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## *Introduction to the Series*

## Mapping the Future of Inclusion and Excellence

Each of the three commissioned papers—*Making Diversity Work on Campus: A Research-Based Perspective*; *Achieving Equitable Educational Outcomes with All Students: The Institution's Roles and Responsibilities*; and *Toward a Model of Inclusive Excellence and Change in Postsecondary Institutions*—addresses one or more aspects of the work that is needed to comprehensively link diversity and quality. Collectively, they offer readers fresh perspectives on, and evidence-based approaches to, embedding this work into campus culture and sustaining this work over time.

In the first paper, *Making Diversity Work on Campus: A Research-Based Perspective*, Jeffrey Milem, Mitchell Chang, and Anthony Antonio discuss recent empirical evidence that demonstrates the educational benefits of diverse learning environments. The evidence, gathered on behalf of the University of Michigan in its defense of its affirmative action policies before the Supreme Court, indicates that diversity must be carried out in intentional ways in order to accrue educational benefits for students and for the institution. The authors argue persuasively for *a conception of diversity as a process toward better learning* rather than as an outcome—a certain percentage of students of color, a certain number of programs—to be checked off a list. They also provide numerous suggestions for how to “engage” diversity in the service of learning, ranging from recruiting a compositionally diverse student body, faculty, and staff; to developing a positive campus climate; to transforming curriculum, cocurriculum, and pedagogy to reflect and support goals for inclusion and excellence.

In the second paper, *Achieving Equitable Educational Outcomes with All Students: The Institution's Roles and Responsibilities*, Georgia Bauman, Leticia Tomas Bustillos, Estela Bensimon, Christopher Brown, and Rosusan Bartee discuss the responsibility that institutions have to examine the impact that traditional higher education practices have on those students historically underserved by higher education, including African American, Latino/a, and American Indian students. With the persistent achievement gap facing African American and Latino/a students as a starting point, the authors argue that if we do not commit to discovering what does and does not work for historically underserved students, we run the very real risk of failing a significant portion of today's college students—even as we diversify our campuses to a greater extent than ever before. To demonstrate the kind of institutional commitment that is

***Isolated Initiative: Increase racial/ethnic diversity of student body***

Responds to:

- Calls from business and community leaders to strengthen workforce diversity
- Desire to redress past societal inequities
- General feeling that diversifying student body is the “right thing to do”

But does not address:

- Compositional diversity of other parts of campus community (faculty, staff, administrators)
- Differences between predominantly white institutions and predominantly minority-serving institutions
- Campus climate once students and others arrive on campus
- Students’ multiple identities: race and ethnicity intersecting with gender, class, sexual orientation, national/regional origin, ability, and religion

## Defining “Inclusive Excellence”

At the outset of this initiative, AAC&U advanced an operational definition of Inclusive Excellence. This definition is intended to be flexible enough to be “localized” by a campus while also retaining basic principles to guide a national movement and to connect campuses in these efforts. The definition consists of four primary elements:

1. *A focus on student intellectual and social development.* Academically, it means offering the best possible course of study for the context in which the education is offered.<sup>2</sup>
2. *A purposeful development and utilization of organizational resources to enhance student learning.* Organizationally, it means establishing an environment that challenges each student to achieve academically at high levels and each member of the campus to contribute to learning and knowledge development.
3. *Attention to the cultural differences learners bring to the educational experience and that enhance the enterprise.*<sup>3</sup>
4. *A welcoming community that engages all of its diversity in the service of student and organizational learning.*

Each set of authors received this definition when they were commissioned to write the papers, and each connected it to existing and emerging research on subjects as varied as the educational benefits of diversity, the achievement gap, and organizational change. We expect this reworking to occur in the field also, as campus leaders juxtapose the definition against institutional mission, policies, and practices. At the same time, we believe the definition is incomplete without all four elements in play, and the large questions posed at the beginning of this introduction cannot be answered without having all four present.

## Why Now?

Making Excellence Inclusive builds on major AAC&U initiatives—most notably, Greater Expectations and American Commitments—and ties together the association’s long-standing interest in educational quality in the undergraduate curriculum, in diversity and civic

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<sup>2</sup> “Best” here implies the provision of qualified instructors and sufficient resources—including other learners—as well as a sequence of study that is coherent and challenging, and one that comprehensively addresses the student learning goals of the particular institution. Contexts vary from preschool to postgraduate education, by affiliation (e.g., religious or secular), and by sector (e.g., elementary, high schools, community colleges, research universities).

