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# A Challenge to Inclusive Excellence: What We Can Learn from a Jesuit Catholic University

Terri Lewis-King

*University of San Francisco*, [tlewisking@gmail.com](mailto:tlewisking@gmail.com)

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University of San Francisco

**A Challenge to Inclusive Excellence:  
What We Can Learn from a Jesuit Catholic University**

A Field Project Presented to The Faculty of the School of Education  
International and Multicultural Education Department

In Partial Fulfillment  
Of the Requirements for the Degree  
Master of Arts in International and Multicultural Education

by

Terri Lewis-King

May 2017

# **A Challenge to Inclusive Excellence: What We Can Learn from a Jesuit Catholic University**

In Partial Fulfillment of the Requirements for the Degree

MASTER OF ARTS

in

INTERNATIONAL AND MULTICULTURAL EDUCATION

by Terri Lewis-King  
May 2017

UNIVERSITY OF SAN FRANCISCO

Under the guidance and approval of the committee, and approval by all the members, this field project has been accepted in partial fulfillment of the requirements for the degree.

Approved:

Instructor/Chairperson

Date

\* \_\_\_\_\_

Committee Member

Date

\*Added only if there is a second reader

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There is a line from a song I used for my high school yearbook quote that still feels right for this moment, “I believe that my life’s gonna see, the love I give returned to me.” Much like every journey in life, this sentiment still rings true for this experience. What is offered in the coming pages is not, I repeat not, the culmination of all that I have learned and experienced in this graduate program wrapped neatly into academic prose. The pages to come are messy, diluted, convoluted, and unfinished; much like my life. Yet, the beauty in the chaos is that I have the most wonderful, awe inspiring, heroic, and downright badass people in my life who have made this journey the best ride in the park.

To my mother, Theresa Marie, who has been my rock, shelter, and guiding light. My brother Akil Jabari who humbles me daily with his God given grace, integrity, and spirit. My aunts, uncles, cousins, nieces and nephews who are the reason I know I come from a strong and dynamic legacy and I have to be more to give more. To my comrades in arms, Windi, Monica, Yesenia, and so many others who have taught me about transformative allyship, Chicana-ness, and what a scholar truly looks like. To the tapestry of professors in the School of Education who have pushed me, encouraged me, and modeled for me that the best is yet to come.

The song continues with the refrain, “you can’t love too much one part of it.” So, as I move it along I will forever be made over by the time and space we occupied together. I love you, I thank you, may God bless and keep you always.

*Dedicated to the memory and spirit of Beverly Antoinette Mayfield and any flower that rose through the concrete of life.*

## CHAPTER I

### INTRODUCTION

#### Statement of the Problem

*“The job sustains my lifestyle. The mission sustains my heart.” – Gilbert Lee*

This quote sums up why many people work in higher education institutions. While the paths that lead us to our current positions is varied, the result is the same. Having worked for almost a decade in postsecondary institutions, large and small, public and private, rural and urban, what I have always been curious about is how the institution invites, encourages, and empowers its staff to sustain their lives and their hearts. Throughout the journey of this field project I wrestle with these questions and how to address them. More importantly the result of this project provides tools for other higher education professionals to use in their assessment and development of organizational support for staff.

The University of San Francisco (USF) is a Jesuit Catholic institution that was founded on the principles of equity and inclusion for all. The Society of Jesus or Jesuits are the largest order of the Roman Catholic Church. Their inception dates back to the 1500s and they were founded on the teachings of Saint Ignatius of Loyola. Their membership today is over 18,000 and their primary focus is intellectual engagement through work in high schools, colleges and universities worldwide.

A number of key Ignatian principles have impacted USF’s institutional mission and values. First is *cura peronalis*, which translates into care for the whole person. It is the acknowledgement that people bring their full and intersecting identities to a space

and that our duty, as Jesuit institutions, is to recognize and value persons while also encouraging growth where possible.

The second is *ad majorem Dei gloriam*, which translates as to God's greater glory. This principle is manifested as an understanding that the work done, by staff and student alike, is not for self alone. Instead one should always see their endeavors and achievements as work towards manifesting the divine in all that is done. The ultimate vision of the best humanity is the motivation to work for others with the destination of a better, more perfect future.

The University of San Francisco began its journey in 1855, as then Saint Ignatius Academy, since then the university has grown to include a community of non-Catholics, women, and people of various race and ethnicities within its student body and staff population. In 2016, USF was recognized for being the second ranked institution for racial/ethnic diversity by *U.S. News & World Report*.

The history and legacy of the University of San Francisco, its location and those drawn to it has been praxis, or mission in action. The University of San Francisco follows national trends along these lines. Throughout its decades, it has become more inclusive, opening its doors (officially) to the poor, non-Catholics, non-Whites, and finally women in 1964. One cannot underestimate the power on the development of the university of being within an urban environment and that city being San Francisco. The immigration waves, the industrial revolution, the mining centers, and the environmental impacts were all major aspects of the legacy of the San Francisco geographic era from the founding of USF to its placement at its location in the bay area today. The

University has benefitted and been challenged by these various cultural, societal, and geographic shifts.

