EFFECTIVE PRACTICES
FOR ACADEMIC LEADERS   A Stylus Briefing®

Strategic Planning for Diversity and Organizational Change
A PRIMER FOR HIGHER-EDUCATION LEADERSHIP
by *Damon A. Williams* and *Charmaine Clowney*

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Executive Summary

This briefing is designed for senior academic leaders and others engaged in the work of campus diversity and organizational change, whether at the president, provost, dean, or department head level, or participating in campuswide diversity planning committees and commissions as students, faculty, and staff. Although the briefing focuses on the key role of academic leadership, developed it so that it would be helpful for the full spectrum of individuals often charged with intersecting with the diversity planning and leadership process. It is based on several concepts that emerged as part of a project by the Association of American Colleges and Universities (AACU) on the future of diversity work in higher education, Inclusive Excellence (Williams, Berger, & McClenden, 2005); a project examining dedicated executive-level diversity leadership, The Chief Diversity Officer Project (Williams & Wade-Golden, 2006; in press); the scholarly literature on diversity and organizational change; and our individual experiences building sustainable capacity to support and nurture diversity as administrators, researchers, consultants, and thought leaders nationally and at our respective institutions.

We describe the context for understanding the environmental dynamics of diversity in the 21st century and the challenge of the diversity planning process. Next, we identify three key existing diversity models and a new multidimensional model that offers promise for enhancing diversity efforts on college and university campuses. We conclude with multiple principles—which we call *change levers*—important for academic leaders interested in applying this model to leading and managing diversity in a way that is systematic, focused on diversity's implications for all students, driven by accountability techniques, and intended to create real and meaningful change at all levels of institutional culture: the Inclusive Excellence Model of organizational change and diversity (Williams et al., 2005).

INTRODUCTION

During the last several decades, the diversity idea has evolved into a sometimes confusing discussion of overlapping concepts such as multiculturalism, access, equity, inclusion, and affirmative action (Cox, 2001; Norton & Fox, 1997; Smith & Wolf-Wendel, 2005; Thomas, R., 2001). Even though diversity is often associated with equal opportunity and affirmative action employment and admissions policies, it is almost limitless in its definition and includes any number of identities. If we were to ask 10 people to define

diversity, 10 definitions would emerge. They would range from a narrow focus on the representation of ethnic and racial minorities, to the fostering of a supportive campus climate for members of the gay, lesbian, bisexual, transgender, and queer communities, to the infusion of diverse content into the academic curricula and better preparation of all students for the realities of a diverse democracy. This complexity often paralyzes well-meaning academic leaders, diversity planning committees, student affairs professionals, and others who are unable to reconcile the numerous definitions of diversity on college and university campuses.

Whereas the initial focus of diversity policies and programs was reactive and limited, changing demographics, the emerging knowledge economy, shifts in the Supreme Court's view of diversity, and other pressures have enhanced the strategic importance of diversity efforts in the new millennium (Williams et al., 2005). Peterson and Dill (1997) foreshadowed this point in "Understanding the Competitive Environment of the Postsecondary Knowledge Industry," noting that diversity is one of six major forces reshaping higher education as we know it.

For nearly 50 years, higher education has actively addressed campus diversity issues (Smith & Wolf-Wendel, 2005). In the 21st century, it is rare to find a postsecondary institution without defined diversity capabilities. At many institutions, affirmative action offices and policy statements, diversity task forces and commissions, multicultural affairs units and centers, women's studies programs, and even general education diversity distribution requirements are common (Humphreys, 1997; Smith & Wolf-Wendel, 2005; Williams et al., 2005). The problem with most of these efforts is that they exist at the margins of higher-education missions and campus priorities, separate from conversations of institutional excellence and meeting the strategic mandates of a changing environment. Academic leaders at all levels need to understand these priorities and the models available for achieving current and emerging diversity goals and priorities of higher education.

STRATEGIC PRESSURES FOR CHANGE

Colleges and universities continually interact with their environments and must respond to these dynamics if they are to remain viable when circumstances and trends change (Alfred, 2005). In higher education, the reasons for addressing diversity continue to evolve. Our review suggests four strategic pressures driving institutions to consider the challenge and opportunities of diversity:

1. *Legal and political dynamics.* Federal, state, and local laws and regulations have promoted diversity policies and practices in higher-education institutions, especially in the areas of employment and admissions. The use of race and ethnicity as a factor in institutional decisions, although in compliance with selected laws, has also generated significant legal and political challenges, chiefly through state ballot initiatives and executive orders (Cokorinos, 2003; Gurin, Lehman, & Lewis, 2004; Orfield & Kurlaender, 2001).
2. *Changing demographics.* The American population is becoming more ethnic, racially diverse, and older, creating a need to examine these

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emerging markets for economic, social, and competitive reasons. Within a decade, it is likely that ethnic and racial minorities will form the core of traditional college age students, and their educational needs must be met to maintain overall enrollment levels and funding stability (Harvey & Anderson, 2005; Hodgkinson, 2000).

3. *Emergence of a postindustrial knowledge economy.* The new economy is driven by the reality that educated people and their ideas are the key to economic prosperity. Higher-education institutions must prepare citizens for knowledge-driven, demanding positions in what are often the fastest growing sectors of the economy. Businesses and other organizations continue to recruit and value a culturally competent, diverse workforce, which helps them respond to the increasingly competitive demands of the global economy (Duderstadt, 2000).

4. *Persistent societal inequities.* Disparities in race and ethnicity, where the haves and have-nots are more distinct and sharply structured along racial and ethnic lines than ever before, make it challenging for institutions of higher education to capitalize on increasing demographic diversity. Economic inequities especially impede access to and graduation from higher-education institutions for many students of color (Massey & Denton, 1993).

