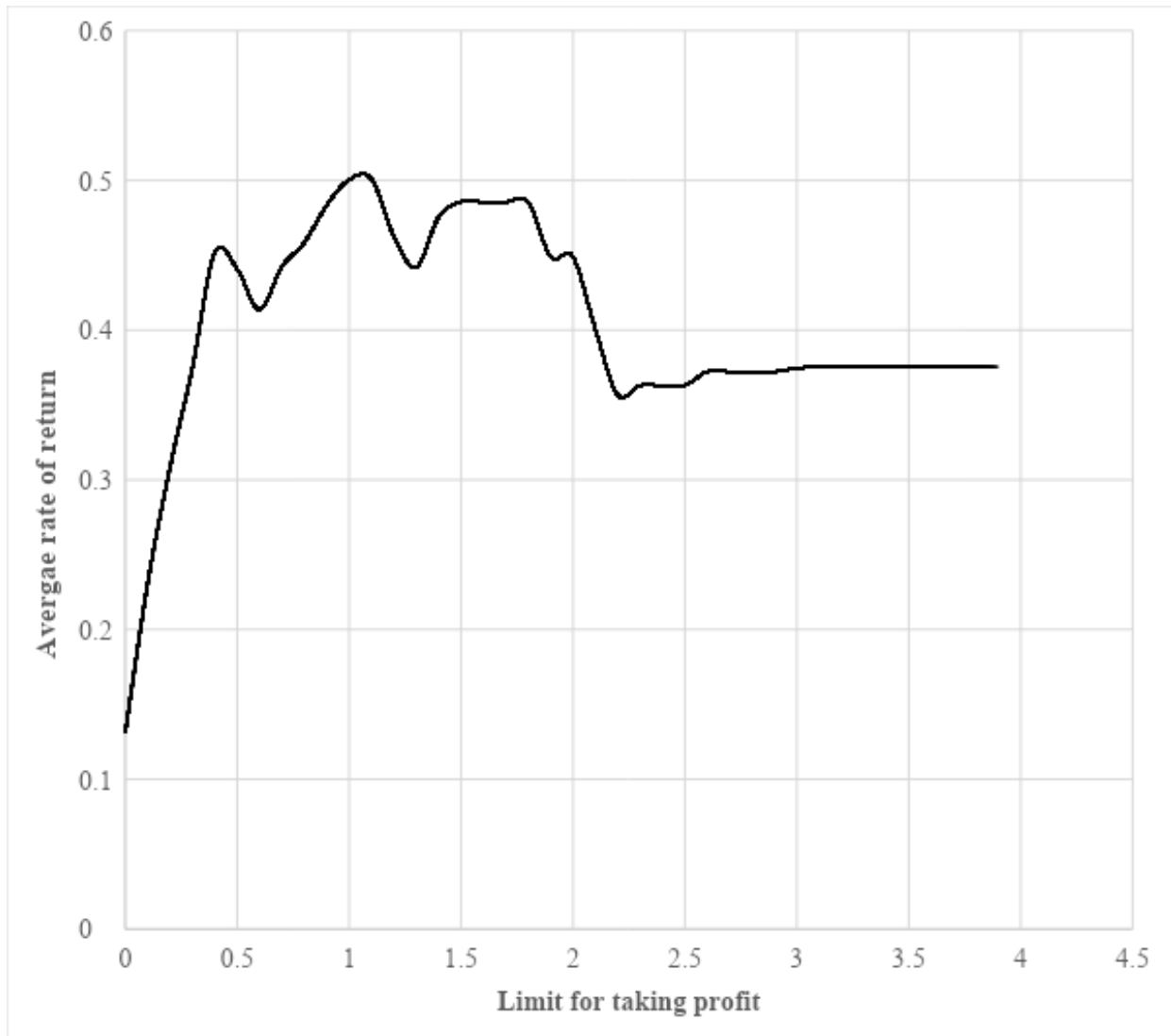


Figure 5

Dependence of the Average Rate of Return on the Preset Limit



Discussion/Implications

The analysis in this research indicates that it is reasonable to assume the distribution of

$$\ln\left(\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}\right)$$

is normal for one-month straddles of Apple options and that the mean of this distribution is 0. This assertion is equivalent to stating that on average the ratio

$$\frac{\text{price of the underlying asset at expiration}}{\text{price of the underlying asset at formation}}$$

is equally inclined to be less than 1 or greater than 1. The latter statement is synonymous with saying that the average of the above fraction is at neutrality.