In *Living the Mission* (2013), the Rev. Stephen S. Privett, S.J., former USF president (2000-2014), stated that the goal of a “Jesuit Catholic” university is to amplify and expand the notions of a university. Universities, by and large, are spaces to foster discovery and communication as well as to apply knowledge to scholarship through scholarship, invoke creative expression, both teaching and learning, doing all in service to our profession. Given this framework, being a Jesuit Catholic institution changes how USF functions as an American university.

This paper draws attention to the ethics of the organization (institutional structure) to fulfill its mission by examining what does it mean that the University of San Francisco strives for “inclusive excellence” for its staff members? In the words of current president Rev. Paul J. Fitzgerald, S.J., “we invite you to come join us and become part of a rich and storied community marked by inclusive excellence and dedicated to unity in diversity, with a fine tradition of humanistic formation” (Office of the President, 2017). This community President Fitzgerald talks about is the essence of campus *climate*, defined as the “current attitudes, behaviors, and standards of employees and students that concern the access for, inclusion of, and level of respect for individual and group needs, abilities, and potential” (Rankin & Reason, 2008, p. 264).

Historically postsecondary institutions have been defined by the quality of their students and faculty. The caliber of student, based on grades, standardized test scores, socio-economic status, geographic region, athletic ability, etc. gave the institution a competitive edge versus others, domestically and abroad. Being able to attract and

retain faculty of equal or higher recognition to teach and mold these students became equally important. Given this context it is understandable that organizational benchmarks are created by the demographics of the student and faculty population. The population always left to the margins and footnotes are the staff members who are the sort of higher education middle child.

Due to the lack of focus of empirical research on the staff experience, “in some cases, we review literature on faculty perceptions of the campus climate for diversity as a proxy for staff perceptions” (Mayhew, Grunwald, & Dey, 2006, p. 65). There is a lack of academic interest in pursuing the structures in place that create an exclusion of staff experience in the literature, even at Jesuit institutions such as USF. Yet this phenomenon of overlooking the impact of employee engagement with equity-based missions is also found in non-postsecondary organizations (Kezar& Eckel, 2000).

Since the university as an organization is focused on students, I would argue that student-focused university administrators are the most efficient staff member to question as they should receive the most institutional support as a part of their role in supporting student development. Yet as there are little structural and encompassing support systems in place for these employees, it seems to show that they are ill-equipped or simply ignored. The university has created compulsory programming for students and a separate training branch for faculty; in contrast, there is a lack of inquiry and programming for staff. This gap between the Jesuit principles of USF and the institutional reality means USF is not living up to its institutional ethics, and thereby functioning as an unethical organization.

In Currie's (2011) work published in *Catholic Education* journal he writes that, "institutional autonomy and academic freedom are essential conditions of life and growth, and indeed of survival for Catholic universities as for all universities." It is then interesting to note the increasing integration of identity and mission issues into the curriculum and co-curriculum at the twenty-eight Jesuit Catholic universities in America (Currie, 2011). This founding ideal of institutions as places for growth, for all, historically has come into conflict with the model of collegiate institutions themselves. As universities become more diverse they in turn become the ultimate experiment of forced socio-cultural engagement.

Ethical organizational models hold that to live the mission as outlined by the university that there would be systemic structure in place to support the staff, administrators, and faculty toward the overall mission of creating women and men for society. Yet how does an organization address climate issues whose genesis stems from the mission that is centered on values and beliefs that are aligned in theory but not in practice?

As a student-centered staff member at USF I have experienced limited critical institutional support for this dissonance. Therefore, this project was launched to bring to the fore the observations of other student-focused staff administrators to give voice to their concerns and allow them to offer solutions to the areas that impact their climate experience at USF. Student-focused administrators were extracted as a population of the staff to focus on because of how their positions are directly related to the institutional focus, undergraduate student life and experience. With their proximity to the organization's hierarchical focus the hypothesis is that these employees would receive

the most support from the institution surrounding mission praxis. Lastly, the recommendations from this field project will be the most immediately impactful and useful to this group for their personal and professional development and thereby overall institutional climate.

### Purpose of the Project

The purpose of this paper is to answer the call of Williams, Berger, & McClendon (2005), “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” (p. 31). “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” (Williams et al., 2005, p. 31).

The goal of this project is to identify tools to support Jesuit colleges and universities in identifying and supporting staff in having a positive climate experience. Here I shall engage in critiquing in the cause of this dissonance, develop a tool for reconciling with staff and thereby supporting the overall engagement and development of the campus climate. I intend use the University of San Francisco’s mission as a counterpoint to examine and critique the structures in place to guide and support university administrators as they navigate and understand social change occurring around them daily. Additionally, I aim to determine where the staff are given an opportunity for personal growth around these same issues. “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” (Williams et al., 2005, p. 6).

### Theoretical Framework

This paper uses Jesuit Catholic social thought, organizational behavioral and ethics theories, generative learning principles, and motivational theory to explain the phenomenon that is unique to Jesuit higher education institutions. Calling on best practices in used in equity-centered mission institutions or organizations. This culminates in the use of generative learning to offer a framework of operationalizing the growth potential for staff in Jesuit colleges and universities. This will be elaborated upon in Chapter two.

