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Tools for a Time and Place: Phased Leadership Strategies to Institutionalize a Diversity Agenda

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Campuses across the country are working to create more inclusive environments in which students, faculty, and staff of different backgrounds can succeed (Bauman, Bustillos, Bensimon, Brown, & Bartee, 2005; Harvey & Anderson, 2005; Ibarra, 2001; Smith & Associates, 1997). One of the most common approaches to create a more inclusive environment is the development of a diversity agenda or initiative.¹ Diversity initiatives are multifaceted and have several broad goals including developing an understanding of diversity; infusing attention to differences by race, sexual orientation, and gender; and creating greater equity and parity in the experience and outcomes of individuals from diverse backgrounds (Hale, 2004; Hurtado et al., 1999; Musil, Garcia, Hudgins, Nettles, Sedlacek, & Smith, 1999; Smith, 1989). A diversity agenda attempts to integrate diversity into the structure, culture, and fabric of the institution—so that it is truly institutionalized (Curry, 1992; Davis, 2002). The American Association of College and Universities has a series of publications about diversity agendas/initiatives

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¹Leaders and the literature use *agenda* and *initiative* interchangeably; therefore, I use both terms in the paper.

that include descriptions of the importance of committed leadership (e.g., Bauman et al., 2005; Milem, Chang, & Antonio, 2005; Musil et al., 1999; Smith & Associates, 1997). This article complements these publications by providing a detailed examination of phased leadership strategies, a topic they leave unexplored.

Although many college campuses have a commitment to creating an inclusive environment, they face challenges in trying to implement a diversity agenda. A key element for advancing a diversity initiative and overcoming barriers is leadership (Hurtado et al., 1999; Musil et al., 1999; Smith, 1989; Smith & Wolf-Wendel, 2006). In particular, positional leaders such as college presidents are able to impact the entire institution based on their authority and have several mechanisms they can leverage to create change—for example, control of the budget, planning processes, hiring, and evaluation (Birnbaum, 1988; Kezar & Eckel, 2005; Musil et al., 1999). Yet while presidents can have a significant impact on institutionalization, many presidents and leaders are not successful at institutionalizing change related to diversity.

One dilemma leaders face in implementing and institutionalizing a diversity initiative is understanding what strategies are needed and at what time or phase (Milem, Chang, & Antonio, 2005; Musil et al., 1999). Some campuses have no diversity agenda, other campuses have an agenda which lacks energy; while on still others, an agenda has stopped making progress and hit a set of barriers. Each of these situations likely requires different forms of leadership. While leaders can certainly use a variety of strategies to create change, research demonstrates that, by focusing on the right strategies at the right time and consolidating efforts, leaders maximize human and financial resources and are more successful in institutionalizing change (Kezar, 2001). Furthermore, research from institutionalization suggests that different strategies are needed in each phase of institutionalization, yet the relationship between various stages of institutionalization and leadership strategies remains understudied and not well understood (Curry, 1992; Kramer, 2000). The focus of this paper is understanding the relationship between the process of institutionalizing a diversity initiative and the most efficacious leadership strategies.

In this study, I examined a set of successful college presidents who have transformed their campuses, focusing on strategies that they used to provide guidance and practical advice so that leaders on other campuses can derive guidance and practical advice from the successful experience. I identified institutions at different levels of institutionalization in order to understand what strategies are needed at different phases. I examine the questions: Do campuses at different stages of institutionalization in their diversity agendas use different strategies? If so, why? And how do different strategies help move the campus toward institutionalizing a diversity agenda?

THEORETICAL FRAMEWORK

Leaders at campuses across the country describe themselves as engaged in a process of implementing a diversity agenda or initiative. In describing what they mean by that term, presidents note that they are attempting to make the campus an inclusive environment for individuals from diverse backgrounds and that the efforts are aimed at impacting all facets of the organization (including policies, practices, structures, and the climate/culture), and making diversity part of daily practice and operations. These personal definitions of their diversity agenda reveal that they are typically describing the process of institutionalization.

Defining Institutionalization

Institutionalization is defined as establishing a standard practice or custom in a human system (Curry, 1992; Kramer, 2000). The following characteristics are typically associated with an institutionalized practice: routine, widespread, legitimized, expected, supported, permanent, and resilient (Kramer, 2000). Change per se may not be sustained, but leaders who are committed to creating more inclusive campus environments are committed to institutionalizing change. They do not see diversity as an experiment, like an innovative pedagogy that, once tried out, they may not want to maintain. They are not wondering whether the project of promoting greater inclusiveness will meet organizational goals and whether the concept itself needs to be evaluated. Instead, leaders are engaging in the process of moving a diversity agenda forward to institutionalize a new way of doing work.

Institutions are systems that define the behaviors within them so that certain qualities can be sustained in a routine way. Institutions work very hard to preserve their identity through programs, policies, and procedures. To institutionalize a practice often requires organizations to modify reward structures, policies, and the environment. However, for any given innovation, different aspects of the organization might need to be modified to ensure that it has staying power and is routinized (Curry, 1992). For example, with a technology innovation, training and providing infrastructure might be particularly important, while institutionalizing service learning might require change in promotion and tenure requirements and centralized resources for logistics.

Institutionalization Phases

Before a practice is institutionalized, it moves through phases that appear to have some predictable elements (Goodman et al., 1982; Kramer, 2000). The literature often describes three phases: mobilization, implementation, and institutionalization. Some researchers use different terms for these three phases:

- critical mass building, quality building, sustains institutionalization
- beginning work, emerging work, systemic work
- exploring, transitioning, transforming
- or capacity building, widespread use and support, systemic integration

Regardless of terminology, almost all studies identify three phases or stages (Kramer, 2000). While it is often difficult to determine where one phase ends and another begins because the change agenda is unfolding dynamically, I will refer to the phases by number. Over the course of these phases, capacity is built, support cultivated, and systemic integration facilitated.

Phase 1 (mobilization) typically involves becoming aware of the innovation or change, exploring and understanding the change, creating support systems, and making some attempts to perform the behavior (Curry, 1992). Several researchers of institutionalization describe how the process begins by focusing on establishing concrete ways that the innovation is represented through organizational structures: the structural level.