DIVERSITY PLANNING IN HIGHER EDUCATION

The problem with meeting the challenges of the strategic pressure points is that our institutions often resist change (Peterson & Dill, 1997; Rowley & Sherman, 2001; Williams, 2006). In the past, our response to legitimate demands for effective diversity changes
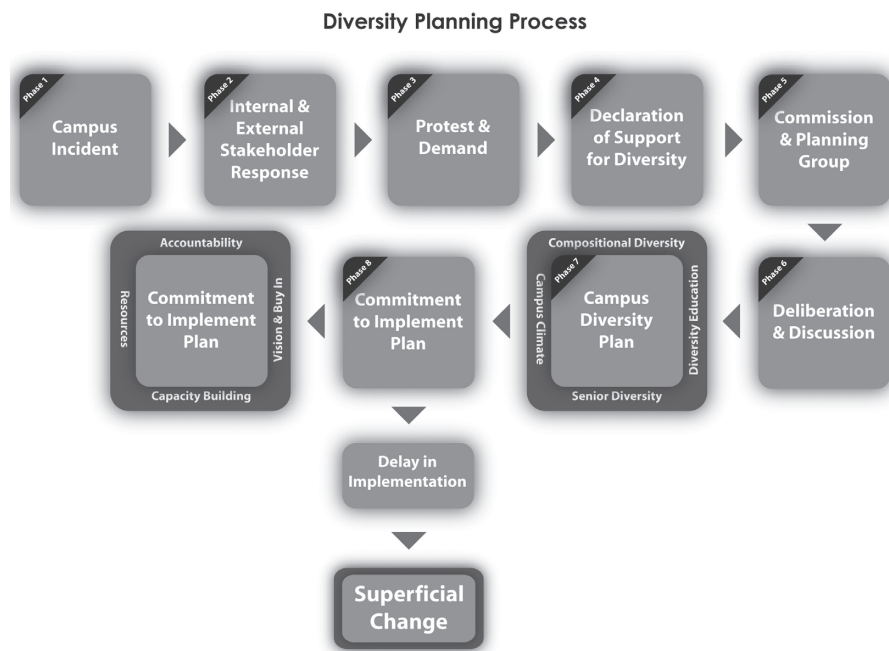
has been to ignore them; respond only in the face of exigent legal forces; create change efforts that are symbolic and lacking in human, financial, and technical resources; or leverage new initiatives only when academic leaders are faced with powerful incidents of campus unrest and social upheaval (figure 1).

Most diversity planning efforts follow a similar reactive pattern that often launches from some type of disruption in the culture of the institution and, in many instances, ends in less-than-meaningful change (Williams, 2006; Williams et al., 2005). Our review of several campus diversity planning cycles, interviews with many of the nation's leading diversity officers, and review of the literature in this area suggest the following phases in the diversity planning process:

• *Phase 1.* A campus incident or, in some cases, the hiring of new senior leadership interrupts the normal process of diversity activity

on campus. Some typical actions might be a racial or sexual assault on campus, a hate crime, activity of insensitivity, or an embarrassing statement made by senior leadership regarding some issue of diversity.

• *Phase 2.* As a result of the event in Phase 1, an internal and external stakeholder response is galvanized from some combination of students, faculty, staff, parents, government officials, alumni, governing boards, and others.

• *Phase 3.* Often, the response in Phase 2 leads to a series of campus protests and demands made to senior leadership for diversity changes. This phase may feature high-level local, regional, and national media involvement, escalating the pace of change.

• *Phase 4.* In response to the demands made in Phase 3, the president, provost, or some other senior academic leader makes a

Diversity Planning Process

Figure 1.   Phases of Diversity Planning and Implementation in Higher Education

symbolic statement regarding the institution's support of diversity. This may take the form of a letter to the community, a press release, or a lecture presented to the entire campus community.

- *Phase 5.* Senior leadership commissions a planning group or task force to examine issues of diversity, inclusion, and climate on campus.
- *Phase 6.* Deliberation and discussion regarding campus diversity issues takes place. Data are analyzed, forums are conducted, and peer institutions are benchmarked to develop a set of institutional diversity recommendations.
- *Phase 7.* The campus diversity plan often includes recommendations to (1) increase the diversity of the student, faculty, staff, and administrative bodies; (2) improve the campus climate for all members of the community; (3) establish a senior or chief diversity officer (CDO) role to guide the institutional change effort and "hold people accountable"; and (4) implement diversity training and education programs for students, faculty, and staff.
- *Phase 8.* After the plan is written, the process follows a similar pattern for many institutions: The diversity committee makes a presentation to the president, board, faculty senate, or some other governing body. The president or, in some instances, the provost then makes a broad public statement about the importance of diversity that appears as splashy columns in the university, student, local, and perhaps national newspapers announcing the new plan.

After Phase 8, the diversity process is much more difficult to map and de-

pends heavily on institutional leadership's understanding and desire to lead deep and meaningful change across campus. Although the majority of diversity reports do a good job of documenting the problem and presenting solid if not transformative recommendations for change, they rarely mention current diversity capabilities and resources, implementation processes, authority for overseeing day-to-day implementation activities, and budget allocations to finance the many aspects of the plan. Consequently, many diversity plans are quickly shelved, because institutions fail to adequately explicate how change will happen over time (Williams, 2006). The process of implementing change rests at the center of the Inclusive Excellence Model of organizational diversity, and its propositions are outlined later in this briefing.

MODELS OF DIVERSITY IN HIGHER EDUCATION

Thomas Kuhn (1962) popularized the idea of paradigms as an underlying system of beliefs, patterns, and assumptions that shape our thinking and determine, in large part, our perceptions and experiences. Several scholars discuss the various models of the diversity paradigm in organizational life, particularly in a corporate context (Cox, 2001; Loden, 1996; Norton & Fox, 1997; Thomas, R., 2001). Table 1 extends the work of these authors to present three primary diversity models currently operating in the higher-education paradigm of diversity work: the Affirmative Action and Equity Model, the Multicultural Model, and the Academic Diversity Model.

Each model defines diversity differently and has evolved into a unique set of policies, programs, initiatives, and structures—organizational technologies designed to achieve its specific goals and objectives. All three models

may occur simultaneously, although it is rare for them to be tightly coupled and exist in the same organizational division or structure (Williams & Wade-Golden, in press).

The Affirmative Action and Equity Model

The Affirmative Action and Equity Model was developed to eliminate overt barriers of exclusion to higher education and increase the numbers of minorities, women, and other protected groups enrolled in and working on college and university campuses (Washington & Harvey, 1989). Equal employment opportunity and affirmative action court rulings, policies, executive orders, laws, and regulations in the 1950s through the 1970s led to the development of the Affirmative Action and Equity Model (Loden, 1996; Norton & Fox, 1997; Thomas, R., 2001; Thomas, D., 2004). Although it continued to evolve after it was first launched, the model generally holds that colleges and universities have a moral obligation to affirmatively redistribute opportunity to protected groups and ameliorate the current effects of past discrimination.