### Significance of the Project

The significance of this project is multi-faceted as it impacts three audiences: the staff administrators, undergraduate students, and the institution. As the research indicates all perspectives are a requirement for the betterment and fulfillment for the institutional mission. For the institution to put into practice living the mission would be to fulfill its organizational ethics. To support students and staff engagement and retention would be to create a transformative educational environment for all. As the institution has demonstrated an interest in overall campus climate issues in the last decade with the investment in multicultural recruitment efforts, re-modeling of the academic advisement program for retention, the creation of a diversity office, etc. it presents itself as a space where these offices and programs may continue dialogue that acknowledges the experience of least heard voices across the institution.

Moreover, the reality in Catholic higher education is the increase in lay faculty and staff. When Jesuits and those most familiar with traditions and experiences retire, who will serve the formidable task of keeping the Jesuit mission alive in practice? (Currie, 2011).

## CHAPTER II

### REVIEW OF THE LITERATURE

#### Overview

The literature can be manifested in four specific parts. First an understanding of Jesuit Catholic social thought that provides the roots of how the Jesuit mission is influential to the founding and development of USF. Once a foundation of the impacts of Jesuit thought and dynamics in relation to higher education institutions in the U.S. is established, I offer organizational system theory as a way of understanding postsecondary institution structures. Next is setting a framework of motivational theory to begin to unpack the individual and collective experience of staff. After establishing that staff are not motivated by nor experiencing the same as other professionals, then I offer community cultural wealth as a methodology of acknowledging the information within the community. Lastly, organizational change theory and paradigm shifts are explored to begin to offer how institutions may develop. This becomes a critical launch point to critique the state of USF and thereby offer generative learning as the pivot point to counter the incongruence with the espoused mission and the practical organizational methods.

#### Jesuit Catholic Social Thought

The Society of Jesus order was founded under the teachings of Saint Ignatius of Loyola who was a Spanish nobleman before converting to Roman Catholic faith. The Jesuits, as they later came to be known, are noted for this legacy of charity, missionary, and education. This is most evident in their over 100 ministries and more than 200 postsecondary institutions worldwide.

As an order situated in the Catholic Church, USF is called to “be a university in the full modern sense of the word, with a strong commitment to and concern for academic freedom, and that this institutional autonomy and academic freedom are essential conditions of life and growth, and indeed of survival for Catholic universities, as for all universities.” (O’Keefe, 1997)

Yet with “major growth encouraged by readily available federal dollars for construction on campus and for student financial aid. Colleges and universities grew dramatically in size, complexity, and diversity” (Currie, 2011)

During the 32nd General Congregation of the Jesuits in 1975 a new decree was set forth for Jesuit colleges and universities, it stated that “mission of the Society of Jesus today is the service of faith, of which the promotion of justice is an absolute requirement” (n. 48, 2) (Currie, 2011). As lay persons within a Jesuit institution, this assigned the work and responsibility of the commitment to justice to all. This is demonstrated in the core values of Jesuit institutions.

The University of San Francisco’s core values include a belief in and a commitment to advancing (Our Values, 2017):

- the Jesuit Catholic tradition that views faith and reason as complementary resources in the search for truth and authentic human development, and that welcomes persons of all faiths or no religious beliefs as fully contributing partners to the University;
- the freedom and the responsibility to pursue truth and follow evidence to its conclusion;
- learning as a humanizing, social activity rather than a competitive exercise;

- a common good that transcends the interests of particular individuals or groups; and reasoned discourse rather than coercion as the norm for decision making;
- diversity of perspectives, experiences and traditions as essential components of a quality education in our global context;
- excellence as the standard for teaching, scholarship, creative expression and service to the University community;
- social responsibility in fulfilling the University's mission to create, communicate and apply knowledge to a world shared by all people and held in trust for future generations;
- the moral dimension of every significant human choice: taking seriously how and who we choose to be in the world;
- the full, integral development of each person and all persons, with the belief that no individual or group may rightfully prosper at the expense of others;
- a culture of service that respects and promotes the dignity of every person.

These core values create a framework for the basis of measuring what actions and policies are deemed as justice-oriented and ethical.

### Organizational Systems Theory

Systems theory shifts “the focus of organizational research from exclusive attention to internal conditions to a concern with the relationships between the organization and its environment” (Simsek & Seashore, 1994). Challenging this viewpoint allows for the acknowledgement of the adaptative nature of organizations as they strive toward equilibrium within their environmental conditions (Simsek & Seashore, 1994). In Simsek and Seashore's (1994) research they acknowledged other

theorists such as Weick (1976) whose argument that educational organizations have a unique quality of being “loosely coupled,” as to impact their ability to make large-scale change less expedient or to affect the organization holistically (Simsek & Seashore, 1994).

For this reason, perhaps many more, we hold the mental mode that an organization is characterized as static; being stable with relatively predictable patterns of action. The aspect about organizations that is hardest to confront is that they are characterized by change, ambiguity and contradiction (Quinn, 2007). This contradictory understanding of the nature of organizations is further exacerbated by the internal biases we carry based on our access point to the organization. The experience we have within organizations further develops our biases towards the functions and culture within the organization (Quinn, 2007).

### Motivational Theory

Motivational theory tends to assume that all employees are alike, all situations are alike, and there is only one best solution (Lawler, 1970). However, the more valuable tool is to check the system for equity, not equality where all are rewarded equally. A system of equality will produce low motivation. Within each department or across a university, the work load and even points in time of workload are unequal. A system without equity will produce distrust and disengagement from the mission, which may ultimately lead to attrition and turnover (Nadler & Lawler, 2007). Organizations need to be flexible because different employees have different needs and therefore have different valences. Effective motivation will reflect knowledge of this and the ability to navigate those differing areas (Nadler & Lawler, 2007).