In Phase 2 (implementation) a variety of processes and structures are put in place to support the behavior, people begin to have a preference for the behavior/practice, and the policy and behaviors start to become more common and part of the standard operating procedure (Curry, 1992). This phase is often focused on the procedural/behavioral level.

Phase 3 (institutionalization) typically involves people holding a practice as a core value that undergirds their work. In this stage, the organization accepts the values and norms associated with the innovation and incorporates them into its culture; there is normative consensus. This is often referred to as the cultural level.

Institutionalization and Leadership

Institutionalization also provides an important theoretical framework for understanding the role of leaders in creating change (Kezar, 2001). Scholars of change focused on institutionalization suggest that leaders need to use different strategies when an initiative is new to an organization than when the initiative has begun to be incorporated into the organization (or institutionalized). Curry (1992) hypothesizes that leaders need to help people on campus first recognize the need for change, mobilizing and energizing individuals to make that change. At a later stage, they proceed to developing and implementing programs and initiatives; and, lastly, they work to stabilize the change and make it part of the ongoing operations of the organization. A manifestation of this step would be including it in the evaluation and budget processes.

In reflecting on the three different phases of institutionalization, it becomes apparent why different leadership might be needed at each stage. For example, researchers have described the importance of the “leadership of attention” or “priority setting” at Phase 1 (Kotter, 1988). Here leaders focus

on developing a vision or direction. It is also important that they focus on the management of meaning—communicating their vision and helping people see the value and importance of that vision.

At Phase 2, leadership focuses on building momentum; therefore, leaders need to create incentives and opportunities for people to become involved (Curry, 1992; Kanter, 1989). They also need to play the role of inspirational leader, using persuasive skills to help people want to become involved. Lastly, in Phase 3, leaders need to be cultural agents, focusing more on the value and meaning of the innovation (Schein, 1985). Leaders need to help build cultural consensus for the innovation. Here, leaders help people sort out conflicting values that they might hold. For example, faculty may be committed to social justice and equity but hold views about hiring criteria that conflict with their beliefs in equity. During Phase 3, leaders help bring to the surface conflicts that create barriers and resistance and that can prevent institutionalization.

While research has definitively identified stages of institutionalization, less research has been conducted about the leadership required at each phase (Curry, 1992). Several scholars hypothesize a link between phases of institutionalization and leadership strategies (Curry, 1992; Kanter, 1989; Schein, 1985), but only a handful of studies have examined this link (Kramer, 2000). This study attempts to build on earlier research and provide evidence for the relationship between stages of institutionalization and leadership practices that are successful and necessary at each phase. Table 1 summarizes some of the hypothesized relationships between leadership approach and phases of institutionalization.

Understanding Diversity Initiatives by Phases

In addition to using the literature on institutionalization to understand ways that leadership practices might vary by stage of institutionalization, I also used the institutionalization framework to examine the campuses involved in the study and determine their level of institutionalization when the new president was installed. I broadened my use of this literature by also examining literature related to campuses working on diversity to identify how scholars have conceptualized phases of institutionalization (Hurtado et al., 1999; Smith, 1989; Smith & Wolf-Wendel, 2006). My particular focus was examining the data collected to see if institutions appeared to fall into distinct categories and, if so, the distinctive characteristics of each stage. I looked for patterns outside the framework, bracketed out my own assumptions, and also had other reviewers check the emerging phases. In the end, a three-stage model emerged that closely followed the stages identified by the institutionalization literature: (a) Phase 1, mobilization; (b) Phase 2, implementation; and (c) Phase 3, institutionalization. Here is a general description of these three phases:

TABLE 1
LEADERSHIP TASKS AND PHASES OF CHANGE INITIATIVES

<i>Phase 1: Structural</i>	<i>Phase 2: Behavioral</i>	<i>Phase 3: Cultural</i>
Set priorities	Build momentum	Focus on the meaning of the change
Develop vision and direction	Provide rewards and incentives	Build consensus around values
Communicate vision	Create opportunities for involvement	Help people sort values
Explore meaning of the change	Act as inspirational leader and persuader	Resolve values conflicts
Create support systems	Create more systemic support systems	Make part of on-going operations, e.g., budget and evaluation
Energize people		

Phase 1 institutions often have no diversity agenda, and few conversations about diversity are occurring. These institutions manifest little or no awareness about the importance of diversity. There is no general campuswide commitment to diversity. However, if campuses described a commitment to diversity, they characterized it by a focus on access, usually not mentioning retention and success. Discussions about diversity were often considered difficult, were conceptualized as bringing up conflict, and were often related to a racial incident on campus. Any diversity efforts that were underway were compartmentalized and marginalized to a particular unit. Lastly, they had few interventions specifically designed to support students of color and create an inclusive environment.

Institutions in Phase 2 have a diversity agenda and on-going conversations related to race, gender, social class, and other aspects of diversity. The campuses have a clear rhetoric related to diversity and supporters committed to diversity; they are even beginning to describe the importance of moving from rhetoric to action. These campuses are characterized by various intervention programs that are less compartmentalized than those in Phase 1. While they are usually not working in a unified effort, leaders and intervention programs across campus are loosely coordinated. More references to retention and success occur.

Finally, institutions in Phase 3 have mostly institutionalized a diversity agenda. There is less rhetoric or conversation on the topic because it is insti-

tutionalized in campuswide practices. Interestingly, campuses that have an institutionalized diversity agenda emphasize diversity less in their printed materials and on their websites than campuses in the middle phase. These campuses have moved from rhetoric to action and have regular monitoring mechanisms to keep track of their diversity efforts and ensure they are making progress. These campuses use data and monitoring practices on a regular basis and are very aware of their annual progress towards diversity. They regularly conduct campus climate surveys and find ways to keep in touch with the pulse of the campus. They focus more on outcomes and success and less on access and retention. They also focused more on specific populations. They are not reflecting on the success of “Hispanic” students as much as “Mexicans,” “Puerto Ricans,” and other subgroups. They describe diversity in complex ways, looking at the overlap of gender, race, and social class, in addition to looking at racial subgroups.