<sup>3</sup> Cultural differences include race/ethnicity (e.g., Latino, Caucasian, Asian/Pacific Islander, African American, American Indian), class, gender, sexual orientation, national origin, first language, physical and learning ability, and learning style.

engagement, and in preparing faculty to deepen students' learning. It is designed to address the following four dilemmas confronting higher education today.

### Islands of Innovations with Too Little Influence on Institutional Structures

Hardly any campus is without some tangible, and often impressive, number of initiatives to help create more inclusive environments, more expansive intellectual horizons, or more opportunities for outreach to the larger community. Yet how does a campus coordinate these multiple efforts so they have a greater impact on all students, and on the institution as a whole? One frequently can identify educational innovations, but rarely can one detect structures that link them. Accordingly, the impact of these innovations is isolated rather than pervasive. And with so many individual diversity initiatives springing up like daffodils in springtime, people long for coherence, cohesion, and collaboration. They also want to figure out how to “get it right” as they move through this astounding transition to an inclusive academy that strives for diversity *and* excellence.

### The Disconnect between Diversity and Educational Excellence

Although we know meaningful engagement with diversity benefits students educationally, little has been done to create a comprehensive framework for excellence that incorporates diversity at its core. Similarly, new research about how to help diverse and differentially prepared students succeed has not yet provoked widespread change across higher education. And diversity is not typically a focus at any level in “quality improvement” efforts. As a result, education leaders routinely work on diversity initiatives within one committee on campus and work on strengthening the quality of the educational experience within another. This disconnect serves students—and all of education—poorly.

### Disparities in Academic Success across Groups

There has been significant progress in expanding access to college for underrepresented students. Yet many of these students experience differential retention rates and inequities in



students affected but also for the colleges and universities they attend and for the educational system as a whole.

The ‘Post-Michigan’ En

document their challenges and successes as we work together to make excellence inclusive. In the process, we will continue to build our resource collection by featuring campus “success stories” and developing tools that reflect the latest research “what works” in fostering inclusive and educationally powerful learning environments.

### **Conclusion**

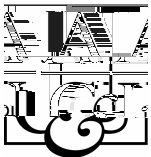
The three papers, taken together, form a rich dialogue where similarities and dissimilarities arise and information that is gleaned from one is made richer by the others. We hope they will engender this same kind of interplay between people on campuses, as well as provide them with practical evidence, support, and guidance for this ongoing work. The efforts needed to make excellence inclusive cannot be done by any person, unit, or campus alone. Nor will it look the same everywhere. What individuals and institutions *will* share are its hallmarks—an ongoing, systemic awareness of the “state of the campus” and the “state of higher education” regarding the interconnectedness of diversity and quality, an active process of engaging diversity in the service of learning, and the courage to reflect on our efforts and to improve them where needed. Please visit AAC&U’s Web site ([www.aacu.org](http://www.aacu.org)) for updates about the Making Excellence Inclusive initiative, including the evolving resource collection that will support our shared endeavor of helping all students develop the intellectual, social, emotional, cultural, and civic capacities needed to lead in this new century.

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Dynamics, Societal Inequities, and Workforce Needs. Next, we discuss the challenge of expanding access and maintaining quality in higher education by examining key **elements of organizational culture**—Mission, Vision, Values, Traditions, and Norms—that must be attended to in creating inclusive and excellent learning and professional environments. We then draw on several organizational change frameworks (Berger and Milem 2000; Birnbaum 1988; Bolman and Deal 2003; Hurtado and Dey 1997; Hurtado et al. 1999; Smith et al. 1997) to examine inclusive excellence through the five **dimensions of organizational behavior**: Systemic, Bureaucratic/Structural, Collegial, Political, and Symbolic.

Moving into action, we discuss how campus leaders can develop and use an **Inclusive Excellence “Scorecard”** to execute organizational change in terms of Access and Equity, Campus Climate, Diversity in the Informal and Formal Curriculum, and Student Learning and Development. We then present the **Inclusive Excellence Change Model**, which integrates these theory and action pieces. Finally, we conclude by identifying a few critical **“next steps”** for campus leaders undertaking the important and complex work of achieving inclusive excellence in higher education.