Due to rising costs of infrastructure maintenance, real estate, cost of living, and declining federal and state budgets for higher education, many private institutions have turned towards a model of raising tuition costs and shrinking departmental budgets. The impact of these solutions can be exhibited in the downsizing staff positions and outsourcing to minimize their labor costs so their way towards net tuition revenue or profit. Yet this myriad of push and pulls serves to undermine the organizational culture.

Correlational evidence of this can be seen in the survival rates of initial public offerings companies (Pfeffer & Veiga, 2007). Pfeffer and Veiga (2007) cite empirical evidence cited that links profit margins and the value the company places on its human resources/capital. Their conclusion was that people work harder because of increased involvement and commitment, people work smarter because they are encouraged to build relational skills and cultural competence, it would therefore stand to reason that people will work more mission-centered if more organizational value is placed on demonstrating those values in practice (Pfeffer & Veiga, 2007). Challenging the dichotomy of profit versus people, putting people first and reinvesting in your employee/staff are what is best for the company (Pfeffer & Veiga, 2007).

Systems think is the phenomenon of being cognizant of underlying trends and forces of change (Senge, 2007). This skill set should be developed to remain vigilant and critical of the profit vs. people dichotomy. The development of the set of skills can occur through being aware of the interrelatedness of all aspects of the organization. This will unearth the processes at work instead of focusing solely on the snapshots. Also, moving beyond blame for issues within the system. Therefore, it cannot just be one employee's fault, but the system itself that is failing. Importantly, avoiding intervening for

symptomatic interventions. At times of difficulty within an organizational area it is easy to charge in and want to offer a quick fix. However, the fix will be temporary and targeted because it is only addressing the symptoms of the problem and not the systemic precursors. It is advisable instead to continue to encourage the staff to uncover the problem and create a solution without interference (Senge, 2007).

### Community Cultural Wealth

The next logical question to ask then is, how are we as an institution of higher learning cultivating the natural impulse to learn? Where are we creating space in the margin that allows for continual exploration and potential sources of human capital growth? Here we turn to the theory of community cultural wealth (Yosso, 2005). This approach centers the experiences of staff as experts in their lived experience within the institution. Coming from the roots of critical race theory, community cultural wealth was proposed as a methodology to further the traditional interpretations of cultural capital; the idea that inherent in all cultures are knowledge, skills, and abilities that produced within their cultural framework. Due to ones marginalized status within the dominant framework their facets are not recognized for the value they have.

Community cultural wealth is an asset based ideological shift that changes the dominant narrative from a deficit model, “why can’t you do more” to “how can we support you to do more”. This allows the historically marginalized staff members within higher education institutions to have a voice that is acknowledged as unique from faculty and students and valuable to the organizational structure.

Legitimizing these gaps brings forth the whole person in the staff member and thereby is social justice mission in practice. *Cura personalis* is put into practice when the

capacities of lived experience, social linguistic, and resiliency are brought into the professional development of staff members (Yosso, 2005). I see this as the contrast between the mental models. Mental models are mental assumptions that are formed in our mind's eye of how the world works which influences how we perceive problems and opportunities and identify where and when to make choices (Senge, 2007). These assumptions are damaging to the organization because if they go unexpressed than there is little room to challenge and address their validity.

We hold the mental model of the institutional mission (eg what we say we value) and the theory in practice (eg what our actions are). We can use community cultural wealth as a framework of bringing voices from the margins to the center to create tools that assists in mission alignment. Jesuit higher education institutions are imbued with creative tension at their core. This tension stems from holding both the “vision” or “mission” of Catholic social thought and the “contemporary reality” (Senge, 2007). The gap between the “mission” and “reality” is where this tension lies. Two clear cut ways to resolve the tension are to: raise reality to the mission or to lower the mission to reality; regardless a shift must be made.

#### Organizational Change as Paradigm Shifts

From the perspective of staff in higher education institutions, there are organizational behaviors that must be exhibited to validate their worth. Here I use Peterson and Spencer's (1991) definition of organizational culture as “the deeply embedded patterns of organizational behavior and the shared values, assumptions, beliefs, or ideologies that members have about their organization or its work” (p. 142). By nature, organizations are “organized anarchies” in which change is unpredictable

because of the random involvement of differing actors who have a different politicized agendas and interests (Simsek & Seashore, 1994). However, successful organizations have characteristics of anticipatory adaptation rather than radical change (Simsek & Seashore, 1994).

The terms “paradigm” and “paradigm shift” are used to describe the view of reality shared by members of the organization (Simsek & Seashore, 1994). Therefore “radical change” within the organizational context is defined as the discontinuous shift in this socially constructed reality (Simsek & Seashore, 1994). The organizational paradigm has a set of assumptions, largely implicit, about what sorts of things make up the environment; such as, how to act, how to engage with members within the organization, and how to relate these “rules” to one another and when (Simsek & Seashore, 1994). The actions of the organization are therefore guided by these set of assumptions which are grounded in the distinct settings, actors, and historical successes and failures (Simsek & Seashore, 1994).