While it may seem obvious that these different phases require different leadership strategies, no empirical studies have described how leaders on college campuses might approach a diversity agenda at different phases. I am not suggesting that there have not been studies of the phases of institutionalizing diversity; however, these studies have not examined the nexus of the leadership required at different institutional phases. Theories of institutionalization support the need for research on these different phases, providing leaders with strategies appropriate to the time/phase.

METHODOLOGY

To understand the relationship between president’s leadership strategies and phases of institutionalizing a diversity initiative, the research team² pursued a qualitative approach through “elite interviews” with 27 college presidents (Dexter, 1970; Holstein & Gubrium, 1995). Researchers using this methodology identify individuals who are experts in the area and can provide insight about the issue of interest—in this case, presidents who had been successful at advancing a diversity agenda on campuses at different phases of institutionalization (Merton, Fiske, & Kendall, 1990).³

Sample

The choice of interviewees was driven by three primary criteria related to expertise: (a) presidents who had made significant progress in advancing a diversity agenda, as identified by national experts on diversity in higher

²While a research team, including me, collected the data, I authored the paper. Therefore, in this section, I refer to a team and “we” while in other sections I use “I.”

³For this methodology, see other articles on the presidential leadership project, which is part of a larger study (Kezar & Eckel, 2005).

education; (b) presidents who represented different institutional types or sectors in a variety of settings (rural, urban, and suburban) and different phases on their diversity agenda; and (c) presidents who had a reputation for being reflective about their leadership strategies. To develop an initial list of participants, we asked organizations that are familiar with issues of diversity (such as the American Council on Education's Center for Advancement of Racial and Ethnic Equity and Office of Women in Higher Education) to nominate individuals based on these criteria; we also asked presidents to provide the names of peers whose opinions on diversity-related issues they respected. We did not purposefully sample for age, gender, race/ethnicity, and other criteria, but we made an effort to include a diverse set of respondents. Almost 50% of the interviewees were presidents of color, and more than a third were women. Both the number of women and presidents of color are in greater proportion to presidential demographics than in national studies conducted by the American Council on Education (ACE) (Corrigan, 2003). The final list of potential participants included individuals from every region of the country and all higher education sectors. Selecting these interviewees is a particularly important step in the elite-interview methodology because the trustworthiness of the results is based on identifying individuals with significant experience and expertise (Holstein & Gubrium, 1995).

We purposefully sampled institutions to find schools in all three phases in their diversity efforts to see if strategies differed based on the phase. The final sample included 7 institutions that were in Phase 1 of their diversity initiative, 10 in Phase 2, and 10 that were in Phase 3 at the beginning of the president's term. If institutions evolved during the presidency, we asked them what strategies they used during each phase and whether they saw differentiations in successful approaches or needed strategies. We applied the criteria defined in the literature review to identify the phase for each institution, in addition to asking outside experts and the presidents themselves to identify the phases. Through these multiple indicators, we felt confident that we identified the phases accurately.

Data Collection

Our primary method of collecting data was telephone interviews, given the geographic dispersion and crowded schedules of our interviewees. Ensuring confidentiality and anonymity was extremely important because we wanted to create an environment in which individuals would share information about both strategies that succeeded and those that failed in advancing a diversity agenda. Either or both might challenge traditional opinions (Holstein & Gubrium, 1995; Seidman, 1991).

Because elites have limited time for interviews, a critical step was to provide information and data to their staffs who could then brief the president on the study and interview questions. We gathered background information on the interviewees from websites, press releases, and personal contacts. To

contextualize the interviews, we conducted analyses of institutional websites to identify information related to campus diversity agendas. We combined this information with other context information obtained from documents that we requested from the institutions or that they sent us.

We developed an interview protocol from the literature on diversity and presidential leadership. Two researchers conducted the interviews using a common protocol, but the interviews varied as elites were allowed to move the conversation in directions they felt important. Interviewers attempted to establish an immediate connection with each interviewee, using the information gathered from websites and staff to establish trust and to foster interest in the study as quickly as possible before beginning the formal interview process. Interviews averaged an hour in length and were tape-recorded. Each interviewer also took extensive notes. The interviews were transcribed verbatim.

Analysis

We analyzed the interview data and documents using Boyatzis's (1998) thematic analysis, focusing mostly on both inductive and deductive coding in identifying strategies that leaders used to advance their diversity agenda. Examples of deductive codes include rewards, accountability structures, and evaluation. A variety of inductive codes emerged, including garnering board support, hosting dialogues, facilitating learning, and listening to student voices.

Three different individuals coded the data and compared the strategies identified. Criteria used to identify themes/subcategories for improving performance were: (a) the number of different individuals who brought up the code/theme, and (b) the amount of time they discussed the concept and level of significance they placed on a code/theme.

Trustworthiness and Limitations

The primary method for ensuring trustworthiness was to send a summary of key points and possible quotations from the transcripts to each president, inviting them to ensure that our interpretations matched what they had intended and said in interviews. Later we also provided each president with a preliminary analysis, asking each president to verify the phrase we had identified for his or her campus. They noted no discrepancies beyond a few changes in titles and other minor details.

We additionally ensured trustworthiness by having three different researchers review the interview transcripts and comparing the leadership strategies/approach that they identified and used within each phase, and the level of importance for each.

The data focused on college presidents' perceptions about what strategies/approach were important to them in advancing a diversity agenda at different phases. However, we do not know the extent to which other key

campus stakeholders shared these perceptions and recognize that perceptions of complex organizational phenomena may vary within the same organization (Pettigrew, 1995; Starbuck & Milliken, 1988). Our study focus, however, was on the insights of a particular set of influential individuals who, although widely acknowledged as essential to advancing meaningful change on campus, have not been examined empirically.

Because the actions of leaders are difficult to link with organizational outcomes in higher education (Birnbaum, 1988), we hypothesized that the data obtained from diverse individuals leading different types of institutions would yield adequate confirming and disconfirming data to bring out important and common perceptions. We chose to place significant faith in the wisdom of college presidents as they articulated their observations. The results are words of wisdom from experienced individuals who have worked hard for many years to advance a diversity agenda. Finally because the focus was on presidential leadership, not organizations and their change, we elected not to conduct case studies of each campus to explore the themes presidents described in more detail. Doing so would have added important depth and richness to this study, but the requirement of traveling to 27 institutions was prohibitive.