### **The External Environment**

Colleges and universities are open systems, in constant interaction with the external environment in the exchange of finite resources. Students, faculty, financial resources, laws, and the state legislature can all be considered inputs from the environment. These inputs combine with a campus’s processes and infrastructure to produce outputs. The campus–external environment relationship is dynamic, and while it is beyond the scope of this paper to address all of the external factors that affect higher education leaders’ efforts to make excellence inclusive, we focus on four critical dimensions: (1) political and legal imperatives, (2) shifting demographics, (3) persistent societal inequalities, and (4) workforce imperatives (Hurtado and Dey 1997; Tarbox 2001). Table 1 summarizes each dimension and its respective implications for making excellence inclusive.

**Table 1. External environment overview**

At the same time, the political dynamics that bring about new laws also affect organizations directly (Ibarra 2001). Challenges to diversity in Texas, California, Maryland, and Michigan point to the increasing pressure external political forces are placing upon higher education, especially in the area of college admissions. These challenges are often backed by politically conservative organizations outside of higher education, such as the Center for Individual Rights and the Center for Equal Opportunity, which have funded litigation, conferences, and strategies to dismantle affirmative action and the legislative legacies of the Civil Rights Movement (Cokorinos 2003). The result is that over time, laws, rulings, and policies have shifted—from promoting nondiscrimination to promoting equal opportunity and affirmative action, and most recently, to challenging affirmative action as a form of reverse discrimination and focusing on individual rights (Cokorinos 2003). The current, “post-Michigan” environment is one where educational leaders are challenged to move beyond mere compliance to reaffirm diversity and inclusion as core elements of the learning enterprise and essential to academic excellence.

### Shifting Demographics

Organizations adapt to meet the demands of the external environment, and recent U.S. census and other data suggest a greater opportunity than ever before to diversify higher education (Justiz 1994). With the emergence of unprecedented markets of students from ethnically and racially diverse backgrounds, for example, pressure exists for campus leaders to align structures and processes to better meet the academic, cultural, and social needs of *all* students entering higher education and to better utilize such diversity in the service of learning. At the same time, campuses may have little or no additional resources to meet new demands. The challenge for educational leaders will be to take stock of current processes, resources (human, financial, technical, etc.), and structures and realign them around a broad vision of inclusive excellence. In this way, institutional efforts can be designed with shared responsibility across units and departments. Specific departments or units—such as a multicultural affairs office—can provide valuable expertise and experience to guide such efforts, but in this new framework they would not be solely responsible for the work.



## Persistent Societal Inequities

Demographic changes do not automatically result in an ethnical

competition of today's global economy, organizations that are best at attracting, retaining, and using the skills of diverse workers will enjoy a competitive advantage over their peers.

But the economic need for inclusive excellence is greater than just providing a more diverse pool of candidates for the workforce. Equally important is the evidence that all candidates would benefit from being educated in diverse learning environments. Recent research shows that students in environments where diversity is engaged through the curriculum and cocurriculum have more sophisticated cognitive and affective abilities (Gurin et al. 2002) as well as community involvement and interest in the public good (Bowen and Bok 1998) than students

## **Organizational Culture of the Academy**

In the dominant culture of the academy, inclusion and excellence would seem to be in conflict with one another. Institutions that have succeeded in expanding access, such as community colleges and open-admissions four-year institutions, are often assumed to have a low level of institutional quality (Richardson and Skinner 1991). At the same time, selective liberal arts colleges and research institutions that focus intensively on traditional indicators of quality (e.g., standardized test scores), risk overlooking good candidates from historically underrepresented and underserved populations.