This paradigm is composed of three interrelated components: (1) a way of looking at the world which creates an image of the subject matter about the world’s phenomena; (2) a way of doing things, methodology; (3) an interaction among human actors to support both the belief system and the normalized behavior (Simsek & Seashore, 1994). To address these congruent phenomena within an organization, Simsek and Seashore (1994) proposed the dynamic organizational change model. The dynamic organizational change model is comprised of five separate and consecutive phases: normalcy, confrontation of anomalies, crisis, selection (revolution), and a new normalcy period.

Normalcy is a period characterized as a distinct paradigm that has established

dominance in guiding the organizational activities and imposing organizational knowledge as reference to those structures and methods. Confronting of anomalies or within the organization for an extended period is a matter of perception. These anomalies may be new to the dominant structures but were present in other areas. Regardless, their presence as differing from the dominant causes a crisis. Crisis is marked as continued anomaly or hindrance in the primary mission over a long period of time. Selection is determining in a time of crisis which methods presented by structures of power and influence work within the framework. Renewed normalcy emerges as a new paradigm becomes dominant. This is also characterized by a wave of enthusiasm within organization for identifying and “solving” a problem. This coincides with the establishment of new power dynamics and the appearance of new actors on stage (Simsek & Seashore, 1994).

### Generative Learning Theory

Generative learning is characterized by creating through an emphasis on continuous experimentation and feedback; in this case, within the organization or institution. It is a method that seeks to understand and meet the “latent need” of the employee -- matching what they value to what they may have never experienced before; their visionary opposition (Senge, 2007). “Generative learning requires seeing the systems that control events. When we fail to grasp the systemic source of problems, we are left to “push on” symptoms rather than eliminate underlying causes” (Senge, 2007, p. 102). When we divorce ourselves from the Western traditional view of leaders as mostly men who charge in with charisma and authority to heroically ameliorate a short-term problem and instead think of leaders as change agents then we can alter our perspectives

and expectations. Leaders can truly move to being defined as designers, teachers, and stewards (Senge, 2007). “The ability to build shared vision, to bring to the surface and challenge prevailing mental models, and to foster more systemic patterns of thinking” (Senge, 2007, pp 102) are how leaders in learning organizations build cultures where people are continually expanding their capabilities to share their future.

This view of leaders as teachers help create a view of reality that sees beyond the superficial immediate concern to the underlying cause of the problems—thereby uncovering possibilities where previously there were only barriers. Jesuit institutions, by nature, practice leadership as stewards. They are stewards for the people they lead and stewards towards the larger mission of the institution. People within learning organizations are perhaps more vulnerable because of their commitment and sense of shared ownership with the mission carries added economic, emotional, and spiritual risk (Senge, 2007).

Jesuit postsecondary institutions in America are seeming to fall prey to similar attributes that define public and private institutions nationwide, their leadership in the last decade has become increasingly reactive. Jesuit leaders understand creating vision and handling crisis, but not much in between that spectrum. The result is that the institution seems to vacillate from crisis to crisis and using the “mission” and the communications and marketing department to explain away the event.

### Summary

These theories and frameworks bring us to the crux of this project’s thesis; to engage and retain the staff at an equity-mission based organization, you must move from a shift your mental models of what the organization should be and utilize the voices of

those most marginalized to make lasting and impactful change.

“An accurate picture of the current reality is just as important as a compelling picture of a desired future” (Senge, 2007, p. 103). Therefore, what tools can be used to address this tension at the microcosm of staff member experience and the macrocosm level of the institution-wide community?

Lastly, there must be a note of caution that occurs with any institutional change. The distinction for lasting change is the motivation. When addressed as a problem-solving endeavor, the extrinsic motivation to change becomes less pressing as problem appears to go away. Yet if approached from a lens of creative tension, then the motivation is intrinsic; developing an organic generation of knowledge.

## CHAPTER III

### THE PROJECT AND ITS DEVELOPMENT

#### Description of the Project

This project began with the goal to create tools that would help staff feel more mission aligned. A qualitative methodological approach was used to assess the experience of USF student-focused staff members. This process is most beneficial, in the first, because it provides a staff narrative that is rarely seen in the literature. Secondly, these staff are also responsible for creating environments which engage and strengthen students' understanding of the mission. Further, unlike faculty, their position may not be directly linked to their scholarship so the instruction from the university is paramount in creating a community culture that is centered on the mission.

Participants were selected based on specific criteria: 1) They needed to have worked at the university for at least one full academic year, and 2) Their job description had to require direct and persistent contact with undergraduate students. Interviewees were chosen as student-focused staff at USF to analyze their introduction to the mission as a part of the organizational culture and expectations, how they were supported in this, and how they have personally and professionally navigated the issues that arise for themselves and students. I interviewed five staff from across academic and departments areas, hierarchy, race/ethnicity, gender, sexual orientation, and tenure. From the interviews, I identified experiences that correlate with the research on organizational behavior. These interviews were conducted with an understanding of confidence to record each person (Appendix III).

Each participant was asked a series of questions that served as an overall

guideline; they were not intended to stifle conversation (detailed below). Throughout the interview notes were taken to capture the salient pieces of the conversation and highlight convergent and divergent themes related to the project topic. Next, each interview recording was reviewed to accurately synthesize statements and suggestions made by each participant. These points were compared to the knowledge attained from the literature review to develop a framework for suggestions for the field project.