The model was intended as a temporary tool to fulfill a legal, moral, and social responsibility by initiating targeted efforts to ensure the creation of a diverse environment (Thomas, R., 2001). It was meant to spur change in demographic representation and eliminate overt discrimination. Although African Americans, Hispanics, Native Americans, and Asian and Pacific Islanders were the initial targets of the model, policy changes and legal rulings have benefited individuals with disabilities, women, and Vietnam veterans (Loden, 1996; Norton & Fox, 1997; Thomas, R., 2001; Tierney, 1997; Washington & Harvey, 1989). Affirmative action officers, policy statements of nondiscrimi-

Table 1. Three Models of Organizational Diversity Capabilities in Higher Education

Dimension	Affirmative Action and Equity	Multicultural	Academic Diversity
Launching point	1950s and 1960s	1960s and 1970s	Late 1990s–2000s
Locus	Civil rights movement	Black Power movement	Diversity movement
Drivers of change	Shifting laws, policy, social movements	Campus social protests, shifting legal policy	Changing demographics, workforce needs, persistent inequalities, legal and political dynamics
Definition	Focused institutional effort designed to enhance the compositional diversity of the university's faculty, staff, and students and to eliminate discriminatory practices	Institutional diversity efforts designed to provide services for ethnic and racially diverse students, women, and other bounded social identity groups and secondarily to research these groups and constituencies	Focused agenda centered on infusing diversity into the curriculum of the institution and conducting research around issues of diversity
Diversity rationale	Social justice	Social justice	Educational value
Focus	Profile change	Supporting diverse constituents	Psychosocial and cognitive development
Strategy	Remediating and eliminating discrimination	Providing diversity services, fostering community and tolerance on campus, and conducting research and teaching courses in the areas of diversity	Providing diversity as an important resource for student learning
Target of efforts	Underrepresented groups of students, faculty, and staff	Underrepresented groups, social identity groups, women, primarily students	All students
Organizational capability	Affirmative action programs, plans, and policy statements; Race-sensitive admissions programs and processes; equal opportunity programs	Multicultural affairs units, cultural centers, and ethnic and gender studies institutes and programs	Centralized diversity requirements and diversity programs such as intergroup relations offices.
Dynamic of change	Incremental—first order	Incremental—first order	Incremental—first order

nation, targeted recruitment initiatives and hiring programs, outreach initiatives such as federally funded TRIO[1] programs, and race-attentive admissions and financial aid programs are the primary organizational tools through which the diversity capabilities of the Affirmative Action and Equity Model are realized.

As noted, the most prominent and challenged form of affirmative action centers on access to education, particularly admission to colleges and universities, using race, ethnicity, and gender as part of the competitive selection processes (Orfield & Kurlaender, 2001). Whereas the quota system existed in the early 1970s (Washington & Harvey, 1989), the model has evolved over the last 20 years as the courts revise their thinking regarding the execution of affirmative action programs and policies in college and university admissions (Gurin, et al., 2004; Tierney, 1997).

This model is laudable in terms of increasing the numbers of ethnic and racially diverse students and women enrolled in higher education (Tierney, 1997). It also has been instrumental in increasing the number of women working in the professoriate (Tierney, 1997). Where the model has been less than successful is in increasing the numbers of historically underrepresented African Americans, Native Americans, and Latinos in the faculty and minorities and women at the executive ranks of institutional leadership (Harvey & Anderson, 2005).

The Affirmative Action and Equity Model also focuses on the reduction of overt forms of discrimination and sexual harassment in the workplace through targeted interventions, trainings, and investigations. Diversity training pro-

grams usually emerge in reaction to a claim of discrimination or harassment, or in accordance with a state law requiring a certain number of diversity programs. Although important corrective mechanisms, these efforts often fail to connect diversity with the functional roles that faculty, staff, and administrators play on campus and the relationship between diversity and issues of teaching, learning, research, and leadership. They do nothing to address deep-rooted assumptions that diversity is antithetical to quality, that diversity research expands and advances the knowledge base of academic disciplines in new and innovative ways, or that the culture of the institution may passively reject the presence of certain groups by refusing to evolve and accommodate their presence.

The problem with the model is that it does little to change the norms of a traditional culture not originally intended for minorities, women, and other federally protected groups. The Affirmative Action and Equity Model was intended to accomplish only a piece of the process of deep organizational change (Thomas, R., 2001). It is the responsibility of academic leaders to transform the environment in such a way that it would enable these groups to thrive on campus.

The Multicultural Model

The integrationist ideology of the Affirmative Action and Equity Model flowed from legal and political rulings and focused on breaking down barriers to full participation in U.S. society. By comparison, the Multicultural Model flowed from the cultural politics of the 1960s and 1970s and is anchored in the ideology of Black Power and similar nationalist cultural movements such as the Chicano, Native American, and women's movements (Hale, 2004; Ogbar, 2005; Peterson, Blackburn, & Gamson, 1978; Smith & Wolf-Wendel, 2005; Wilson, 2005). These movements focused on the expression of political ideas and, for many, embracing ethnic or identity-specific values, politics, traditions, cultures, and behavior (Ogbar, 2005).

First, the Multicultural Model is motivated by a commitment to capitalize on the richness of different cultures and to help the members of those cultures thrive within the context of a broad institutional environment that may in an active or passive way resist their presence on campus (Peterson et al., 1978). This means culturally aligned services, programs, initiatives, and offices designed to nurture student success on campus (Peterson et al., 1978). Second, the model focuses on understanding cultural similarities and differences and exposing persons to diversity in a way that establishes mutual understanding, respect, and greater openness to difference (Loden, 1996). Third, the model aims to advance scholarship and research into previously ignored communities of women, minorities, and others.

The Multicultural Model is an incremental organizational change approach that creates unique offices, programs, and structures that focus on issues of race, ethnicity, and gender as matters of first priority. Although national data are limited, anecdotally we know that many institutions have at least one office or individual specifically charged with diversity-related matters on campus. Some common capabilities of this model are ethnic and women's cultural centers; gay, lesbian, bisexual, transgender, and queer (GLBTQ) program offices; multicultural affairs offices; ethnic-specific student organizations; senior diversity officer roles; and diversity theme month events (Peterson et al., 1978).

The model makes an important distinction between "diverse groups" and "federally protected groups." Federally protected groups are defined by the federal affirmative action programs mentioned in our discussion of the Affirmative Action and Equity Model. By comparison, institutional leadership defines diversity groups. Over time this definition has expanded to include GLBTQ communities; international students; commuter students; religious groups; and others with a bounded social identity group (Smith & Wolf-Wendel, 2005). Nevertheless, it is important to note that the recognition of certain social identity groups may be contested, particularly at institutions that follow a faith-based, values-driven mission or at institutions located in more conservative regions of the country. At these institutions, the model may be more constrained; however, many institutions have invested in "Rainbow Centers," "Asian Cultural Centers," and "International Affairs" offices focused on previously ignored or undefined "diverse" populations.

As with any schema, some programs and initiatives are difficult to categorize in one model. An example of this dilemma is units such as African American Studies and Gender Studies. These units not only conduct research into experiences, challenges, and identities of various minority, gender, and other social identity groups, but they also play an important role in offering academic, cultural, and social programs for members of their constituencies (Asante, 1991; *The Journal of Blacks in Higher Education*, 2001; Peterson et al., 1978; Wilson, 2005). Although this hybrid functional role opens these units up to numerous criticisms that their work is not scholarly, they should be understood as emerging from a context that was highly political and remains so, even to this day, as they attempt to deconstruct, evolve, and challenge the

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traditional Eurocentric and male-centered assumptions of reality in new and important ways. Because of the hybrid nature of their mission, these units exist in the synergies between both the Multicultural Model and the Academic Diversity Model, as do other initiatives such as diversity faculty retention programs and initiatives.