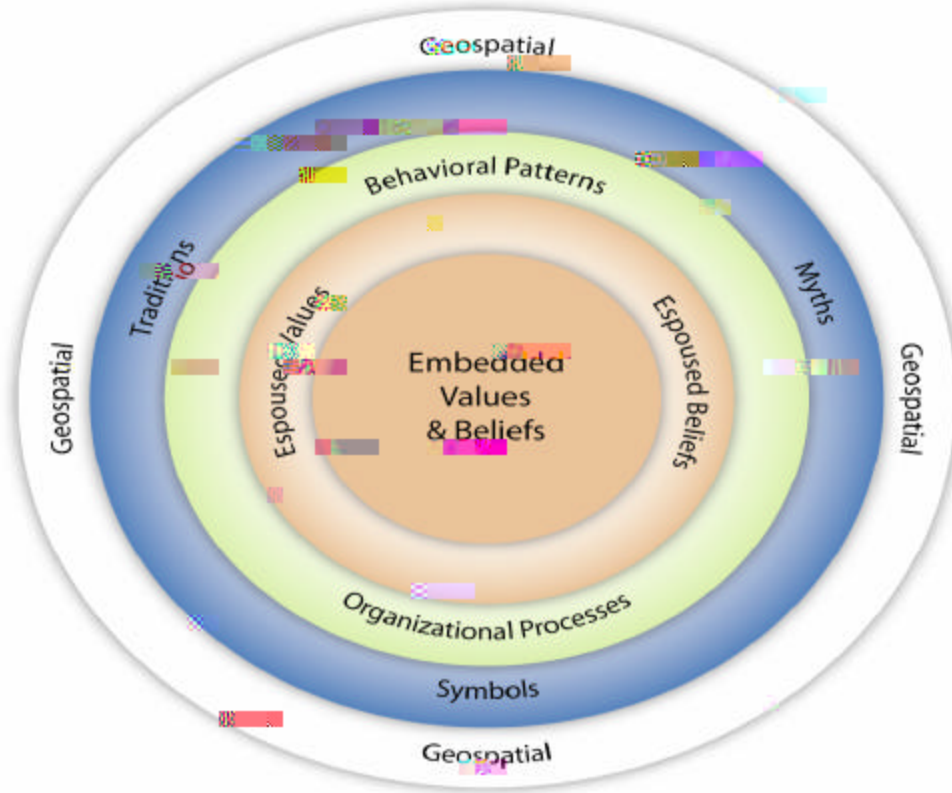
The perceived conflict between inclusion and excellence is asserted with no evidence, based on a dominant, industrial model of organizational values that defines excellence in terms of student inputs without consideration of value-added organizational processes.<sup>2</sup> This narrow notion of excellence limits both the expansion of student educational opportunities and the transformation of educational environments. As a result, too few people from historically underrepresented groups enter into higher education, and those who do may be pressed to assimilate into the dominant organizational cultures of colleges and universities (Ibarra 2001). Another consequence of this model is the continued investment of social capital in these traditional indicators, resulting in an American postsecondary system that reproduces dominant patterns of social stratification.

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of these students in campus brochures and may recruit at more racially diverse high schools, but these attempts are usually done only within admissions and enrollment management and do not influence the larger norms and practices of the institution. This example can be characterized as a first-order change, one that is routine and surface-level. Second-order change, in contrast, is deeper, deals with core values and norms, and is more systemic and enduring (Hanson 2003). How, then, can campus leaders work toward the significant second-order change needed to make excellence inclusive?

It is easier to consider what it means to create transformational change when one “unpacks” the multiple layers of organizational culture within colleges and universities. Argyris (1999) notes that organizational learning—the reflection needed to promote enduring change—

Figure 1. Schema of organizational values (adapted from Schien 1985)



The second level, comprised of traditions, myths, and symbols, is less tangible and represents patterns of thought and action that are more unique to a specific campus. Examples include graduation ceremonies, campus logos, and well-known campus stories and sagas. The third level is comprised of routine, “everyday” behavioral patterns and organizational processes that are even harder to change. Examples might include established practices that separate student affairs and academic affairs, such as different reporting lines and different committee responsibilities across campus.

Both this level and the fourth level, espoused values and beliefs, most closely reflect the core of an organization’s culture—deeply embedded values and beliefs. This is the most intractable level of organizational culture, where relatively little public, shared meaning may exist. Individuals across campus who easily share an understanding about the purpose of the bookstore, for example, may share very little understanding about the educational benefits of an inclusive campus environment or even what constitutes academic excellence. The task, then, becomes identifying how to create powerful enough organizational learning so that deep and transformational change occurs.