Furthermore, the results in this research indicate that trading one-month Apple options based on long straddles can be profitable, particularly if the limit for liquidation is set at 1.9. The latter limit yields a mean rate of return of 0.448941017.

Abdullozoda (2018) performed a study similar to the research presented in this article. The long straddle formation and liquidation are identical in the two studies. One difference is that Abdullozoda's (2018) research was based on two-and-a-half-month options on Apple shares. However, the findings of both studies are very similar. Namely, Abdullozoda (2018) could not reject the null hypothesis that the difference between the distributions of final underlying price and initial underlying price is normal and that the mean of these deviations is 0. Furthermore, he concluded that liquidating the straddle once a limit on the rate of return is achieved or exceeded yields a positive overall mean for the rate of return. Despite the similarities mentioned above, there is a stark difference between the results in the research presented in this article and the outcomes of Abdullozoda's (2018) study. It seems that trading one-month options using the straddle strategy yields a significantly higher mean of the rate of return when the limit is set at the optimal value. Using the straddle strategy for one-month options, which denotes a comparatively shorter investment period, provides a mean rate of return above 44%. The mean rate of return for two-and-a-half-month options was slightly above 25%. It is left to future researchers to investigate why, when using the straddle strategy, one-

month options perform better than two-and-a-half-month options.

Conclusion

This research concludes that the long straddle strategy in trading one-month Apple options can be profitable. Furthermore, through the duration of these straddles, the average of the ratio between the underlying price at expiration to the underlying price at formation is at neutrality. Effectively, this means that one cannot bet on the rise or decline of the underlying price through one-month periods. This neutrality lends credence to the contention that Apple shares, at least on the surface, "randomly walk." Such corroboration of the behavior of other securities, and even market indices, is demonstrated in other studies (Solnik, 1973). Any successful prediction of price movement in any direction should be based on in-depth forecasting.

The findings of this study are worth further investigation. Suggested areas include (1) the influence of an underlying asset's volatility on the profitability of a long straddle, (2) the statistical properties of liquidation time and rate of return per unit time, and (3) extrapolating the principles and methods contained herein to straddles exceeding two and a half months.

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Negotiating Blackness in White Germany

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ABSTRACT

German ethnicity and nationality have been historically linked together and viewed as "natural". Minorities in Germany have navigated cultural and ethnic differences and national belonging in a variety of ways. Black Germans are one example of a minority that has a long historical presence in Germany but have been kept at arm's length by the majority White population--denied national belonging and association as Germans. A movement to establish group agency that began with Audre Lorde's visit in the 1980s began by negotiating the black German identity with the term "Afro-Deutsch". This process of negotiating a black identity in a dominant white culture continues to this day, with "black" becoming an increasingly prevalent designation that is both political and contains the potential to unify a far greater community than just Germans with African heritage.

Keywords: Afro-German, black Europe, diaspora, identity formation, ethnicity

People of African descent in Germany suffer racial discrimination, Afrophobia and racial profiling in their daily lives, but their situation remains largely invisible to the wider society. [...] There is a serious lack of ethnicity-based disaggregated data, and an incomplete understanding of history, which obscure the magnitude of structural and institutional racism people of African descent face. (United Nations, 2017a, para. 1)

Negotiating Blackness in White Germany

In 2002, the United Nations Human Rights Office of the High Commissioner instituted the Working Group of Experts on People of African Descent, tasking the team with conducting country visits to collect data and monitor the living conditions of people of African descent (United Nations, 2017a). (A tertiary point of interest is the presence of Franz Fanon's daughter on this committee.) The report on the daily occurrence of racism and discrimination found in Germany by the Working Group stands in tension with the national narrative of *Toleranz* (tolerance) and the *Multikulti* (short for multiculturalism). Multiculturalism was introduced to encourage guest workers to settle permanently in the country, policy leaders claiming that foreign cultures are able to find a place in Germany and obtain full integration in society (*Is multi-kulti dead?*, 2010). As will be discussed later, a major problem with the *Multikulti* in practice is that existence and integration in German society is

only acceptable if one remains postured as the "other" in relation to white Germans.