The Academic Diversity Model

Discussions of the educational benefits of diversity first appeared in the higher-education landscape during the Bakke decision of 1978 (Chang, Chang, & Ledesma, 2005; Orfield & Kurlaender, 2001; Tierney, 1997). In the Bakke decision, Justice Powell cast the deciding vote in a split court. His ruling in support of affirmative action is widely known as the "diversity rationale," and he argued that a narrowly tailored policy could constitutionally consider race as one of many factors in the decisions of college and university admissions. Under this rationale, Powell affirmed the right of postsecondary institutions to make their own determination regarding the characteristics of their educational environment and the selection of their student body. Powell argued that a diverse student body broadens the range of viewpoints collectively held by those students and subsequently allows a university to provide an atmosphere that is conducive to speculation, experiment, and creation (Chang et al., 2005). Under this rationale, Powell found that race-conscious admissions served a compelling educational interest and were lawful under the First Amendment.

Grounded in theories of cognitive and social psychology, the Academic Diversity Model argues that the discontinuities associated with diverse educational environments are essential to enhancing the relational and cognitive abilities of all students (Gurin, Dey,

Hurtado, & Gurin, 2002). The model is distinctive from previous models because of the intentional way that diversity is framed as important for whites and students of color, not because of the need to fulfill a moral or social obligation, but for educational purposes (Chang et al., 2005; Gurin et al., 2002; Milem, Chang, & Lisling, 2005).

At the heart of the Academic Diversity Model is an intentional linkage of diversity with the academic activities of the institution. Whereas the Affirmative Action and Equity Model defines diversity in terms of social justice and redistributive equity, and the Multicultural Model defines diversity in terms of supporting bounded social identity groups and advancing knowledge about these groups, the Academic Diversity Model argues that the presence of diversity, particularly racial and ethnic diversity, is an essential environmental condition for providing a high-quality learning experience in the 21st century (Gurin et al., 2002; Gurin et al., 2004; Milem et al., 2005; Orfield & Kurlaender (2001). The presence of diversity establishes a context that allows students to question their identities and develop new ones, resulting in an ability to take the position of the other, view the world from multiple perspectives, and engage with the challenges of difference (Gurin et al., 2002; Milem et al., 2005).

The presence of unprecedented levels of diversity is driving colleges and universities to broaden how they define and operationalize the concept. Thus the Academic Diversity Model includes primary dimensions of diversity—such as race, age, ethnicity, or gender—and secondary characteristics—such as learning styles, religion, socioeconomic status, and geography (Loden, 1996). In this new tradition, diversity encompasses everyone irrespective of race, ethnicity, or disparaged status as

a minority group (Williams et al., 2005). This point is a key distinction of this model versus other models and begins to move the discussion of diversity from the margins toward the center of the mission of colleges and universities to develop an educated and informed citizenry (Gurin et al., 2004).

The Academic Diversity Model assumes diversity education requirements and programs focused on intergroup relations and difficult dialogues across difference. In a national study, Humphreys (1997) found that numerous institutions have diversity requirements, but that many of these requirements were ill defined and lacked superordinate learning goals. Simply putting diverse students in a classroom studying a "diverse" subject such as German literature is not enough. Although a step in the right direction, these requirements may not help students better understand difficult and challenging issues, such as the existence of power and privilege or the differential impact of racism and discrimination among societal groups.

In related fashion, higher-education students benefit from more intergroup dialogue programs such as those at the University of Denver, Arizona State University, the University of Massachusetts, and the University of Michigan. These programs focus on difficult conversations across difference, are for academic credit, and engage students in a sustained semester-long project. Although taking different forms, these types of programs offer a powerful opportunity for students to understand their own identities as well as the identities of others, and to develop new ones as they engage in the dialogue process.

THE INCLUSIVE EXCELLENCE MODEL

Nationally, a conversation is building regarding the development of a power-

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ful diversity change process that the Association of American Colleges and Universities refers to as the Inclusive Excellence Model. The language and tenets of the Inclusive Excellence Model are under consideration and at some level of implementation at San Jose State University, the University of Akron, Wesleyan University, Winona State University, the University of Connecticut, the Pennsylvania State System of Higher Education (PASSHE), St. John's Fisher College, and others. Although implemented differently across each of these institutions, the Inclusive Excellence Model is grounded in the following six core assumptions:

1. Political and legal dynamics, changing demographics, the emergence of the knowledge economy, and persistent inequalities create the strategic context for a diversity rationale.
2. Diversity is an important institutional resource that should be enhanced, institutionalized, and leveraged toward the goal of institutional excellence.
3. Focus needs to be on ensuring student intellectual and social development and offering the best possible educational environment for all students, irrespective of identity and background.
4. Organizational resources need to be used strategically to ensure that a diverse student body achieves academically at high levels and that those on campus who contribute to that goal are acknowledged and rewarded.
5. Attention needs to be paid to the cultural differences that learners bring to the educational experience, and it must be recognized that these differences are to be used in the service of learning for all students.
6. The intentional study of topics such as race, ethnicity, gender, sexual orientation, power, privilege, and the

interdisciplinary nature of these topics and others advances the strength of the academy and better situates postsecondary institutions to address emerging challenges and dynamics presented by our evolving environmental context.

Managing Diversity in Higher Education

Part of a larger movement toward "managing diversity" in all areas of organizational life (Loden, 1996; Thomas, R., 2001; Thomas, D., 2004), the Inclusive Excellence Model argues that diversity efforts be grounded in a powerful Strategic Diversity Platform (SDP) that is integrated, systematic, focused on diversity implications for all students, and intended to create real and meaningful change at all levels of in-

stitutional culture. The platform is powered by the educational, social, and business rationales for diversity and stresses the historic and current relevance of affirmative action but also acknowledges the importance of the emerging issue of diversity (figure 2). In an interview conducted specifically for this project, Judy G. Hample, chancellor of the PASSHE, summarized this point well:

Recruiting and retaining ethnically and racially diverse students, faculty, administrators, and executives strengthens our economy. Diversity means more than morally doing the right thing. Depending on the geographic region of the state, native Pennsylvania students have limited exposure to ethnic and racial diversity. Diversity is the right thing to do. Our system has to provide students with
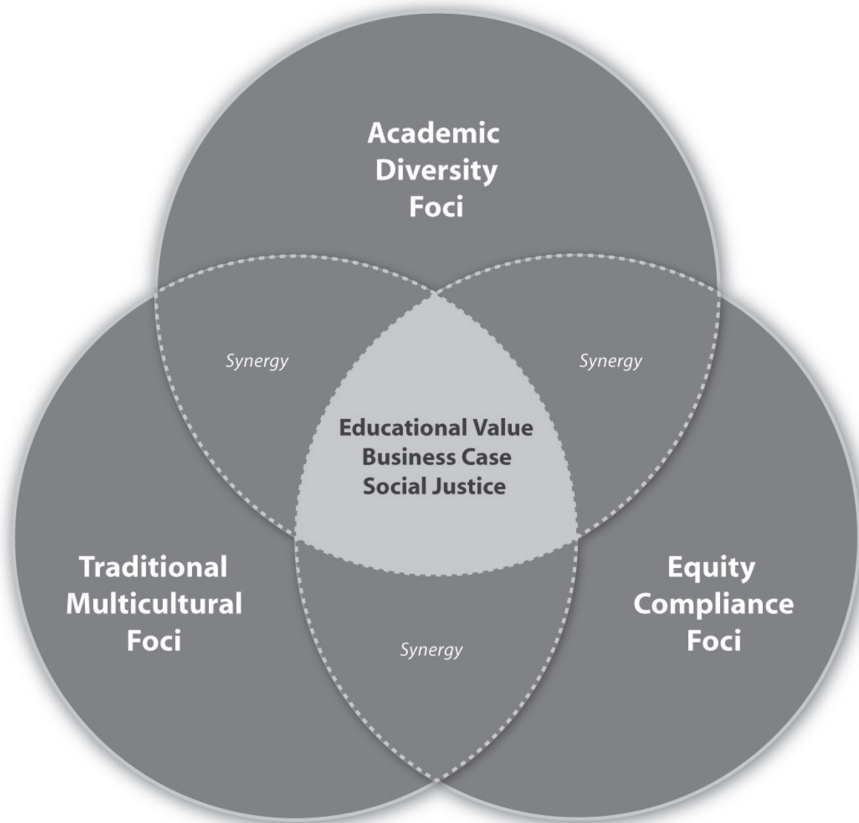

Figure 2.   The Strategic Diversity Platform

                   Effective Practices for Academic Leaders

this exposure to ensure that they are prepared for the demands of a pluralistic and complex society and workforce. Having well-educated citizens who appreciate and understand the different perspectives of persons from other cultures is a central goal of higher education, and one that we take very seriously within the PASSHE. (J. G. Hample, personal communication, September 19, 2006)

This point is important for academic leaders interested in moving forward with academic diversity initiatives but wondering about the continuing relevance of traditional diversity efforts such as affirmative action and cultural centers and programs. As this model indicates, the question is not one of choosing among the Affirmative Action and Equity, Multicultural, and Academic Diversity models. The question for academic leaders is: How do we integrate these models into a powerful framework that will capitalize on the strengths of each? To accomplish this goal requires a diversity approach that will evolve, extend, and optimize current models while creating a context for new capabilities.

Strategic Change Levers

The Inclusive Excellence Model combines aspects of previous models and frames the diversity and inclusion journey as an intentional effort to change institutional culture. It is a philosophy designed to activate a combination of strategic levers for changing strategy, organizational structure, human performance enhancement programs, reward systems, and processes of the institution (Galbraith, 2002). The most important levers are the following:

1. Have senior leadership guide the change journey.
2. Engage the campus community.

3. Focus on transforming institutional culture.
4. Develop a strategic plan for diversity.
5. Develop diversity leaders among faculty, staff, and administrators.
6. Build an integrated SDP.
7. Establish accountability strategies to drive change.
8. Create motivational and entrepreneurial strategies to encourage change.
9. Use scorecards to track change and enhance organizational learning.
10. Communicate campus diversity efforts relentlessly.

Lever 1: Have Senior Leadership Guide the Change Journey

Top-level support and long-term commitment are the foundations of the Inclusive Excellence Model of change. The potential of organizational change is unleashed when individuals have a common vision of the future (Rowley & Sherman, 2001). Senior leadership helps to launch this process by creating a broad institutional vision, redirecting resources necessary to implement that vision, and requiring plan development and accountability from individuals at multiple levels of the institution. Only the president, provost, and other senior leaders can focus attention and prioritize diversity in a manner sufficient for institutional changes to be deep and transformative (Cox, 2001; Loden, 1996; Thomas, D., 2004; Williams, 2006).

Although some may think that campus diversity efforts are the responsibility of senior diversity officials and committees (Williams & Wade-Golden, in press), only the will of the campus executive team and involvement of key leaders at all levels of the institution will activate the Inclusive Excellence Model. As James Duderstadt (personal communication, February 27, 2004), president emeritus of the

University of Michigan, observed in an interview, "The president has to carry the flag on these issues and get out in front of the institution. You cannot lead these efforts from the rear, and you cannot assign them over to anyone else."

Diversity officers and committees can provide point leadership and strategic thinking, but the final responsibility for guiding the change rests squarely with senior institutional leadership. If the president, provost, deans, vice presidents, and other key leaders are not guiding the journey, the implementation is destined to achieve less-than-optimal results. The active involvement of senior leadership is one of the key tenets that distinguishes the Inclusive Excellence Model from other higher-diversity models that are often limited to activation at the level of multicultural affairs and affirmative action offices.

Lever 2: Engage the Campus Community

Although they use multiple business processes, colleges and universities behave differently from their corporate counterparts (Alfred, 2005; Birnbaum, 1988; Rowley & Sherman, 2001). To implement broad-based diversity changes effectively, institutional leadership needs to recognize these differences. One important difference is the need to engage the campus community broadly when major change initiatives are going to occur—particularly when they affect the academic domain of the institution (Rowley & Sherman, 2001).

Because of the academic nature of the Inclusive Excellence Model, senior leadership must help the campus community understand the rationale for change and shape the goals and implementation strategies of the diversity change journey. This demands honest and open communication with campus constituencies. Faculty, staff, and stu-

dents care about their institutions and are more favorable to change projects if they are invited to provide input at the beginning and during the process (Birnbaum, 1988; Rowley & Sherman, 2001). Many leaders fear such a transparent strategy, but given the magnitude of change proposed under the Inclusive Excellence Model, engagement with the community is essential if the change is to become a permanent part of the institution's culture.

Diversity Web sites, e-mail suggestion boxes, annual diversity reports, and presidential remarks are important. However, more powerful strategies create the opportunity for dialogue between the campus community and institutional decision makers. Successful efforts at implementing the Inclusive Excellence Model might include accessing faculty expertise for consulting; hosting conversations with key institutional stakeholders; or holding "town hall" meetings with faculty, students, and staff.