## **Organizational Behavior**

Transformational change to make excellence inclusive is unlikely to occur without multiple ways of viewing the processes and practices that spring from the deepest levels of organizational culture. Berger and Milem (2000) present such a multidimensional approach to

relatively recent demographic and economic imperatives in the external environment create a strong impetus to be more expansive.<sup>3</sup>

Higher education is constantly buffeted by a variety of external influences, some of which reinforce traditions and standard operating procedures. Others provide pressure and opportunities for change. External influences that tend to reinforce organizational behavior across higher education include professional norms transmitted through disciplinary societies and professional associations, traditional mental models and philosophies of education, and regulations mandated by governmental and accreditation agencies. These entities generally emphasize traditional measures of academic excellence and rewards systems and deemphasize less traditional measures of talent and excellence. Other external forces, such as the increasing diversity of the U.S. population, can compel campuses to generate new organizational processes and structures. To make excellence inclusive, campus leaders must examine the pressures for and against transformation and align external forces, when possible, to move forward.

#### The Bureaucratic/Structural Dimension

The bureaucratic/structural dimension is perhaps the most common frame of reference used when thinking about organizations, including colleges and universities. From this perspective, organizations exist primarily to accomplish clearly articulated and rational goals and objectives (Berger and Milem 2000; Birnbaum 1988), and are best characterized as hierarchical, complex, systematic, specialized, and controlled by adherence to rules. In higher education, many administrative functions are centrally controlled through formal chains of command, and campuses require numerous lateral coordinating mechanisms to overcome the challenges of vertical control found within these systems.

Because of this, campus leaders must pay attention to formal structures that can act as either barriers or conduits to educational transformation. To achieve inclusive excellence, leaders would be wise to initiate activities that are consistent with established procedures for how change is achieved, namely, through the formal structure, rules, and roles of the institution. If transformation is to be successful, senior administrators must examine and be willing to re-engineer existing institutional hierarchies and resource allocations. One action step might be to

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<sup>3</sup> “External” may be inappropriate here, as key aspects of the environment (professional norms, governmental regulations, accreditation standards, etc.) are embedded in institutional structures and are primary determinants of organizational action.

develop a senior position for diversity that reports to the president or provost and is organized to have an impact on the curriculum, climate, and demographic makeup of the student, faculty, and staff populations. Another might be to establish standing committees that have a specific function, role, and set of duties to perform with respect to making excellence inclusive.

Ideally, creating a senior diversity position would *not* entail creating a vice president for multicultural affairs position that oversees only the minority affairs office. To help effect transformational change, this position must be broadly empowered within the administrative hierarchy, thus sending a formal and symbolic message that these efforts are a strategic priority.

Similarly, campus leaders should avoid common pitfalls associated with establishing committees. Too often, a committee is formed without clear goals, a timeline for work completion, adequate credibility and leverage, or sufficient resources to get the job done. In such cases, the committee itself can become the “solution” rather than a channel through which to create change. In addition, campus leaders often ask the same individuals to serve repeatedly because these individuals—often people of color—have a personal commitment to this work. il create student,jTv









(e.g., in staff promotion), also critical is the message conveyed to the community about the institutional support and value of this work. While it is true that many institutions invest too heavily in symbols without leveraging the necessary political, financial, and structural resources to enact deeper change, cultural change will not happen unless the symbolic dimension is actively aligned with these other areas.

### Integrating the Dimensions

To make excellence inclusive, it is essential to understand organizational structures and examine organizational behavior along these multiple dimensions. A multidimensional framework as relates to inclusive excellence is outlined in table 2.