Because the color of one's skin is the first indicator of one's nationality in the German eye, German-born people of color find themselves subsumed into the category of "immigrant," along with every stereotype and bias that accompanies it. This improper understanding, resulting in widespread systemic discrimination on every level of society, is due to the misconception that the German nationality automatically implies white skin. One such German-born minority group is black Germans. Though referenced by varying monikers across discourses, the term 'black Germans' will be used here to refer to people born in Germany who are of African descent. In the context of widespread xenophobia, fear and a continued othering of the foreigner against the biologically (and culturally) "pure" German, those born in Germany whose native language is German and who have no other cultural anchors or references yet fall outside of the "pure" German

racial construction find themselves again existing in a liminal space.

The aim of this paper is to explore a number of cultural forms to examine how the identity formation of German citizens of African descent has changed. Identity formation negotiations can be traced through social clubs as well as through cultural forms such as social media, vlogs, mass media production, theater and music. The younger generation is looking to further renegotiate the terms of their racial identity to reflect their identification culturally as German while accounting for the perceived “otherness” of their skin color. I will explore where and how this (re)negotiation of racial identity takes place in the context of increasing xenophobia, arguing that 2016 was a significant year in moving toward embracing *schwarz* (black) as a dominant expression of racial identity for black Germans.

German National Identity

National identity formation in Germany is deeply rooted in history. What constituted Germanic regions was a matter of debate and negotiation for a long period, with each inclusion decided on a case-by-case basis (Scales, 2012). The ultimate unification of a “single German people” was at the urging of the Italians, who encouraged the leaders of the German lands to adopt the concept in an effort to provide strong leadership (Scales, 2012). As Germany grew into its existence as a nation state, a cultural cohesion, known as the *Kulturnation* (culture nation), grew.

Nazism reached back into history to capitalize on this notion of *Kulturnation*. The Third Reich placed Jazz music in opposition to classical artists, claiming it was linked to the “Jewish Menace” (Schroer, 2007). At the end of the war, when Nazism’s ideology of achieving a pure Aryan race was delegitimized, the notion of a pure ethnic nation was continued but in a much broader sense, largely based upon conceptions imparted by the Allied occupying powers. As the United States was tasked with leading the Germans out of Nazi racist ideology, it had to defend its own hypocritical practices of segregation and Jim Crow laws (Schroer, 2007). Knowing that complete extirpation of racist ideology was nigh impossible, the solution was to hold the United States up as a model for “equitable treatment for racial minorities,”

convincing the Germans that African Americans were well integrated into U.S. society (Schroer, 2007, p. 37). The broader definition of whiteness, based upon the model of the Allied powers, emphasized a quality that African Americans lacked, working to unite Germans with the other white powers while also “reinforcing the division between Germans and blacks” (Schroer, 2007, p. 5, 33). The concepts of homogenous ethnicity and common language and culture still define German citizenship through imagination and the policy of *jus sanguinis* (Finzsch & Schirmer, 1998).

(National) Identities of Blacks in Germany

Identity for non-white Germans as a whole, and Germans of African descent in particular, has historically been defined by external sources. The term *Neger* (equivalent to the English “Negro”) came into usage during Germany’s colonial foray in Africa. It was during this brutal period of “colonial exploitation, enslavement, and domination, [that] the term *Neger* became an especially negative epithet” (Blackshire-Belay, 1996, p. 97). Though still occasionally used by people of older generations, its usage has been generally eradicated in everyday German conversation as it has been deemed taboo. As discussed previously, *Mischling* (literally translated “mixed” or “half-breed”) became popular during and after World War II. It also remains common to refer to black Germans as *farbig* (colored) or *braun* (brown). Both the terms *schwarz* (black) and *dunkelhäutig* (dark skinned) are used to differentiate black Germans from those with darker skin tones, indicating that they perhaps do not have a German parent. According to Wright (2004), “For brown skin, the German language only has terms borrowed from eating and drinking, like ‘chocolate brown’ or ‘coffee brown.’” What becomes clear is that these adjectives are highly subjective and highly sensitive. Each person has his/her own relationship to each adjective based upon their own individual biography.