These strategies, in addition to campuswide diversity planning committees and task forces, allow institutional leaders to engage the campus community in a conversation about the change. Although the process is not intended to be democratic, even if individuals disagree with the changes, they will respect senior leadership for taking the time-honored campus traditions of collegial engagement and providing an opportunity to give guidance to the change journey (Birnbaum, 1988).

Lever 3: Focus on Transforming Institutional Culture

The Inclusive Excellence Model is predicated on the assumption that campus diversity efforts must focus on systematically interrupting the usual processes of institutional culture (Smith, Turner, Osei-Kofi, & Richards, 2004).
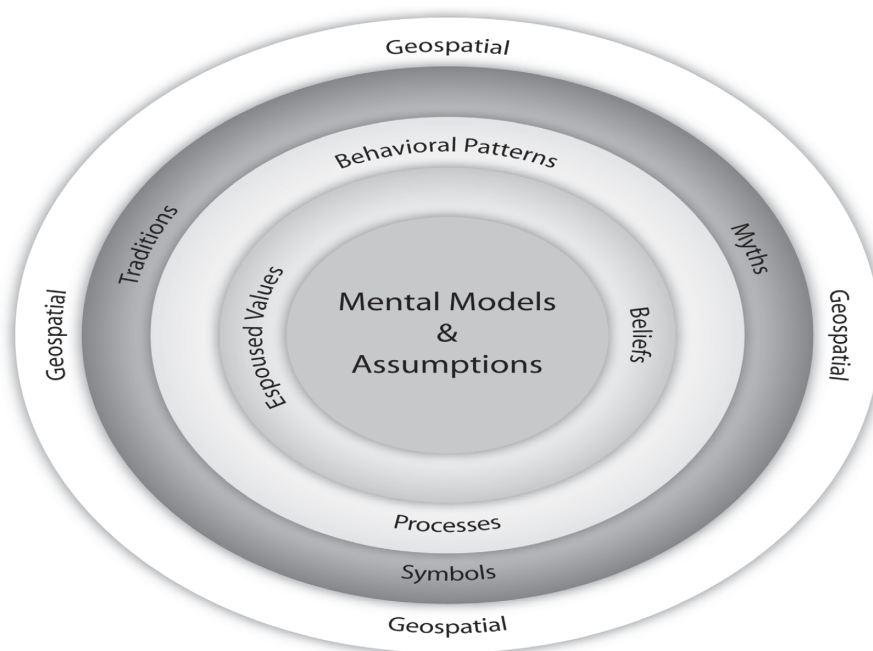

Figure 3.   Adaptation of Schein's Model of Organizational Culture

Source: From *Organizational Culture and Leadership: A Dynamic View*, by E. H. Schein, 1985, San Francisco: Jossey-Bass.

Noted organizational theorist Edgar Schein (1985) observes that institutional cultures have multiple layers (figure 3). The surface, or geospatial, layer in establishing a culture that values diversity is the easiest one to manipulate; institutions commonly add diverse images to their on-line brochures and magazines or may move a cultural center to a new and more centralized campus location. The more challenging cultural changes take place at the core of institutional culture and involve the embedded values, beliefs, and assumptions guiding the behavior of students, faculty, staff, and administrative leadership regarding diversity (Schein, 1985). It is at this level that diversity efforts are most commonly resisted, because many institutional citizens stubbornly view themselves as part of a sacred academic "brotherhood" that must be protected at all costs (Rowley & Sherman, 2001). Some com-

mon forms of resistance include believing that high standardized test scores are the only way to measure student quality, or that tenure and promotion can be determined only by publishing in the same journals and using the same research methodologies as senior faculty members, or that faculty development activities are distractions that should be avoided.

Whether the cultural change involves developing new diversity recruitment and retention processes, supporting ethnic-specific faculty affinity organizations, or hosting an annual diverse faculty development institute, the superordinate goal of these efforts is the cultural transformation of institutions that were, in many ways, built to serve the nearly all-white male student populations for whom they were founded. Leaders invested in the Inclusive Excellence Model must think about each diversity effort as part of an

integrated whole and activate change efforts at multiple levels of the institution's culture.

Lever 4: Develop a Strategic Plan for Diversity

Another important lever of the Inclusive Excellence Model is strategic planning for diversity. This begins by writing diversity into the formal mission statement of the institution, as well as locally at the school, college, or divisional levels. Given the permanence of the institutional mission statement, referencing diversity constitutes a deep and broad commitment and is an important building block for other campus diversity efforts. These statements should provide a clear definition of diversity and its implications for student learning and fulfilling the educational purposes of the institution. By making the mission prioritize diversity, institutional leaders create a more permanent, symbolic, and visible context for investing energy, resources, and time in other strategic diversity planning efforts.

One of the primary techniques for activating this prioritization is through campuswide diversity plans authorized at the highest levels of the institution. Although no panacea, campuswide diversity plans form both the "adobe" of an institution's strategic diversity framework and a beacon for the institution to follow. To achieve maximum effectiveness, these plans must be accompanied by decentralized diversity planning efforts that define and operationalize diversity at the local level of schools, colleges, units, and departments. For example, it is not enough for a campuswide diversity planning committee to recommend that the institution increase the representation of historically underrepresented graduate students even when the plan is called for by the president or provost. The graduate school and other units

that play a key role in achieving this goal must actively define what this means for them and then develop realistic strategies to guide their efforts.

By requiring diversity plans throughout the academic environment, academic deans, vice presidents, department chairs, and others must "own" the definition and implementation process locally. This allows campus stakeholders to define the diversity challenge from their unique perspective. For example, what does "diversity" mean from the perspective of the school of nursing? The school of business? Or the college of liberal arts? Although undoubtedly related, this exercise will help these entities to move the idea of diversity from a place of abstraction to a place of operational definition and action, for example, in terms of cultural competency in the health services, understanding the business case for diversity, and Afrocentric paradigms in the social sciences.

Finally, diversity must be an integral part of academic and strategic planning efforts, discussed at trustee and faculty senate meetings and among senior leadership in both general academic plans and broad strategic efforts of the institution. Diversity cannot be discussed singularly within the campus diversity plan and/or affirmative action plan. These more-specific plans should complement the broader planning documents of the institution.

Lever 5: Develop Diversity Leaders among Faculty, Staff, and Administrators

One of the most powerful levers for changing institutional culture is through the human resources of the institution—its faculty, staff, and administrative leaders. From this vantage, institutional leaders have three options for developing a team of diversity leaders:

1. Remove people from office who don't meet the expectations of the institution's emerging diversity agenda.
2. Cultivate understanding, new knowledge, skills, and attitudes in those currently employed in administrator, faculty, and staff roles.
3. Bolster the efforts of those already involved in campus diversity efforts by enhancing their visibility and ability to do the work.