**Table 2. Multiple dimensions of organizational behavior as relate to Inclusive Excellence**

Systemic Dimension	<ul style="list-style-type: none"> <li>• Examine professional norms that permeate higher education and work to change those norms that limit ability to think and act in ways conducive to Inclusive Excellence</li> <li>• Facilitate organizational learning to expand traditional notions of educational excellence and equity</li> <li>• Engage in intentional campus-based efforts to reshape accreditation and other professional standards to be more reflective of Inclusive Excellence values</li> <li>• Take proactive role in shaping political and legal environment to create regulatory mechanisms that reward rather than prohibit Inclusive Excellence</li> <li>• Tap the growing diversity of the U.S. population as a base for expanding the human, material, and symbolic resources available to higher education</li> <li>• Utilize marketing and dissemination strategies to increase awareness about the educational benefits of diversity among the public, policy makers, and other external stakeholders</li> <li>• Build alliances with external partners interested in promoting Inclusive Excellence</li> </ul>
Bureaucratic/Structural Dimension	<ul style="list-style-type: none"> <li>• Define formal goals to support Inclusive Excellence</li> <li>• Prioritize Inclusive Excellence</li> <li>• Clearly articulate goals, strategies and values</li> <li>• Vertically coordinate goals at various levels</li> <li>• Horizontally coordinate goals across units</li> <li>• Routinize strategies and processes for Inclusive Excellence</li> </ul>
Collegial Dimension	<ul style="list-style-type: none"> <li>• Expand definitions of consensus building</li> <li>• Develop models of collegiality</li> <li>• Engage numerous parties in change process</li> <li>• Build coalitions across campus to support Inclusive Excellence</li> <li>• Develop forums for open communication</li> </ul>
Political Dimension	<ul style="list-style-type: none"> <li>• Recognize existing power bases</li> <li>• Address vested interests regarding Inclusive Excellence</li> <li>• Mobilize change agents in the pursuit of Inclusive Excellence</li> <li>• Cultivate strategic alliances</li> <li>• Redis tribute resources to support transformative initiatives</li> </ul>
Symbolic Dimension	<ul style="list-style-type: none"> <li>• Clearly identify core values with respect to Inclusive Excellence</li> <li>• Articulate new values through symbols</li> <li>• Recognize how meaning is constructed at multiple levels</li> <li>• Acknowledge and redress any campus history of inequity/inequality</li> </ul>



diversity in a manner that is balanced between outcomes (access and retention) and process (receptivity and excellence) can be traced to the balanced and academic scorecard tools first described in the business literature and later adapted to the higher education and non-profit sectors (Bensimon 2004; Kaplan and Norton 1992; O'Neil et al. 1999).

A scorecard can be used to align a change vision with bureaucratic structures, day-to-day

**Table 3. Inclusive Excellence Scorecard**

IE Area	Definition	Sample Indicators	Source
Access and Equity	The compositional number and success levels of historically underrepresented students, faculty, and staff in higher education	<ul style="list-style-type: none"> <li>§ Number of students, faculty, and staff members of color at the institution</li> <li>§ Number of tenured women faculty in engineering</li> <li>§ Number of male students in nursing</li> <li>§ Number of historically underrepresented students in science, technology, engineering, and mathematics (STEM) fields</li> </ul>	Bensimon et al. 2004; Hurtado, et al. 1999; Smith et al. 1997
Diversity in the Formal and Informal Curriculum	Diversity content in the courses, programs, and experiences across the various academic programs and in the social dimensions of the campus environment	<ul style="list-style-type: none"> <li>§ Courses related to intercultural, international, and multicultural topics</li> <li>§ Campus centers, institutes, and departments dedicated to exploring intercultural, international, and multicultural topics</li> <li>§ Articles, monographs, lectures, and new knowledge that is produced around issues of diversity</li> </ul>	Smith et al. 1997
Campus Climate	The development of a psychological and behavioral climate supportive of all students	<ul style="list-style-type: none"> <li>§ Incidents of harassment based</li> </ul>	0.5 0 569.Tc 0.01392 T627139 Tc -015014 Tve § obevengorina, mg ethnicf ayl,

#### Four Areas in which to Enact and Assess Change

*Access and equity.* Access and Equity consists of more than simply tracking changes in the representation of historically underrepresented students, faculty, and staff. From this perspective, inclusive excellence involves the representation and equitable achievement of these groups on campus. Table 4 provides an example of what a portion of a scorecard might look like from the vantage point of access and equity. One objective in this example involves equity of historically underrepresented students in the science, technology, engineering, and mathematics (STEM) disciplines. Specific strategies, such as identifying students in middle school and helping them develop and achieve academically toward enrollment at the institution, as well as



creating an academic success and leadership program to ensure student success once in college, are illustrated.