RESULTS

One of the main themes from the study is that college presidents acknowledge the importance of understanding the institutional phase before moving forward with any activities or plans. Presidents must choose wisely where to focus their time, attention, and resources. All 27 presidents mentioned that they spent the early part of their presidency assessing the campus—getting to know what its issues were, “taking the temperature” of each phase they perceived, and attempting to gauge what strategies and activities were the most important given this assessment. In addition, interviewees who had been appointed president from within their campus—and hence had been on that campus for years—noted that leaders develop biases from past experience as faculty members or administrators and that it was important to check their perspectives by talking with and listening to others. Presidents also described using distinctive strategies within the different phases of the diversity initiative. We briefly summarize the results, then add detail with the president’s own words.

In Phase 1, presidents needed to listen to students, staff, and faculty from diverse backgrounds to help craft a diversity agenda. They needed to show their personal commitment, first, by making it a priority, and then by helping people understand it by developing a rationale for why diversity is important. After crafting the agenda, they needed to motivate people to embrace and understand the initiative. Several strategies helped to provide energy

and movement toward the agenda including mission alignment, board support, and role-modeling. They also needed to build an infrastructure for implementing the diversity agenda, usually beginning with strategic planning and resources, and identifying a person dedicated to diversity and/or to the climate on campus.

Presidents in Phase 2 described the importance of reinvigorating the diversity agenda and, often, of leading it in new directions. During this phase, presidents focused on creating broader support and using strategies such as sponsoring dialogues and campuswide meetings, creating external networks, and hiring new people. Presidents also realized that they needed to demonstrate action and move past rhetoric by measuring progress, hiring faculty of color, and creating safety zones for students.

Presidents on campuses in Phase 3 described the importance of continuing to help the campus learn more about diversity and noted their role in intellectually stimulating people so that they could create innovative interventions and approaches. Presidents became involved in curriculum revision and spent a great deal of time making the connection between diversity and learning. Presidents continued their work with external communities and outreach, often specifically examining the pipeline from high schools to college. Presidents also collected and used data as part of planning and evaluation; accountability became a primary strategy for integrating the diversity agenda and demonstrating progress as well as challenges.

It should be noted that some presidents had tried to use strategies from other phases but met resistance in doing so. At times, trying to use inappropriate strategies (e.g., curriculum revision or targeted campaigns to hire faculty of color) slowed down progress or threatened the diversity agenda entirely. Presidents were more successful if they methodically used certain strategies at the right time.

LEADERSHIP FOR PHASE 1 CAMPUSES

Early-phase presidents have three main tasks: (a) creating and articulating a vision and helping people understand the vision, (b) increasing motivation and energy toward the vision, and (c) developing infrastructure to support the vision's unfolding. These three areas are key to building a foundation to reach the second phase. They are also the areas where leaders need to focus the most effort and energy.

Creating and Articulating the Vision

Presidents spent the beginning of their term listening in order to better understand issues so they could create support for a diversity agenda/vision. While presidents said it was tempting to begin with a set of actions (and it is important to take action quickly), it is also critical for the president to

spend some time listening to people on campus, particularly students, staff, and faculty from diverse backgrounds, to develop the vision.

One president described the importance of becoming acquainted with students:

What is most important early on is really listening to the students and getting out and hearing what's on their mind. I really believe the role of a president is to hear what is out there and respond to it in the agenda.

Another president described the importance of spending the first three to six months of his or her presidency getting to know the environment for diversity:

I spent the first six months going around the campus and understanding what the culture was and listening to the people that work here. I held focus groups with faculty and staff and meetings with students over pizza or chicken wings, whatever would get them there.

Presidents mentioned that faculty, staff, and students from diverse backgrounds acknowledged and thanked them for their effort to understand their experience. This "listening" phrase also developed a level of trust that was important in providing the foundation for moving the diversity agenda forward.

Since most Phase 1 campuses did not have an agenda (or active agenda) in place, it was important for presidents to begin to articulate a vision and direction for the campus. On early-phase campuses, many people will not understand why diversity is important and the president needs to provide that rationale. This rationale (particularly at the beginning) needs to be simple and straightforward. Some presidents mentioned this rationale's serving as a slogan or mantra:

Like anything that's important to you or that's an important part of one's vision, you have to make a clear case for it. And it's not that everyone will agree with it, but you have to make a clear case for it. You have to describe [a commitment and rationale to diversity] in a way that it's elegant and not complex. Excellence and diversity [are] . . . example[s]; even if you disagree with it, you understand it. You don't need to spend a lot of time, so the articulation of that is really very simple. The other thing that you have to do is that you have to talk about it all the time; it needs to be your slogan.

Making the Vision a Priority and Motivating People toward It

While presidents of Phase 1 campuses spent the beginnings of their terms understanding the climate for faculty, staff, and students from diverse backgrounds and articulating a diversity agenda/vision, in the next part of their term they focused energy and motivated people toward the agenda.

The vision will not begin to take hold unless the president describes it as a personal commitment and a top priority, demonstrating this commitment in his or her initial speeches and activities.

The president of one university described the way he made sure that the campus realized diversity was one of his top priorities: “First of all, one needs to, right from the start, get out in front as an advocate for diversity. [Use] campus addresses, convocations, events, and so on, to really talk about the importance of diversity.”

Yet it is not enough to describe his or her personal commitment and sense of priority. People need to understand what this commitment means. Clearly articulating the president’s personal vision and role-modeling her or his commitment to diversity are ways to help people who know very little about diversity to understand it better. In addition to providing guidance for those who are not familiar with diversity, role-modeling also demonstrates a personal commitment to faculty, staff, and students from diverse backgrounds who have often felt let down by other leaders. In the words of one president:

People are watching. That’s why I say, “You lead by example.” One of the things that I did was hiring people of color and women on my office staff, for my senior staff and so on—really showing through action that this was something that I was going to do and something that was important to me.