Although some individuals will need to be removed from positions of authority, more realistically, institutional leaders will focus their efforts on enhancing the efforts and abilities of those already in rank. This requires the development of human performance enhancement strategies designed to educate faculty, staff, administrators, and students regarding the definitions, framework, skills, and abilities required to help spur the diversity change process forward. The term *education*, not *training*, is used to suggest that leadership development is best accomplished through a confluence of learning pedagogies and not simply "diversity training workshops" (Cox, 2001).

Traditional diversity training programs often emerge out of the Affirmative Action and Equity Model and may not cover all of the numerous topics required within the Inclusive Excellence Model. For example, they may not focus on how a female graduate student in math/science may feel isolated in courses in which she is one of only two women in a program of 20 graduate students in a science, technology, engineering, and mathematics (STEM) discipline, or how a white male may be afraid to contribute in a pre–Civil War Black World Studies course for fear of being labeled a racist. Discussions on these topics are important because they are strategically relevant to helping all students feel included on campus,

graduating the most diverse student constituencies possible, and preparing white students and students of color to lead and follow in a diverse democracy.

The Inclusive Excellence Model requires more than basic diversity training around interpersonal dynamics, sexual harassment, and the legal context of diversity. It requires creative leadership development designed to facilitate new skills, abilities, and understanding in faculty, staff, and administrators. The University of Connecticut provides one example of such a strategy. The university has implemented a 90-minute lunch session called "Conversations on Diversity" to create a forum for the president, provost, deans, and vice presidents to engage in a working meeting around diversity topics such as the minority Ph.D. pipeline, faculty recruitment strategies, or retention in the STEM disciplines.

These meetings take place multiple times a year and feature individuals with well-regarded academic credentials and the ability to address issues of diversity from a scholarly and pragmatic perspective of higher-education leadership. To truly transform institutional culture, campus leaders must help colleagues develop new mental models (Kezar, 2001). Senge et al. (1999) argue that mental models guide an individual's view of the world and must be recast when deep institutional transformation is the focus of change. This is the goal of the "Conversations on Diversity" program at the University of Connecticut. In the absence of new mental models to interpret current diversity priorities and contexts, campus leaders will continue to rely on flawed, incomplete, or otherwise unproductive strategies built from their past experiences.

Some other educational strategies might include special conferences, training workshops, summer institutes, brown-bag luncheons, funding support to attend diversity conferences, or workshops in the new faculty orientation program. No matter how the strategy is activated, what is essential is that it is actively implemented and systematized as part of the diversity journey.

Lever 6: Build an Integrated SDP

To increase the programmatic impact and influence of an institution's diversity capabilities, they should be tightly integrated into a cohesive SDP. On many campuses, well-meaning diversity offices, commissions, plans, and initiatives are diffused, duplicative, unclear, working at cross-purposes, or in other ways not maximally benefiting the institution. In the absence of an integrated SDP, no accountability structure exists for ensuring that campus diversity resources are maximized to their greatest benefit.

One campuswide strategy for overcoming these challenges is the creation of a CDO position, especially the vertically integrated CDO model. In their upcoming book, *The Chief Diversity Officer: Strategy, Structure, and Change Management*, Williams and Wade-Golden (in press) refer to this archetype of CDO structure as the Portfolio Divisional Model (PDM). Although operationalized differently across the country, the PDM is characterized by the CDOs having a seat in the president and/or provost cabinet, direct reporting units, campuswide diversity committees chaired or staffed by the CDO, defined collaborative relationships with deans/vice presidents, and campuswide diversity planning efforts and initiatives. Having an integrated SDP allows consistent leadership, the sharing of resources, the generation of collaborative synergies, and the leveraging of disparate capabilities for maximal benefit.

Lever 7: Establish Accountability Strategies to Drive Change

Establishing accountability processes is essential to the Inclusive Excellence Model of change. The only way to ensure accountability at multiple levels of the institution is to connect campus diversity efforts to budget allocations, performance reviews, bonuses, and merit promotions—the financial systems of the organization (Rowley & Sherman, 2001). Without tapping into the financial infrastructure, true organizational accountability is impossible to achieve in terms of diversity or any other institutional goal.

For institutions serious about implementing their strategic diversity goals, tying merit to strategic objectives may be a powerful way of rewarding individuals and providing a human performance driver to get members of the campus community engaged. The problem is that this type of aggressive strategy will no doubt be met with resistance. Implementing this strategy will require a senior leadership team that is deeply resolved to achieve its institutional goals and is willing to experience the discomfort that this type of change may arouse.

One system that has made great strides toward implementing broad-based diversity accountability mechanisms is the PASSHE. More specifically, it has found a number of creative ways to link its strategic diversity plan, *Cornerstone of Excellence* PASSHE, 2004b), with its system strategic plan, *Leading the Way* (PASSHE, 2004a). Since implementing both plans, changes in the system have been dramatic, particularly at the executive level; the system now features six African American, one Latino/a, and four female presidents.

When a campus diversity plan is developed so that it directly complements the system strategic plan, both plans

leverage the same rationales, philosophy, and indicators of success or failure. The ability to fulfill institutional diversity goals is therefore viewed as fundamental to accomplishing the larger strategic goals of the system. The president and chief academic officers must be highly involved in monitoring campus implementation efforts, appoint a committee to review the institutional progress, and make recommendations on how they can improve.

Lever 8: Create Motivational and Entrepreneurial Strategies to Encourage Change

Campus leaders must have "pull" strategies alongside accountability strategies to encourage involvement in the diversity change process. In an environment characterized by shared governance and collegiality, motivational energy and entrepreneurial strategies are particularly vital. In an era of stretched resources, not all rewards can be monetary. Other incentives and rewards, including release time, program and personal recognition, and special perks, such as a privileged parking space, should be considered. The work of those individuals, schools, and departments that are making strides must not go unrecognized. The efforts of campus diversity champions must be given visibility (Cox, 2001). For example, the president could host a campuswide recognition banquet attended by the board, senior leadership, powerful alumni, and other institutional stakeholders. This type of event sends a powerful message to the campus community regarding diversity's importance and establishes new institutional traditions that help to further institutionalize changes to the campus culture.

Although central funding of diversity is critical, another strategy is to have relevant leadership structures (e.g., school, college, department) contribute a piece of their annual budget or "carry-forward" monies left over from the previous year toward a central "Inclusive Excellence" account. High-achieving diversity organizations could recoup these funds by providing innovative leadership toward campus diversity goals. By placing diversity change efforts in the competitive space that exists among deans, vice presidents, and others, we may create new motivating energy for academic leaders to own and activate the campus change process. This strategy was used with great success during the implementation of the "Michigan Mandate for Diversity" at the University of Michigan, and according to former president James Duderstadt (2000), it was essential to the university's ability to institutionalize campus diversity efforts.