**Table 4. Sample portion of IE Scorecard for access and equity**

<b>Perspective</b>	<b>Goal</b>	<b>Objective</b>	<b>Strategies</b>	<b>Measures</b>
Access and Equity	To achieve equity of representation and outcomes for ethnic and racially diverse minority students in our undergraduate student population to mirror that of our state			

*Campus*

One important finding of recent years is that it is not simply the presence of ethnic and racial diversity on campus, but rather the *active engagement* with that diversity that is critically important for fostering student learning and development (Gurin et al. 2002). As such, informal interactions with diverse peers may prove to be as important as the formal curriculum in terms of promoting the student development and learning that comes from intercultural interactions (Gurin et al. 2002). Such interactions must also be included in the indicators developed to assess inclusive excellence. In addition, student participation in diversity education programs (formally part of the curriculum or co-curriculum), such as the University of Michigan's Program on Intergroup Relations, must also be considered and their impact evaluated.

One challenge to building this area into an institution's IE Scorecard is to do so in a way that develops measures in terms of both breadth and depth. It is not enough to simply have a two-course diversity requirement, fifteen "diverse" majors, and a living-learning program focused on diversity and intergroup relations. When developing indicators for this area, it is important to capture not only the type and quality of offerings that are present but also the levels and quality of student engagement in each.

*Learning and development.* The student learning and development area is closely related to the curricular area and focuses on both learning and democratic outcomes (Gurin et al. 2002). Learning outcomes include active thinking skills, intellectual engagement and motivation, effective written and oral communication, and group problem-solving ability. Democratic outcomes include the ability to take the position of another person, racial and cultural understanding between and among groups, acceptance of conflict as a normal part of life, capacity to perceive differences and commonalities both within and between social groups, and interest in the wider social world and civic engagement (Gurin, et al. 2002).

Similarly, AAC&U's *Greater Expectations* report (2002) outlines a set of contemporary liberal education outcomes important for all students regardless of academic specialization. Developed out of an analysis of promising educational practices nationwide, these outcomes include the ability to think critically and to integrate knowledge across domains, intellectual inquiry and motivation for lifelong learning, intercultural communication skills, social responsibility and the ability to function in a diverse democracy, and the ability to solve problems in diverse groups and settings.

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tactics, and metrics to guide their efforts. Furthermore, they must be held accountable for their plans by senior administrators.

The process of achieving an aligned scorecard throughout the organization is referred to as “cascading” (Bensimon 2004; Kaplan and Norton 1992; O’Neil et al. 1999). A scorecard decentralizes the change vision and provides everyone with the opportunity to contribute to the vision at multiple levels of the institution. By having each unit develop a portion of the scorecard from its own vantage point and across the four areas, the change effort is more quickly institutionalized into the core values, beliefs, and processes of the campus. Some organizations have taken this process to the individual level, with employees developing personal work and development plans that are based upon the overarching scorecard. Whether used at the individual or unit level, the scorecard process will help deans, vice presidents, directors, and others demonstrate their contributions to overall organizational goals for making excellence inclusive.

*Capacity-building.* Any implementation of a set of strategies to make excellence inclusive must focus on building long-term organizational capacity. “Quick fixes” will not sustain the long-term commitment that is necessary to do this work. If institutions desire high-level outcomes across various dimensions of the IE Scorecard, change efforts must invest in building infrastructure and developing faculty, staff, and unit capabilities.

We have previously discussed the importance of aligning bureaucratic structures to support efforts to make excellence inclusive. An example of such capacity-building in the curriculum and cocurriculum would be to redirect a permanent staff person to help faculty and staff reshape content and teaching to reflect the institution’s inclusive excellence goals. An example within access and equity would be to develop a targeted hiring program—with a name, application process, annual budget, and a development officer charged with raising money to endow the program—to diversify the faculty and staff.

*Leveraging resources.* Change cannot happen unless the necessary financial, technical, human, and symbolic resources are made available to drive the process. New initiatives either require a reallocation of current resources or additional resources. This means making financial decisions that help put into action an institution’s espoused values regarding inclusion and excellence.

Too often, the model to fund diversity efforts has been to tack on a few resources and look to the minority affairs office to create change for the campus. In contrast, to make

excellence inclusive such that all stakeholders share in the efforts, campus leaders must develop funding models that reallocate significant resources to support widespread organizational transformation. For example, during the late 1980s, leaders at the University of Michigan called for every unit in the entire university to allocate one percent of their total operating budget to a central fund that was used to develop diversity programs and initiatives. This fund was then permanently reallocated to support diversity initiatives on campus through several different channels. This resource allocation process was highly formalized and authoritative and leveraged the vision of that institution's president. Although not all institutions will have this type of change agent in place to take such an approach, institutions must find ways to allocate the necessary financial resources to make change happen.