Early-phase campuses often have a faculty and staff who do not understand how the vision for diversity might relate to the way they do their work. Presidents described how they needed to develop strategies to help people see diversity as the work of everyone on campus, otherwise it could be marginalized to a particular office or seen as the president’s personal vision. One of the main ways that presidents of early-phase institutions helped campus constituents see the relationship between the vision and the work of everyone on campus was by relating the diversity vision to the mission. Two stories by presidents help illustrate this point:

Our mission statement described how a global and multicultural perspective are important for a top quality liberal arts college and for creating a challenging intellectual experience. However, people had to connect a challenging institutional environment with having a diverse student body and engaging that diversity in the classroom. I have consciously made the link between our liberal arts mission and the global and multicultural perspective and made these two interconnected in people’s minds and work.

When I came here, I had us rethink our mission. We have a real strength in math and science. We also had a diverse student body (even if they often were not retained), and potential for a much more diverse campus. So we began to rewrite our mission statement to focus on the success for students of color in math and science. As we did this, everybody began to see this as their work.

One of the most important ways to motivate people and help them see the importance of diversity is to get the board to support the agenda. One of the presidents describes how he obtained board support:

I had the Board of Trustees pass a resolution in support of diversity as an institutional imperative. I've been fortunate that my board has embraced our emphasis on diversity as a good for the campus community and their support helped get more people on board. They talk about diversity as a value in most of their board meetings. This has helped us in advancing our agenda; as people on campus see what a significant priority it is for the board, they cannot ignore this initiative.

Another way that presidents at early-phase colleges described trying to obtain energy and support was by establishing presidential commissions related to diversity. These commissions often became vehicles for creating a strategic plan about diversity:

We recently established a special presidential commission on diversity. This group is analyzing the campus and trying to provide advice on ways to reorganize what we do. We used to have an advisory committee on diversity, but not much was done with their recommendations. This has taken on a much higher profile and people seem to be responding. That's been one of the most powerful ways that I've been able to get people focused on and motivated about creating change.

Building Infrastructure

Presidents at early-phase colleges were unanimous about the importance of using strategic planning and the budget process to create real support for making the vision a reality over time. They noted strategic planning processes as a way to take the stated commitment to diversity and tie it to goals and resource allocation. They also saw strategic planning and budgeting as key motivational strategies. The process of creating a strategic plan was inclusive and helped to instill greater commitment and ownership, a pivotal step in moving into the second phase.

On early-phase campuses, people are often not committed intellectually or morally to the concept of diversity, and resource allocation is a powerful strategy to create forward movement through both incentives/rewards and penalties. Incorporating diversity into the campus's strategic plan and embedding it as an institutional goal ensures financial support and provides a framework for campuswide accountability. One of the presidents talked about how he used the strategic planning/budget process to support and build diversity on campus even when people are resistant, as they often are in the early phase:

The most important advice I would give presidents is to maintain control over the budget and strategic planning process. The president should use the budget to support diversity initiatives, which will likely not receive support early on. No matter how limited your budget is, it can be used to support change. It can provide rewards and incentives. Too many presidents shy away from using the budget and planning processes effectively. Support your commitment and sense of priority with budget allocations.

While many early-phase campuses already have an office of multicultural affairs or affirmative action, presidents noted that Phase 1 campuses need to begin to create greater structural supports (more offices, programs, and positions) for diversity to move into the second phase. One president described how he built infrastructure for the university system:

We have a new position called vice provost for educational equity, who is a senior member of the university administration, sits on the president's cabinet, and has a pretty good-sized staff, and pretty good-sized resources to deploy to encourage diversity. Every college of the university and every campus of the university is asked to have a senior diversity officer. Under the vice provost, we also then have a number of units—like an office of multicultural affairs, advising programs, and unit services—that support that effort. There are staff members in the office who are called diversity planning specialists, and these are people whose careers are to help with programming and the like around campus. So you have to build up structures for support.

With a vision, sense of priority, presidential commissions, board support, strategic planning, and some structures in place, presidents of early institutions have created the appropriate base for the institution to move into the middle phase.

LEADERSHIP AT PHASE 2 INSTITUTIONS

Presidents in the middle phase had to accomplish three main activities: (a) revitalizing the agenda, (b) broadening ownership, and (c) moving from rhetoric to action. All of these activities helped move the diversity agenda toward implementation and made it more than rhetoric. These strategies motivated people to modify their behaviors, providing energy and momentum to get more people involved.

Revitalizing the Agenda

The presidents were not starting a diversity agenda, but they described how they often needed to reinvigorate an existing agenda or move the agenda in new directions.

I did not start the diversity agenda when I got here, [but] I really needed to breathe life into it. There was some rhetoric out there, but not much action

around it and not much energy. So if we were going to move forward, I needed to get people to think about whether this was the direction they wanted to go and how we were going to get there.

Many other presidents mentioned that they felt the diversity agenda needed to be altered because it did not reflect current realities or conditions. Because many people on middle-phase campuses are committed to the concept of diversity, it is important for presidents to ask questions, stimulate people to think, and engage people in campus dialogues rather than provide a personal vision. One president described how she helped people think about the direction for the campus:

I brought groups of faculty and staff together and provided them [with] data about the success of our students of color. It wasn't a pretty picture. Because people have been doing work on diversity here for years, they were really shocked. This gave me the opportunity to ask questions and challenge our assumptions about our success (or lack of success) and get people to think about what activities we really need to be doing on campus. The current problem for which they are meeting and asking questions right now is around why we cannot seem to hire or keep faculty of color.

Several presidents described how, after getting groups of faculty, staff, and students together to brainstorm and question the current progress, they obtained a revitalized commitment and ownership on campus for a new or modified diversity agenda.

Broadening Ownership

Most presidents of Phase 2 campuses already had a mission, strategic plans, and budget processes in place that supported diversity activities. They also usually already had lots of vocal support from the board, influential faculty, and high-level administrators. However, presidents realized they needed to work on broadening ownership of the diversity agenda. They accomplished this task in several ways: hosting dialogues and town meetings (already described), nurturing and empowering staff committed to diversity, hiring people to support the diversity initiative, and creating external networks.

They suggested two main ways to reinvigorate and provide more passion for a diversity agenda in the middle phase: (a) hire new people who have great passion and support for diversity, and (b) provide support for those on campus who already have that passion. In the words of one president:

It can be a major revolution if you identify critical masses of people throughout the institutions who are committed to success for all students and, when provided the right support, are able to make a real difference in the lives of students.