Being the holder of a German passport and citizenship, being socialized in Germany, or speaking German as a mother tongue does not prevent one German from identifying and categorizing another German based on their skin color. Questions of identity and national identity arise. That national identity is intrinsically linked to race (or one’s understanding of race). There exists a barrier for white Germans to

conceive of people of color as also being German in a true sense. It is common to overhear white Germans constantly questioning the origin of a person of color. The conversation usually goes something like this:

German: Where are you from?

Black German: From Sachsen.

German: Yeah, okay, but where are you really from?

Black German: Dresden.

German: Yeah, but where are your parents really from?

Black Germans as a minority group are largely invisible. Much of the German population is unaware that people of African descent have lived in Germany for centuries and have no cultural or linguistic connection to Africa. This invisibility has perpetuated systemic racism and discrimination. Recognition as a native minority group has been complicated by the arrival of many African immigrants (as a result of the current refugee “crisis”). As a result of this influx, there are now two very distinct populations that are conflated based upon the color of their skin. Due to the cultural understanding that racism is overt in nature, much racism is unacknowledged and rendered invisible, except to those who experience it. Black Germans remain labeled as foreign, despite their rooted lives on German soil. Possibly the most difficult aspect to defeating *Alltagsrassismus* (everyday racism) is the continued refusal to recognize black Germans as a minority group suffering discrimination. A major reason for the continued lack of recognition is simply the lack of data past the second generation. Statistics on black citizens were stopped in the 1960s when protests were expressed on the basis that Germany’s Basic Law deems it illegal to single out people on the basis of race (Fehrenbach, 2006). In addition, since 2005, Germany has maintained no government records of its citizens’ (or residents’) countries of origin (United Nations, 2017b). Black Germans are therefore found in the same broad category as newly arrived immigrants as well as long-term residents of Germany (perhaps even since birth) who do not hold German citizenship.

It was not until the 1980s that a shift in identity formation occurred. The publication of *Farbe Bekennen: Afro-deutsche Frauen auf den*

Spuren ihrer Geschichte (Showing Our Colors: Afro-German Women Speak Out) in 1986 was a turning point for the black population in Germany. This collection of personal experiences written by women introduced the term for identification, *Afro-deutsch*, which took inspiration from the term Afro-American (Blackshire-Belay, 2001). *Afro-deutsch* as an identifier marked the first time that the black population had set out to self-determine their identification. *Afro-deutsch* expressed the hitherto unexpressed reality that a person can be both African and German. By claiming to be *Afro-deutsch*, one aligned oneself with the political agenda it was developing. Propelled by black German feminists and inspired by American writer and activist Audre Lorde, *Die Initiative Schwarzer Menschen Deutschland* (Initiative of Black People in Germany) (ISD) was founded contemporaneously (DW Deutsch, 2017). The association was formed in an effort to provide a space for black Germans to meet, share experiences, and find political agency to combat discrimination and racism. ISD also provided a space to explore *Afro-deutsch* as a political identity (ISD, 2014). *Afro-deutsch* is not recognized, however, by the German government as officially identifying an ethnic minority.

To this day, national identity for non-white Germans remains a space of negotiation. Outside of the term “Afrodeutsch,” the German language does not offer a term equivalent to the American racial labels “black” or “African American.” Racial labels are subjectively determined largely on an individual basis and can prove fluid over time. As the size of the non-white German population increases, the waters of national identity are muddled. However, what of the majority white German population whose national identity is still rooted in homogenous ethnicity and common language and culture? How has the changing demographics drawn them into the discourse? It is becoming increasingly difficult to deny “German-ness” to passport holders, and the question of what being German means is currently being renegotiated. As this re-negotiation takes place, white Germans are referring to themselves as *Bio-deutsch* (organic German), retaining a claim of authenticity and continuing to root the idea of German-ness in the body as a state of nature (*Name, data of birth, migration background*, 2016).