In addition to financial support, institutions must also leverage other types of resources to make change happen. For example, a letter of endorsement from the provost can send a powerful symbolic message to deans regarding the importance of a particular set of strategies to make excellence inclusive. Again, the key is for institutional leaders to know when and how to leverage such resources.

### **The Inclusive Excellence Change Model—An Overview**

Figure 3 presents the integration of the elements described in this paper into an Inclusive Excellence Change Model. At the heart of the model is *Inclusive Excellence*, where educational excellence cannot be envisioned, discussed, or enacted without close attention paid to inclusion. The model operates from the outer layer inward, bringing *the external environment* into play with the *behavioral dimensions* through which *organizational culture* can be understood. This understanding, in turn, readies a campus for the *IE Scorecard's* comprehensive goals, benchmarks, and measures for change, as well as a comprehensive strategy for getting there and measuring progress. Table 5 summarizes each element and its respective components. The model illustrates the critical areas that campus leaders must address as they plan for the comprehensive change needed to make excellence inclusive.





**Table 5. Inclusive Excellence organizational change framework**

<b>Elements</b>	<b>Definition</b>	<b>Components</b>
External Environment	Environmental forces that drive and constrain implementation of inclusive excellence.	Shifting Demographics Societal Inequities Workforce Needs Political and Legal Dynamics
Organizational Behavior Dimensions	Multiple vantage points that must be used to shift the informal and formal environmental dynamics toward inclusive excellence.	Systemic Bureaucratic Symbolic Collegial Political
Organizational Culture	Dynamics that define higher education and that must be navigated to achieve inclusive excellence.	Mission Vision Values Traditions Norms
IE Scorecard	Comprehensive framework for understanding inclusive excellence that extends and adapts work on diversity scorecards and dimensions of the campus climate.	Access and Equity Diversity in the Formal and Informal Curriculum Campus Climate Student Learning
Inclusive Excellence Change Strategy	Fluid institutional strategy to make inclusive excellence a core capability of the organization.	Senior Leadership Vision and Buy-In Capacity Building Leveraging Resources

### **Conclusion: Next Steps**

The purpose of this paper has been to provide campus leaders with a new integrative model covering vision, processes, and outcomes that maps out the comprehensive change needed to make educational excellence inclusive. We feel that inclusive excellence is higher education’s most appropriate response to the extraordinary shifts—from evolving technologies, to unpredictable economic markets, to persistent and even increasing inequity, to changing demographics—taking place in the U.S. and around the world. This type of transformation will only occur as campus leaders recognize that the external environment can no longer be viewed as an entity to be buffered by boundaries, but instead as an influential element that is part of a larger organizational system.

Likewise, many of the traditional values, norms, and structures found in higher education are barriers to realizing the benefits of inclusive excellence and must be undone for these efforts to become a sustainable reality on campuses. A new organizational culture will only become a reality if campus leaders understand all of the relevant dimensions of organizational behavior—systemic, bureaucratic, collegial, political, and symbolic.

To enact organizational change across these dimensions, campus leaders would benefit from using a scorecard to plan and monitor progress in terms of both process and outcomes. They would also benefit from having a comprehensive strategy that builds capacity for change efforts to take hold broadly and deeply in the institution and to be sustained and advanced over time.

The model provides a synthesis of useful information that can help guide campus leaders in their quest to develop leading institutions for inclusive excellence. Institutions that best reorganize to make excellence inclusive will greatly expand their ability to better serve all of society while simultaneously increasing their access to the material and symbolic resources to be found in a rapidly diversifying American society.

To embrace a vision where educational excellence is fundamentally and inextricably connected to inclusion, campus leaders need the empirical evidence and leadership tools to help guide them into this largely uncharted territory. New research and tools are necessary to demonstrate broad social, economic, and democratic gains that come from making excellence inclusive, to help campus leaders make the case for inclusive excellence to their various publics and constituents, and to understand the most promising ways to go about this work.

Leadership, organization, and governance are not ends in themselves, but rather are means for achieving important educational objectives and learning outcomes. This model is a preliminary step that we hope will help make inclusive excellence a reality at colleges and universities across the country.

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