### Interview Questions

The following interview questions were asked throughout the study:

1. Are you equipped to acknowledge, access, and within the confines of your position within the institution, to respond to students as they navigate understanding social justice and societal inequities?
2. Within the context of the Mission, what is the training and/or support that you received from the university and your department to prepare you to work with students?
3. To what degree did you find that training and/or support helpful?
4. What (if any) areas did you have to supplement from training and/or support you experienced as not complete? (doesn't quite make sense as written)
5. Throughout your training and/or support, were there considerations of all the populations of students you work with? (can you be more specific about what you are referring to?)
6. If you could engage in a training experience that would support the work you do with students surrounding the Mission, what would it be?

## Findings

Overall the interviewees felt a strong connection to the Jesuit mission of the institution; however, they all noted that they were not introduced to the mission in a holistic method. Their understanding of the mission came from experience, coursework, engagement with colleagues, and/or external exploration of the topic. The themes that emerged from the various interviews centered around: a critical and multi-lensed introduction to the mission, set expectations on how the mission should impact their work, acknowledgement and accommodation of those barriers, creation of spaces for self-reflection and creativity.

An introduction of the mission was discussed in all the interviews as needing to be addressed at multiple points during a person's tenure. They suggested at the point of hire, during human resources orientation training, and continued with university-wide workshops and opportunities to discuss across departments how the mission is practiced in professional spaces. For many they felt that the mission unveiled itself in the act of working with students; not necessarily in the rest of their professional role.

Another concern expressed involved the expectations from university leadership versus the department specific expectations on how reflection and discernment practices are carried out. For example, if a supervisor acknowledges the mission at work in their profession and encourages their staff to make a habit of reflection then the staff member felt it to be a part of their work performance. However, if the supervisor was unaware and/or did not value reflection and discernment, in the context of the workday, then the staff member felt ill-equipped to seek out, participate, and/or practice reflection and discernment in their work. The power dynamic between the supervisor and the staff

member seems to indicate that a top-down strategy would be necessary for staff to include reflection and discernment as a part of their work.

Participants noted that barriers to engaging in reflection and discernment as praxis are that in the hierarchy of a postsecondary institution, staff are regulated to paperwork not engagement. Many expressed feelings of isolation, mistreatment, classism, racism, sexism, ageism, etc. More particularly expressed was that the hierarchy between faculty and staff can breed cautious perceptions from faculty or general dismissal. This consistent abuse caused frustration and resentment as staff can be "present with, care for, and mentor and help a student navigate our university systems successfully" but not provided with the adequate levels of support organizationally. For some participants they found outside training, in professional networks of other Jesuit institutions, were the spaces in which they received the most development and guidance regarding Jesuit-identity formation and alignment.

Every person also indicated that the crux of this Jesuit-identity formation and alignment is space for self-discovery. The incongruence they all highlighted was that there is no organizational framework in place to encourage time to engage in the mission and therefore, although stated as a core value, in reality, appears as less important. Regardless, each person was fully committed to the Jesuit ideals, as they understood them, and had a desire to engage, learn, and inform. They were each attracted to USF for the dynamic and interactive learning community. The request they had as servants to the institution was that it be willing to admit our issues (as an institution), humble ourselves (as leaders), and be willing to re-work what is necessary to move forward (as co-creators).

Proposed ideas on how the institution can help staff be more mission aligned, would be workshops on Jesuit values, “pop-up” conversations that were inter-departmental to engage with other staff around Jesuit values. Some interviewees even pointed to other organizations and their creation of learning laboratories as practice arenas for leadership skills that allows for egalitarian knowledge dissemination, learning of people and system dynamics, experience long-term consequences of systemic decisions, and develop new skills (Senge, 2007). Others wanted to see TedTalks as a feature. Still others wanted to see the Dead Hours that already have institutionally be enacted as times in which organic conversations could develop amongst the campus community. Lastly, a suggestion offered that leads directly into this project addresses how to create clearer ways in which decision making procedures are vetted through the mission to maintain mission alignment.

#### Development of the Project

Bringing in the staff member narratives and suggestions and combining the literature offered several interesting ideas to move forward with the project. Put plainly by one participant, “we lose out when we don't mine the ability of staff.” Ultimately the goal was to make this tool accessible to staff members directly. Close attention was paid to not only presenting a set of principles that would help identify for the individual, department, and institution whether mission alignment was occurring, but also to make these assessment tools quantitative and qualitative in nature. Primarily to offer different modalities to accommodate learning preferences. Additionally, to provide clear benchmarks with quantitative data and allow qualitative data to organically unearth the perceived and lived experiences of staff members within the institution.

## The Project

While this model emphasizes collaboration, empowerment, and shared responsibility, one must recognize that any collaborative group effort to effect change needs to be initiated and sustained. Therefore, a successful model must have and understanding of the organizational culture to align structurally and become engrained; thereby creating cultural change. Additionally, a collaborative model is necessary for the sustainability of the project past the inception of the idea. “Comprehensive change might best be examined through a framework in which values and beliefs are a focus” (Kezar & Eckel, 2000, p. 437).

Researching and defining the task was critical for project development. Identifying the gaps in knowledge and seeking out the resources, internal or external, helped to illuminate the situation. Further using that information assisted in rearticulating the task to consider this new information.