In an essay recounting her oral history project with African-Germans in 1992, Tina

Campt (2005) relates a respondent's intentional paralleling of his African-German experience to her own experience as an African American. The respondent referenced the African-American experience in multiple layers, first by drawing the parallel between African-German and African-American experience with interracial marriage and then further by making a comment to Campt (2005) that required her to "draw on [her] cultural knowledge as an African American to answer the question [she] had just posed" (Campt, 2005, p. 76). Campt (2005) understood her interviewee's strategies of reaching into the African-American experience as a means to bridge a "discursive gap" in the layered identity of German-ness and blackness (p. 77). In blogs, vlogs and interviews, black Germans regularly reference African-American history and language. Most notable is the tentative assertion that a Black German is *schwarz*. This declaration is significant because the adjective stands alone. When *schwarz* stands alone, it becomes a noun, yet it has yet to be formalized as a noun by capitalization. (This is significant since in German all nouns are capitalized.) When a black German says that s/he is *schwarz*, the American black community is automatically called to mind. Current commentary referencing the African-American community and experience is also careful to acknowledge the great distinction in historical contexts. When drawing parallels, it is possible to recognize both legitimate commonalities and discursive gaps. Distinctions between black Americans and black Germans found while comparing compound the reality that distinctions between black Germans are also significant:

[R]ace and racial difference are products of social interaction and interpretation, and [...] those interactions occur not just in Germany between whites and blacks, and not only during the war, when race in Germany was an individual's defining feature. They also occur among Blacks from different social and national contexts in our contemporary transnational encounters. (Campt, 2005, p. 196)

Black Germans are socialized in various parts of Germany, all of which have distinct regional characters. Bridging internal distinctions is

perhaps assisted by drawing upon the identity and experiences of other significant African diasporic communities. In *There Ain't No Black in the Union Jack*, Paul Gilroy (2002) confirms, "In particular, the culture and politics of black America and the Caribbean have become raw materials for creative processes which redefine what it means to be black, adapting it to distinctive ... experiences and meanings. Black culture is actively made and remade" (p. 202). Black Germans are in the midst of this creative process.

Identity Negotiations

In an attempt to trace this space of identity negotiation, I will examine vlogs, TV interviews and three of the most recent hip-hop songs produced in Germany.

Video Blogs (Vlogs)

The vlogs examined were all self-reportedly aberrant from the usual videos produced and manifested the various identity formation issues previously discussed. Frustration and dismay are prominent emotions present in both of the following examples, as well as in many other videos. The videos act as a space of negation, facilitating a sort of dialogue between people of color. Each vlogger references comments or face-to-face conversations in which issues of identity are discussed.

The first case, Aminata Belli (Aimee), is a prolific vlogger and views this form of media as a platform for exchanging viewpoints, experiences, and knowledge, especially since most black Germans (herself included) do not have parents who understand what it is like to be mixed (*gemischt*). Deviating from her usual hair and beauty tips, she attempts to discuss her racial identity. She lacks exact language and fumbles through a string of descriptors: "identity," "what would you call me?," and "race in the English sense." She found it difficult to express even what the topic of her video was: "I do not know at all what to call it."¹ A professor's suggestion that she combine her research paper on beauty for "blacks" or "half-blacks" with an ethnological aspect or "African-trend" analysis prompted Aimee to reflect further, though not in the direction her professor intended. She viewed the suggestion as offensive: "My looks have

¹ "Ich kann's gar nicht benennen."

nothing to do with ethnology or African trends and [...] this is simply not what it should be.”²

Aimee discusses the different opinions held by black Germans about the words used to describe them, acknowledging in true *Toleranz* language that each must decide for themselves. She abhors the term *mulatta* but recognizes that some would prefer it to *farbig* (colored). She also expresses dislike for food-related descriptors like “cappuccino” or “schoki/schoko” (a diminutive of chocolate), though admits that some black Germans she speaks with voluntarily use these terms to describe themselves. Her relationship to the term *Afro-deutsch* is tense. She admits to having to make use of it to negotiate her daily realities but rejects it on a personal level: “I hate the label *Afro-deutsch* but unfortunately do not know what it could [otherwise] officially be.”³ Aimee talks through her relationship with the term, sometimes apologizing for the personal nature of the topic. The reminder that getting too personal outside of one’s family or closest friends is taboo adds another layer to the in-between-ness of being a black German. How does a person speak of what needs to change on a societal level for the sake of humanness when the very personal nature of said conversation is itself taboo? Aimee finds that *Afro-deutsch* does not fit her situation because it, by definition, means that the person comes first from Africa and then Germany. There is a hierarchy to the label. She protests that she is not from Africa, then acquiesces that through her father’s heritage, she is “officially,” using air quotes as she says it, from Africa, but since she herself did not immigrate, she only has a migration background per the legal categorization. Aimee does not identify with *Afro-deutsch* because it is Africa-bound. She considers herself German, not African. She experiences no identity crisis: “My roots are not in Gambia. My roots are here in Germany. My roots are in Schleswig-Holstein. This is my home. I feel at home here. I feel like a German woman. Completely.”⁴ She continues, “In truth I am totally white, totally German. No one sees