A final pull strategy is to have centralized diversity challenge or matching grants accessible to students, faculty, staff, and/or departments. These competitive funds offer financial incentives to encourage entrepreneurial energy and new diversity initiatives to bubble up from the institutional community. Funded initiatives then could contribute to a special report, conference, or presentation that may be used to communicate both internally and externally the institution's efforts toward inclusive excellence.

Lever 9: Use Scorecards to Track Change and Enhance Organizational Learning

Inclusive excellence is about more than simply improving the numbers and recruiting more students of color on campus (Milem et al., 2005; Williams et al., 2005). Colleges and universities must embrace comprehensive performance measurement indicators linked to goals, objectives, strategies, and evidence. The notion of assessing organizational diversity in a manner that is balanced between outcomes and process is described in the business literature and has been adapted to the higher-education and nonprofit sectors. For example, Estella Bensimon (2004) of the University of Southern California has written extensively about equity, or diversity, scorecards.

Scorecards are powerful tools for helping institutions align their change vision with bureaucratic structures, day-to-day operations, and overarching organizational processes (Kaplan & Norton, 1992). They also can be used to communicate progress to stakeholders of the institution. When constructed as the guiding vision of a diversity plan, such a tool can enable campuses to move from simply "checking off" diversity outcomes—usually represented by the compositional diversity of the student body—to managing a comprehensive plan to reach diversity and educational quality goals and to place these goals at the core of institutional planning and action.

The Inclusive Excellence scorecard developed for the AACU is a multidimensional management and measurement tool that can simultaneously drive and assess change in four areas: (1) access and equity, (2) campus climate, (3) diversity in the formal and informal curriculum, and (4) learning and development (Williams et al., 2005). These areas, along with the quantitative and qualitative indicators of progress, should be used to guide the construction and assessment of both campuswide and unit-based diversity plans.

Lever 10: Communicate Campus Diversity Efforts Relentlessly

Some argue that strategy is a systematic way of positioning an institution within a context of community stakeholders (Alfred, 2005). In today's competitive environment, higher-education leaders should begin to think about their diversity capabilities as differentiating them

<div style="text-align:right">**13**</div>

from other institutions and giving them a competitive advantage. To accomplish this goal, institutions must communicate their diversity vision, strategy, and outcomes consistently and with conviction. Diversity and the efforts to achieve greater diversity outcomes should be a powerful piece of the institutional "brand equity" that is marketed and positioned as a positive point of difference versus peer and aspiration institutions, similar to building a new football stadium, opening a new life sciences center, or recruiting a Nobel Prize winner to the faculty.

To keep diversity on the radar of campus priorities, progress reports must be given regularly to the board of trustees, faculty senate, alumni board, parent association, and elsewhere. Furthermore, it is necessary that the president give an annual "state of diversity address," in which major milestones are presented and next steps are discussed within the context of a broad community effort to implement the plan. These strategies are necessary because they both communicate what is going on with the diversity change project and simultaneously position that project within the evolving myths, symbols, and rituals of the institution.

A More Powerful Organizational Diversity Model

What makes the Inclusive Excellence Model more powerful than previous models is its comprehensive nature. First, rather than presenting a new model of organizational diversity, the model builds on and evolves from previous models, to amplify and more fully implement them on campus. Second, the model pursues both first-order and secondary organizational change goals in an effort to create an incremental and transformative impact (Kezar, 2001). First-order changes refer to minor ad-

justments in one or more areas of the organization, such as developing a new diversity office or establishing a new diversity requirement (Kezar, 2001). By comparison, secondary changes create new patterns of behavior and assumptions governing organizational life. This takes place only if changes take place in the strategy, structure, people, processes, and reward systems of the institution (Galbraith, 2002).

No other model is as broad in its potential impact as the Inclusive Excellence Model, which promotes the embedding of diversity values into the strategic core of institutional life; prescribes key activities for top-level leaders; and encourages the involvement of students, faculty, staff, and administrators in the process of change.

Another positive aspect of the model is that it proposes a diversity infrastructure that allows tighter control and the enhanced impact of current diversity resources. In a time of pervasive financial constraints, the opportunity to more effectively leverage current resources to achieve current and emerging institutional goals is always beneficial. Whereas the diversity capabilities of other organizational models are generally unfocused, the Inclusive Excellence Model proposes vertical (e.g., CDO models) and lateral structures (e.g., campuswide diversity committees) for leading and coordinating campus diversity efforts.

CONCLUSION

Demographic shifts, legal and political contestation, economic and workforce imperatives, and increasing conversations regarding diversity as an educational imperative require institutions to transform themselves and make diversity goals central to their educational mission. However, planning and accomplishing diversity goals will con-

tinue to be a challenge into the foreseeable future.

The levers outlined here are just the beginning of the change journey and provide tools for institutional leaders to generate the creative energy necessary to achieve the goals of diversity. To meet the strategic priorities of the world in which we live, higher-education institutions must re-create the way in which we do business. Changes must occur not for their own sake but for the sake of improvement.

Transformational change is difficult to imagine and even more challenging to implement. Institutions serious about the Inclusive Excellence Model must have senior leadership that is committed to prioritizing campus diversity efforts, reallocating resources to drive change, and staying the course of implementing the proposed strategies. Although research is limited, some suggest that paradigm-rupturing change generally takes between 10 and 15 years to accomplish (Simsek & Louis, 1994). The changes proposed by the Inclusive Excellence Model will take this long or longer and require explicit actions by senior leadership and others with the courage to redefine campus systems, structures, behaviors, and priorities. In environments characterized by maintenance of the status quo, these activities will undoubtedly be unpopular and expose change agents to critique. However, only through these kinds of efforts can we hope to generate the enhanced diversity outcomes needed in the twenty-first century.

NOTE

1. The name "TRIO" is used to describe federal programs for low-income and disabled Americans funder Title IV of the Higher Education Act of 1965. They are referred to as "TRIO" programs dating back to the original

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three programs that existed when the programs was first started. TRIO is not an acronym. For more information on TRIO programs please visit http://www.trioprograms.org/abouttrio.html.

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Milem, J., Chang, M., & Lisling, A. (2005). *Making diversity work on campus: A research-based perspective.* Washington, DC: Association of American Colleges and Universities.

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Rowley, D., & Sherman, H. (2001). *From strategy to change: Implementing the plan in higher education.* San Francisco: Jossey-Bass.

This book presents a clear backdrop for understanding the dynamics of strategy, culture, and change in higher education. Principles expressed here are directly applicable to leading diversity changes in post-secondary institutions.

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