As the model (See Appendix I) is used, a focus on the division of labor is important. This is both for the equity of the work load and to note who is in the room and who is left out. For the individual or team conducting the review it is important to note what are the special skills/knowledge set that is needed to undertake the project or address the problem? Which departments possess that knowledge/skill? Each division assumes some defined role/responsibility in the project.

The scorecard (See Appendix II) can be used to identify bureaucratic structures, departmental policies, and overarching organizational processes. It can also be used to communicate progress to all stakeholders of the institution (Williams et al., 2005). The success of various strategies are determined by examining the (a) baseline, (b) target, and

(c) equity goal. The baseline involves information on the institution before the intervention strategies are launched, the target involves what the institution is trying to achieve, and equity represents the ratio of the baseline to the target. For example, if Latino/a staff comprise 5 percent of the population in the staff population (baseline) and 10 percent of the state population (target), then the level of equity that has been achieved is 0.50, with 1.0 representing true equity of outcomes.

More than any other area, the access and equity indicator “makes sense” to campus leaders because it is concrete and quantitative. The remaining three areas are often more qualitative in nature and therefore more difficult to capture and assess. Assessment of all four areas, however, is necessary to form a more complete picture of an institution’s current level of progress toward making excellence inclusive. While the IE scorecard provides an assessment framework, its true power lies in the fact that it can also “drive the organizational change process, connecting efforts to core goals for educational excellence, through leadership and accountability, vision and buy-in, capacity building, and leveraging resources” (Williams et al., 2005, p. 27).

#### Four Areas of Change Model

*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. One objective in this example involves equity of historically underrepresented populations in higher education. Specific strategies, such as identifying community members and helping them develop and achieve skills toward employment, creating an academic success and mentorship programs to ensure student

success in college and an affinity towards institutional career fields, and leadership pipeline programs that provide access points to the university structure from students across the Jesuit collegiate sisterhood of schools.

*Institutional climate.* The campus climate refers to how students, faculty, and staff perceive and experience an institution's environment. These perceptions can range from very positive to very negative. While it is relatively easy to track some indicators of campus climate, such as the number of harassment incidents reported on campus, it is much more difficult to develop sophisticated systems for monitoring broad perceptions and experiences of climate.

Even when institutions monitor campus climate, the value of the data can often be undermined by various factors. Between-group differences are sometimes not captured by certain measurement tools. Other times, demographic data may be collected but not used to disaggregate findings in ways that illustrate how, for example, students of color are doing in relation to one another and to white students. Research processes used to assess campus climate may also be problematic. Many strategies do not qualitatively assess campus climate dynamics at all, fail to balance quantitative data with qualitative data, or fail to attain a robust sample size of students of color, thereby preventing both inter- and intra-group analyses of the data. Even more problematic is the tremendous lag that can occur when troubling issues are identified and committees and units are not poised to translate findings into strategies that will address these issues.

*Diversity in the formal and informal workplace.* A critically important area of inclusive excellence is the presence of diversity in both the formal and informal workplace of higher education institutions. A significant body of literature suggests that a

serious engagement of diversity in the curriculum increases positive student attitudes toward and awareness of diversity, satisfaction with college, and commitment and involvement in education in general (Smith, 1997). Key indicators include the presence of and participation in general education diversity requirements and the number of courses and majors that explore issues of power, social justice, equity, multiculturalism, and diversity. One study by AAC&U revealed that 54 percent of the 543 campuses responding to their survey had a general education diversity requirement (Humphreys, 2000). Other work by AAC&U also suggests that campuses have made significant progress in incorporating diversity into the curriculum, especially in the general education curriculum (Humphreys, 1997). However, a systematic understanding of how these requirements are structured, how they are taught, where they are situated in a student's undergraduate experience, and whether the requirements are based on content knowledge about diversity issues or developing skills to enhance one's ability to interact in diverse groups is much less developed. Learning from the deficits of student development will help staff engagement and development work be more holistic and authentic.

*Learning and development.* Diversity, conflict resolution, and other staff and faculty professional development topics are critical to building an institution that embraces inclusive excellence. 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.

Tracking staff learning and development is especially important because it provides critical benchmarks to assess how institutions are doing in terms of preparing all staff to lead in a global, multicultural world.

## CHAPTER IV

### CONCLUSIONS AND RECOMMENDATIONS

#### Conclusions

The main purpose of this project was to identify tools to support Jesuit colleges and universities in identifying and supporting staff in having a positive climate experience. The work towards mission alignment is critical to maintaining an ethical organization and being authentic to the foundational Jesuit Catholic principles. In this chapter, there will be a review how the project accomplishes this task and reflections on the next steps forward.

An observer of higher education could tell you that the institutions are enduring because they do not change. What we witness as changes are not institutional change they are just a patchwork process to alleviate the crisis that is presenting (Simsek & Seashore, 1994). The project presented pushes against this tendency by offering quantitative and qualitative methods for examining paradigms and paradigm shifts within the institution.

The incongruence of organizational values and the circumstance of lived values of the institution is the impetus for calling into action this work. This provides an opportunity for value clarification and value development within the individual staff (consciousness of self) and on the identification and development of shared values (common purpose) among with the organization/institution (Astin & Astin, 1996).