this because I look different.”⁵ Though she feels completely German, the difference in her physical appearance is not lost on her. She explains how she identifies through her skin color and hair because they differ from those of white Germans and Europeans and because these differences are a daily issue for her. It is this difference that defines her, not any connection to Africa. She had no contact with her father, his home country of Gambia, or the Gambian culture or language. Aimee reaches into the African-American experience to try a point of reference for her identity. She says she knows that if she were to go to America she would be considered black but is quick to point out that being black in America is different from being *schwarz* in Germany. She points out that the term is used to differentiate races in the United States, whereas in Germany, it is not understood as an identity but rather the literal color of one’s skin. She is forced to use the more established label *Afro-deutsch* because when she uses *schwarz*, people correct her, telling her that the color of her skin is brown (Belli, 2017).

The second example, Melanie Jefferson, a.k.a. MiszMelzCurlz, made her video entitled “Ich bin NICHT Schwarz?!?” (“I am NOT black?!?”) in response to the tremendous amount of feedback she received after posting a video about “what black people don’t like to hear.” Though a different subject matter and tone than she usually posts, she found this topic important to address. She reports having received a lot of comments from people telling her, “Du bist gar nicht schwarz. Du bist mittel.” (You are not at all black. You are [lit.] middle.) She appears indignant as she insists that people must simply accept that she is *schwarz* just as one accepts certain mathematical certainties and formulas. Her viewers sought to determine her identity, to pinpoint her blackness. She rejects this entirely:

But I am black. I was raised that way. I was raised with the knowledge that I am black. And just because people outside cannot understand

² “Mein Aussehen hat nichts mit Ethnologie oder Afrikatrend zu tun und das ist nicht was, und das ist einfach nicht was das sein soll.”

³ “Ich haße die Bezeichnung Afro-deutsch aber leider weiß nicht was offiziell sein könnte.”

⁴ “Meine Wurzeln sind nicht in Gambia. Meine Wurzeln sind hier in Deutschland. Meine Wurzeln

sind in Schleswig-Holstein. Das ist mein Heimat. Ich fühle mich hier zu Hause. Ich fühle mich wie eine deutsche Frau. Komplett.”

⁵ “In Wahrheit ich bin total weiß, total deutsch. Das sieht das doch keiner weil ich doch anderes aussehen.”

that or see it that way do not have the right to constantly tell another person, “You are not black.” “You are not white.” “You are not purple.” “You are not yellow.” Or whatever.⁶

Interviews

There have been a few independent television stations and journalists that have touched upon the issues faced by black Germans seeking to bring the presence and issues of racism to the surface. The black German journalist and YouTuber who led the charge was Jermain Raffington, who interviews black Germans across the country about what the German identity means to them. He seeks to establish “a new black self-consciousness that is filled with pride.”⁷ He was tired of being the object of the same clichés, finding it offensive. His conviction is that if the persistent racism and rigid racial categories are not addressed, nothing will change. He began his own TV station to change the situation that there were no black public figures for him to view as role models.

PULS is a program supported by *Puls*, an online broadcast for the youth generation in Bavaria. It seeks to report and investigate cultural movements, upcoming artists, and social figures. Kokutekeleza Musbeni (Koku), a singer from Bavaria, is a black German. She was one of the interviewees in *PULS*’ expose on black Germans. Koku is another example of the diversity of the black German community. She does not identify primarily according to her skin color but according to her regional identity as a Bavarian. In addition to being an advocate of the Natural Hair Movement, she is passionate about *Schwarze* (Blacks), standing up and taking pride in who they are. Koku uses her talents not just for her own success but to break white Germans out of their “in-the-box-thinking” (Rundfunk, 2013).