One president described her success in hiring new people as a strategy to broaden ownership and make diversity a campus-wide commitment:

Another part of leadership is making sure the right people are in the room. And so hiring staff who deeply care about this is also perhaps as important or more important than stating a vision because—you can't be everywhere. And we interview for those people. We say, This is who we are as an institution. We explicitly talk about diversity. One of the questions I say is: "What is your experience with a diverse student body and how might you approach this?" And so we really consciously look for that.

Added another president:

I think naming people to important positions, men and women and of all cultures, speaks loudly. But if you hire the right provost, you hire the right dean, you do not have to mess around with hiring of the faculty because the dean is of like mind, and they're going to do that. So I have paid very close attention to key hiring or the right VP for student activities, a Hispanic female, who got it.

Presidents also used external networks and advisory councils to broaden support, particularly among resistant faculty or staff. One president described establishing advisory councils for every school and college and how these external groups were much more effective than the president in providing the motivation for the schools to change: "The engineering school is often much more compelled by the engineering community than by the college president. I let these outside groups apply pressure."

From Rhetoric to Action: Demonstrating Commitment

Presidents realized that, if they did not show substantial progress during this phase, people would become cynical. As a result, measuring progress and showing visible results became important. To measure progress, presidents needed to build an infrastructure to collect data on students of color disaggregated by gender, social class, and other important demographic characteristics. While the data did not always show progress, they helped identify areas for future action. One president described her efforts to build a data infrastructure and how it helped her revise the diversity agenda—again, another important aspect of Phase 2:

It took me a couple of years to totally revamp my planning, research, and evaluation staff, to substantially increase the number of professionals I have in the planning and institutional research areas, and to begin to develop that data warehouse to pump information. When we did that, we were stunned to learn that African American achievement was operating at a significant variance from the achievement of White student peers. That's when I launched the closing-of-the-gap initiative.

Data were also used to describe successes, to motivate people to continue their efforts, and to encourage them to put even more energy into the agenda. A president noted the use of this strategy: "We ran data examining the last five years and our retention rates were way up among all student groups. You could feel the energy change on campus that helped to propel us forward."

One of the most important ways for Phase 2 institutions to illustrate that their diversity agenda was moving into action was to hire faculty from diverse backgrounds. However, this goal can often prove challenging as there are not large numbers of faculty of color and women in certain disciplines and these faculty often want to be at campuses that are in the later phase. Presidents described innovative strategies for hiring faculty from diverse backgrounds. They also noted their personal role in mentoring faculty from diverse backgrounds. In the words of one president:

And five years ago, we established a grow-your-own program, which brings in adjunct faculty that represent quite a bit of diversity. They go through a program where they're assigned certain courses, and then were able to finish their degree—if they decide that they want to pursue it. And we've been able to do that in the sciences, three different positions. This has really helped us to diversify the faculty, and we had not been successful in earlier years and people were getting frustrated.

Presidents also needed to demonstrate that safe havens have been created for students and that the climate for students of diverse backgrounds was improving. A major strategy for ensuring progress in this area was providing adequate resources and leadership for student affairs and student programming. Presidents also described their personal efforts to create resources and leadership for the safe zones:

I helped create centers for a variety of different students: a Hispanic, African American, Asian, gay and lesbian, etc. Before, they were all mixed into one support center; and it just didn't work. They have distinctive needs. I've also helped to create other groups such as the Hispanic Society of Engineering Students which was just named as the outstanding group in the entire country. The Hispanic Business Student Association is very active on the campus and supportive across the campus. Presidents need to ensure that these safe havens exist.

By the end of Phase 2, the campuses have changed the experience for students by making diversity the work of most people on campus. Faculty and staff have momentum because they are beginning to make some progress and feel inspired by a revitalized vision and conversations. More support systems have been built on campus, and diversity is starting to feel like a part of people's day-to-day work.

LEADERSHIP ON PHASE 3 CAMPUSES

The role of presidents in late-phase campuses is to deeply engrain diversity into the campus culture so that it manifests itself in individuals' assumptions. One of the main ways presidents do this is by helping members of campus and the community surrounding the campus to learn about diversity in various forms (religion, culture, class, race), equity, forms of discrimination, and hidden values and assumptions. These presidents are focused on challenging traditional values and ways of doing work and on creating ways that are more supportive of students from diverse backgrounds. They also engage in areas where presidents often do not typically focus efforts, such as helping faculty to rethink the curriculum and pedagogy.

Presidents realized that diversity and equity are systemic problems and recognize the need to maximize external connections for student support as well as creating a pipeline of students of color for their institution. Lastly, Phase 3 presidents focus on assessment and accountability to keep the diversity agenda moving forward. These activities together create a new inclusive campus culture in which ongoing change and modification are norms.

Creating Learning and Challenging Traditional Campus Structures

Presidents on campuses that were late in their diversity initiatives described the importance of continuing to help the campus learn more about diversity. They defined the task of intellectual stimulation as part of their role, created campus-wide conversations, and challenged the faculty and staff to identify problems and interventions. As a result of these challenging conversations, late-phase presidents are able to craft new and innovative programs or new processes that dramatically change the way the campus does work. Two stories illustrate this point:

Faculty often have a set of criteria for hiring that are implicit and that mirror hiring the same type of people, wh[o] usually look like the person who was the graduate advisor. One of the things I try to do is get faculty to write out the criteria that [are] in their head[s] for hiring faculty and make [them] explicit. This separates their biases from the values they are willing to put down on paper. Once I get faculty to write out their assumptions, miraculously, the faculty that they hire are much more diverse. We really don't know when we're operating off of bias. That is one of the lessons that I've learned. These faculty were well-meaning, but hidden biases prevented them from acting on these impulses.

Another president observed:

Our nursing students weren't doing particularly well, and we looked into what was happening. Our nursing program is a very rigorous program, and the families of our students have no clue what the student's going through. So we

changed our orientation so it is for the whole family, not only the students. And we prepare the family, and we say, "Please know that, over the next two years, this is what this person is going to be going through, and so you're going to have to accept and support them. You're going to have to help with the child care. And they're not doing it because they're not good people; they're focusing on school work to survive this rigorous curriculum." So providing an orientation for a family has helped an awful lot. Our nursing pass rate now is 94%, which is way above the average in the state.

Presidents noted that, if they help the campus constituents examine assumptions, they can facilitate deep, fundamental change. Conversations about values and underlying assumptions seldom occur spontaneously, so creating these types of dialogues is an extremely important leadership function.

Digging Deeply into the Core Assumptions of Teaching and Learning

Presidents became involved in curriculum revision and led discussions about the connection between diversity and learning. The core values of campus culture are embedded into the curriculum and approach to teaching and learning. One president described her strategy for becoming more deeply involved in curriculum:

I established a curriculum committee at the presidential level to examine all courses. Faculty needed to demonstrate respect for all cultures in the way course materials [are] presented. The president really has to be involved in the curriculum. It's just too important; it's the core of the institution.

Another president described his involvement with supporting curricular change:

In the past few years, I've spoken up about the infusion of language throughout the curriculum. There have been some faculty that have been talking about that and have been dying to hear the president support that issue. Once people see the president is committed, curricular change happens much more quickly as well.

While several presidents at later-phase institutions mentioned involvement in the curriculum, many also mentioned how presidents can support new pedagogical practices:

I have been encouraging the campus to implement a learner-centered environment which focuses on understanding the student[s] and developing the learning experiences around what is best for them. This has really gotten us engaged in thinking about how you develop a curriculum for very different types of students from varying backgrounds and cultures. I think it's key for the president to be involved in these conversations and help the campus to rethink its primary work—teaching and learning.

While presidents acknowledged that faculty were primarily responsible for curriculum, they described how their support reinforced change.

Systemic and Interdependent Change

In the third phase, presidents became aware that the campus is only one link in the chain of creating inclusive and equitable environments. As a result, they become more involved in K-12, industry, business, and the community. They realize that, as these other institutions change, they facilitate change for their own institution as well. Also other communities have assets that can help the campus create a more inclusive environment. Presidents began to routinely work with external communities, demonstrating particular interest in the pipeline from high schools to college.

Many of the presidents had developed initiatives for increasing access to college for noncollege-going high school students in the surrounding areas. These presidents realized that their commitment to increasing the diversity of the campus had to incorporate efforts to increase the pipeline of diverse students and to transform the communities around the school. One of the presidents described his successful initiatives in local high schools:

Originally we worked with a single high school but now we're in 16. Only 10 percent of their graduating seniors were typically going to college and universities from the schools. Over five to seven years, the post-secondary-going rate increased almost 60 percent, and many are coming here. The retention rate and the continuation rate of those students increased as well. I see us continuing to do this kind of work and building the pipeline. At the phase we're at, this is the work we need to do.

Presidents also used their external networks to support diverse groups on campus that they would not otherwise have the resources or expertise to support. Late-phase institutions depend much more on the external environment for continuing to move their diversity agenda forward. This process becomes increasingly complex as they peel off the layers of diversity and truly understand the challenges students face on campus. One president revealed how truly acknowledging the diversity on her campus has led to important partnerships to support students:

We have students from over 169 different countries on campus. We just cannot provide resources for all these different cultural groups. But we have realized the way that we can work with community-based organizations to help provide support for students and to serve as a resource. I spent a lot of time developing connections to the community to help support our students and our work, and I also need to develop ways to give back to the community and support them.

Presidents also used external connections to help diversify the faculty:

We have gotten involved with several national networks that support graduate students of color. Through these interactions we've been able to recruit faculty of color to the campus and demonstrate that we are a supportive climate. They realize we would not be participating in these national projects if we did not care about diversity.

Presidents who recognize the interdependent nature of the problem of equity help their campuses to understand this issue as well, and they can operate as facilitators of organizational learning.

Assessment and Accountability

Presidential leadership on late-phase campuses involved a decided focus on results, using data, and holding people accountable. These presidents found themselves on campuses where people were already committed to diversity and where a variety of interventions and structures were in place; but these factors did not always mean that the campus was making progress on student outcomes. Several presidents emphasized the same point: that well-meaning and energized faculty and staff are not enough and that data are needed to better support students from diverse backgrounds, to understand their issues, to carefully monitor the process, and to ensure accountability.

Luckily, most of these institutions had advanced systems for collecting data, since such systems were usually developed at the middle phase. In addition, data helped continue the learning process by challenging faculty and staff assumptions about students. One president described how accountability efforts helped him realize when diversity planning and activities were falling short. Although strategic plans set out goals, without careful monitoring semi-annually or annually, it can take years to realize that the campus is not making the expected progress. Presidents described how they monitored progress and tried to ensure forward movement. In the words of one president:

At the end of the year I realize we hadn't done some of the work we said we were going to do. The next week I developed an implementation team with all the individuals that work in the related areas. I gave them specific charges and timelines and reminded them that we have committed to do this work. Campuses that have done good work around diversity and made progress can often end up sitting on their laurels and forward movement stops.

Data can end up isolated in the institutional research office as information that people look at only annually. For ongoing success, leaders understood that data needed to be embedded in the culture of decision-making, which would also ensure ongoing change. Another president described the importance of using data for all decision making:

I encouraged a change in our planning process recently. All planning groups and management meetings are now required to review and present data for decision making. This has also resulted in collecting more data because, when we don't have information, I say, "Well, I guess we cannot make a decision until we have data on the issue." Once people realize you'll not make off-the-cuff decisions [but] demand data, the campus practices change. Just saying you're data driven is not enough. You have to stop making decisions and for people to take it seriously. We used to collect all sorts of data—student satisfaction, market research, climate surveys—but it went into some black hole. Collecting data is not being data driven. In recent years when we have examined the data, we recognize [that] our assumptions are incorrect about what students want or feel. My main advice to presidents who want to help students of color is: "Look at data. You need to challenge faculty and staff about their assumptions related to students, about hiring practices and performance."