In March 2017, the Deutsche Welle produced a documentary about the history, presence and reality of black Germans called *Afro.Deutschland*. It follows Germany’s first black news anchor through the country to interview various significant *Afro-deutsche/black*

Germans as she tells her own story and experiences as an orphaned *Afro-deutsche* (DW Deutsch, 2017). The Deutsche Welle is not an alternative news station like the other programs that have thus far reported on the black community in Germany. Instead, the Deutsche Welle is Germany’s international broadcaster and receives its mandate from the 1960 Deutsche Welle Act (modified in 2005). Its mission is to “convey Germany as a nation rooted in European culture and as a liberal, democratic state based on the rule of law. DW is known for its in-depth, reliable news and information and promotes exchange and understanding between the world’s cultures and people” (Deutsche Welle, 2017, para. 5). The UN Working Group’s report filed in February, 2017, was the first official government-level recognition of the discrimination and racism existing for black Germans. Perhaps it is not insignificant that an official state broadcaster, albeit international, so timely produced a personal story-driven look at some very harsh realities that are not widely recognized. The Deutsche Welle might have enough sway with its reach and reputation to open the door for more mainstream networks to explore these themes.

Hip Hop/Rap Songs

Hip-hop and rap are just two genres that fall under what Germans call Black music. Also included are R&B, reggae, and house music. Despite its ambiguity, Black music is popular in Germany, an industry dominated by *Afro-deutsche/black* Germans. Rapper and music producer Sammy Deluxe states that, in the rap scene, he felt he had a “home court advantage” for the first time as a black German (DW Deutsch, 2017). African-American culture acts as a model for “first world black populations.” According to Camp (2005), “At the level of visual representation, black American music, in particular the proliferation of hip hop, house, funk, and R&B through the medium of music videos has made African-American style ... a focal point of identification for blacks in

⁶ “Ich bin sowohl Schwarz. Ich bin so erzogen worden. Ich bin aufgewachsen mit dem Wissen, dass ich schwarz bin. Und nur weil Menschen draußen dass nicht verstehen können oder nicht so sehen haben sie nicht das recht ständig bei jemandem

anderen zu kommentieren du bist nicht schwarz, du bist nicht weiß, du bist nicht lila, du bist nicht gelt, keine Ahnung.”

⁷ Eine neue schwarze Selbstverständnisse, was zeigt, dass es auch mit Stolz behaftet ist.”

Germany” (p. 77). Three songs produced by black Germans in 2016 demonstrated a decisive break with the term *Afro-deutsch*. Each song proclaims line after line: “Ich bin schwarz” (“I am black”). These songs echo the larger movement, however disjointed, to return to self-determined identification. The demonstrated resistance to being defined by white Germans is gaining speed.

The first song, “Ich bin schwarz”, is by rapper Nura in the group SIXTN. Nura’s song is filled with ironies and stereotypes of what white Germans believe to be true about black people in general. The official music video begins with a copyright warning screen typically of movie films that warns the viewer that “in the following scenes, many black people are shown. Nazis and other right-winged sympathizers are urgently dissuaded from watching the video” (SIXTN, 2016). If the sarcasm is not thick enough, the screen continues, “All chicken parts were anonymously sent to SIXTN” (SIXTN, 2016). Nura finds it better to speak to racism with humor, instead of “creating a Nazi-hate track.” She repeatedly says “Ich bin schwarz,” asserting her identity. “Ich bin schwarz” here serves both to proclaim and define an identity as well as to confront the white German listener.

Ah Nice (2016) is a young rapper who had lived in Germany for seven years at the time of his hit song’s release. As a refugee who quickly acquired German citizenship, he has faced a variety of issues which he specifies in his song. As a male, he brings a different viewpoint and set of experiences and stereotypes to the table. His narrative is quite different from most black Germans as he was born and raised in Africa. He is important to the conversation, however, because the number of Africans gaining German citizenship is increasing, and as a black public figure, he has great influence, especially on younger generations. His lyrics also play off of stereotypes and everyday interactions that tend to be irritating and offensive to black Germans.

Afro-Spartana, released by Leila Akinyi in 2016, is about being black in Germany. She talks about her identity as *schwarz*: “I was born this way. And I don’t plan to bleach myself or become white. I have to find a way to live. [...] Being black means nothing to me. I also do not see at all that I am black. [...] what I’ve often experienced is [that] I am reminded by others that I am black” (JUICE, 2016; MPMTV, 2017). Her message is for young black girls (and all

black women by extension) to love themselves as they are, to accept themselves as they are, without wanting to be white so badly that they resort to skin bleaching. She calls the idea of believing that a person is more beautiful when they are lighter-skinned “twisted” and “wrong” (MPMTV, 2017). Leila sports a large Afro hairdo in her video, recalling images of the Black Panthers. She named her song “Afro Spartana” because a Spartan is strong, courageous, and fights to the end. Leila regrets that it is taboo to talk about being black or about being different. She believes that by wrapping up the Spartan in the art of song, the fear of the powerful black woman is softened. She deals with similar stereotypes as those in the first two examples but reaches into the African-American “Black is Beautiful” Movement and into her Kenyan roots. Though Leila would most likely find common ground with those who identify as *Afro-deutsch*, she declares her blackness on almost every other line. Due to the language she invokes, there is a distinct feeling of black empowerment that is emitted through the combination of lyrics and melody.

Discussion

Black Germans recognize that importing the term “Black” is problematic due to a historical background and development that they cannot and will not claim. While openly borrowing language from the African-American experience and claims of racial identity, black Germans have remained constantly aware of the varied histories present in their communities. Changing the national narrative about what constitutes the citizenry of Germany is a struggle that a growing number of black Germans have undertaken. The ISD is still seeking to expand and is adapting to the new developments within the black community. The development of community identity is not one of the primary goals of the ISD, though they do offer a politics-centered one as a cohesive element for its members, offering those without a purpose or identity a home. This identity is still framed around Africa as a “homeland,” excluding those black Germans who have no connection to Africa. Though *Afro-deutsch*-centric, ISD has expanded the language on its website and documents to utilize *schwarz*. *Schwarz* is consistently used as an adjective as of 2016 instead of *Afro-deutsch*. Perhaps the most dynamic example of ISD’s incorporation of

schwarz is the theme of the black youth weekend retreat: #young#gifted#black. The advertisement card for the retreat reads, “Are you black? Of African descent? Afro-deutsch?” (ISD, 2017).

A common theme through the interviews and vlogs is a noticeable lack of black role models. Black Germans are making their way into the media industry, but progress is slow. The hip-hop scene is the one area dominated by black Germans and others of African descent that stretches across national borders. Most people who use *schwarz* instead of *Afro-deutsch* expressed frustration at not being able to fully identify with any one label. This shift in identity terms is a reaction and rebellion against the larger societal struggle to adjust to an ever-increasing multicultural society in which definitions and perceptions of race are historically rooted and remain quite rigid. It seems that this transition also marks the beginning of a period of black pride in Germany. Artists are leading the way. The three hip-hop/rap songs released in 2016 played a vital part in putting out language (*schwarz*) for the larger community to grab onto and continue the identity negotiation already well-underway.

Schwarz has proven to be a unifying descriptor, largely catapulted forward by the global nature of the Black Lives Matter (BLM) movement. Berlin is the epicenter of Black Lives Matter and all other anti-racism organizations. The growing sense of self-definition served as the foundation upon which BLM built a center stage in 2020 (Milman et al., 2021). The protests surrounding the death of George Floyd provided a transnational context for “blackness” to become a more defined, solidified and unifying identity not only for black Germans, but for many minorities on German soil. Partridge (2022) examines how minorities “become [...] Black” through what he identifies as “woundedness” (pg. x-xi). Blackness acts for the disenfranchised as a source of social and political empowerment in a political context in which identity politics do not exist. Identity and solidarity coalitions are quickly proliferating across Europe surrounding anti-blackness, anti-racism, and, increasingly represented, immigration. Partridge (2022) predicts a future in which refugees play a crucial role in propelling change forward.

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