All of these presidents also described the importance of disaggregating data into subgroups and looking at diversity in more complex ways. By examining the data more in finely tuned ways, they were also able to continually refine the diversity agenda. As one president realized:

We discovered the African Americans and Africans from Africa had really different issues for success and their experiences were different. But we had not been capturing that before. You have to keep pulling apart the issue and examining the layers of complexity. But it takes time to get there or to even support differences once you discover them.

Mismatching Leadership with Institutional Phases

While the focus of our study was on identifying strategies that worked within certain institutional phases, the presidents provided a few examples of inappropriate leadership strategies that are also instructive. Their experience aids in understanding the problems that can occur when leadership strategies and institutional phases are mismatched.

For example, a president in an early-phase institution began to hire people with a deep commitment to diversity but before the campus had support systems in place:

It was a real disaster. I hired a new set of faculty and staff thinking this would be the most important place to start. However, there was not really the strategic plan or resources in place to support these people. And the vision was not really worked out. They became really frustrated and many of them left within a year or two. I realized I tried to depend too much on them to create the change without developing a foundation. I also realized I needed to put structures in place first.

On another campus, a president of an early-phase campus tried to broaden ownership for a campus vision, but many people did not under-

stand the vision or think that the president was committed. She and other administrators encountered such resistance that they needed to rethink their strategy. She comments:

Sometimes I just forget about providing the stepping stones. I'm really excited about the vision and very committed and I forgot that I needed to help people to understand the vision and to recognize the deep commitment that I had and would have overtime. So I was running around trying to develop broader ownership and got really frustrated when it wasn't happening. And people could tell I was frustrated, and it made them lose confidence in me. At that moment, I realized I needed to rethink what I was doing and understand if I was approaching this right. I realized I was way ahead of the campus, not the place to be.

Another president at a middle-phase campus described his effort to create deep cultural change that met with such resistance that it stalled the initiative for a year:

I thought it was time that we start to examine some of the values held on campus. The campus was moving at such a slow pace; and I thought that if I could get people to fundamentally rethink their values, we could start to change the curriculum and programming and hiring and admissions. So I issued some challenging concept papers and asked some campus groups to make some deep fundamental changes. A few people pulled me aside and said, "I'm really excited about the direction you're taking; but if I make changes you are asking for now, there's going to be a serious backlash and were just not ready yet. Several people I have talked to will mount a resistance if you go forward with this." I really appreciated these insightful people telling me that I needed to get broader ownership first.

These stories help us understand the importance of matching leadership strategy to institutional phase and some of the consequences of mismatches: stalled diversity initiatives, compromised presidential legitimacy, the alienation of certain campus groups, the departure of some faculty, frustration, and the paralysis of campus groups.

THEORETICAL AND PRACTICAL IMPLICATIONS

From a theoretical perspective, the findings reaffirm theories of institutionalization suggesting that leaders need to be attentive to their campus's organizational phase to appropriately and smoothly create change (Curry, 1992; Kanter, 1989; Kezar, 2001; Kramer, 2000). The leadership provided by presidents during Phase 1 closely mirrors the earlier hypothesis put forward by scholars of institutionalization about the importance of creating a vision, helping people to understand the importance of diversity, and building the initial infrastructure and support.

Presidential leadership during Phase 2 focused on broadening ownership and changing behaviors hypothesized in the literature on institutionalization. However, the literature did not describe two distinctive activities for Phase 2 presidents: (a) the importance of revitalizing a diversity agenda, and (b) the significance of demonstrating progress, such as hiring faculty of color. On the whole, however Phase 2 presidents operated in ways like the patterns hypothesized for organizations trying to institutionalize a change.

Phase 3 presidents operated as cultural leaders—helping people examine norms, values, and assumptions and challenging traditional belief systems (Schein, 1985). They found themselves focusing on the curriculum (which represents the core assumptions about teaching and learning) and digging down beyond policies and procedures to the value systems that support the campus. Phase 3 presidents also reflected the institutionalization literature in their focus on assessment and accountability, setting up monitoring systems to ensure the institutionalization of a practice. One area showing a deviation from the institutionalization literature was in how presidents operated as facilitators of organizational learning by challenging stereotypes and assumptions. Cultural leaders help employees to evaluate assumptions, but presidents on these campuses played a much greater hands-on role in challenging and structuring opportunities for people to learn. This leadership role (hands-on involvement in organizational learning) is not emphasized in the general literature on institutionalization. It appears to be particularly important for presidents to take an active role in facilitating organizational learning when an issue like diversity challenges traditional beliefs. But presidents need to know when to use this strategy so that they do not push the campus before it is ready.

The importance of acknowledging interdependent efforts and the systemic problem of inequity (part of Phase 3) also appears to be a unique leadership strategy for diversity initiatives. Presidents acknowledged that their campuses could not be successful alone in the diversity initiative. Institutionalization required outside help and support.

In terms of implications for practice, presidents need to understand the phase in which their campus begins and to align their change strategies with that phase. Moving too far ahead of the institution creates distances between the president and key campus stakeholders which become difficult to bridge. They also noted that providing adequate challenge is important so that campuses do not become complacent. This step is particularly apparent on Phase 3 campuses where the presidents act as instigators of organizational learning, continually pushing people to continue challenging traditional structures and aspects of the culture.

The challenge for presidents is to find the right speed: not pushing so hard that leadership gets ahead of the campus, nor providing so little challenge that the campus gets complacent. By recognizing the campus's current

phase, presidents can move at the right pace and identify the appropriate strategies for smooth and lasting change.

I hope that the findings are not read as a step-by-step plan. While the presidents did believe that certain strategies are important as initial actions while other strategies worked better later, I am not presenting their experiences as a strategic “to-do” list in which presidents simply cross off strategies they have used. Instead, presidents frequently noted that ensuring the success of a diversity initiative is a process of revisiting key strategies often.

Phase 1, 2, and 3 campuses all used strategic planning. However, certain strategies and activities become particularly important within particular phases. I have tried to emphasize what those strategies are, so that presidents can prioritize and focus their efforts on these activities. In the late phase, for example, the president can delegate strategic planning to other staff members because it has become ingrained into the institution as the plan for diversity. For their part, presidents need to become involved with external outreach to support diversity or help change damaging stereotypes that prevent the campus from developing innovative structures.

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