#### Recommendations

The *Principles Guide to Good Practice for Inclusive Excellence* can be implemented immediately in the field. The initiators would most often be student-centered staff due to their proximity to students and as chief contributors to the work of

mission alignment. Also, human resource offices as the organization-wide staff engagement and training office that may set institutional goals for an inclusive environment. Lastly, diversity offices may be organizational champions to advocate on behalf of the staff climate experience.

The guide can be used in part or in whole. The process by which to engage this work can come in the form of the individual staff member working with their supervisor. There may also be an invitation by a department to use as an internal audit to its staff, faculty, and students. If adopted by the entire institution, there may be a working group formed to assess what order the key principles that should be addressed and the method in which to include the entire university.

#### Further Considerations

Within this organizational change model, it is important to note the degree to which power dynamics impact experience. By simply being a more senior colleague (in age and in time within the organization) there will be a perceived level of power. I suggest acknowledging this discrepancy up front and letting staff know that the intent is for all parties involved to grow from this experience.

Additionally, campus climate and institutional culture will not change within a one year time; therefore, to allocate that expectation is a ground for extremely unlikely success (Pfeffer & Viega, 2007). Institutions tend to expect that systemic problems will have short-term (3-5 years) solutions. This false expectation must be addressed and guarded against throughout the change process.

Similarly, to overemphasizing the value of stock in a company, institutions should guard against overemphasizing their rankings as purported by third-party sources. These

markings, while great for advertisement, do not significantly move the tide organization-wide (Pfeffer & Viega, 2007). For example, while accolades like a *U.S. News & World Report* rankings provides one story of the numbers. Attaching value to these external measurements may cloud the urgency to initiate and enact change.

The third consideration is providing access to data on staff enrollment and retention compared to hiring and retention data regarding staff; specifically, in student service and resource areas. Moreover, if there is a disproportionate number of staff identities compared to the student identities they serve. Identifying the gaps in knowledge and seeking out the resources, internal or external, that will help the illuminate the situation. Such policies would show transparency of the organization and provide for community-based solutions to under or over-representation.

This model is skewed towards staff who may already have a mental model of the Jesuit mission. Different data and perspectives would emerge for other staff members within the institution who are not aligned with the mission and/or do not have the means in which to do it. These may be the most underrepresented peoples within the staff member category. Considerations for how to identify and engage those staff members would significantly impact this work.

To revisit, conducting the project through an inclusive lens that holds space for all voices and identities is mandatory. Thinking outside the traditional silo paradigm will also generate creative ideas on how to move the institution forward.

#### Further Development

In addition to student development models that were pulled from in this project, there are other Jesuit affiliated models that may be helpful in furthering this approach.

The programs created by Jesuit institutions, typically ministry or president's offices, to orient board of trustee members to the mission to help them discharge their duties could be an area to investigate further (Currie, 2011).

Organizational theory was used in this paper to highlight the nature of Jesuit colleges and universities as institutions that share the similar (if not the same) characteristics as other equity-driven institutions and organizations. Due to these commonalities, there may be further development and application of this tool to other organizations with similar value-driven or equity-based organizations and businesses.

If adapted to a non-educational organization there must be a focus on the “comprehensive change; it is defined as change that is pervasive, affecting numerous offices and units across the institution; deep, touching upon values, beliefs and structures, is intentional, and occurs over time” (Kezar & Eckel, 2000, p. 440). Staff development, senior leadership and accountability, vision and buy-in, capacity-building, and leveraging resources are all qualities that must be congruently held to maintain the standard of an organization's commitment to inclusive excellence (Williams et al., 2005). Simsek and Seashore (1994) remind us that while if carried out these all may be excellent indicators that a change has taken place, they are difficult to carry out and do not produce much change in behavior (exemplars and models) until there has been a genuine shift in the underlying assumptions and values (myths and metaphors).

I argue that in all these types of values-driven organizations staff members/employees are pushing the business model to be a complex quadruple bottom-line. This expectation would require organizations to re-think the models employed to manage and engage their employees. The traditional triple bottom-line business model

attributes assessing the performance of a business as: economic benefit, environmental benefit and social benefit. This fourth attribute, “spiritual benefit” is contended to be necessary in the world of the future, defining organizational success (Datar, 2014). While the business world works to describe and operationalize how to create workings spaces in which a spiritual dimension transcends financial and social satisfaction and amenity, this spirituality is already inherent in the Jesuit Catholic institutional mission.

In doing this work we must keep at the forefront that we are not trying to recover something that has been lost or misplaced in our search for loftier pursuits. “Rather, we are trying to create something that has never existed: a Jesuit, Catholic identity combining Ignatian spirituality, the Catholic intellectual tradition, and Catholic Social Teaching, all forged with diverse colleagues, in a pluralistic, postmodern university setting, while facing all the challenges of a globalizing world” (Currie, 2011, p. 355). Therefore, we must stay vigilant in our engagement in the persistent “quest to realize the promise of being Jesuit and Catholic today and into the future—no easy task, but a magnanimous venture” (Currie, 2011, p. 356).

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APPENDIX I

Principles for Good Practice for  
Inclusive Excellence: Tools for Praxis

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Terri Lewis-King

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## Introduction

### **Background**

To interviews student-focused staff at USF to analyze their introduction to the mission as a part of the organizational culture and expectations, how they were supported in this, and how they have personally and professionally navigated the issues that arise for themselves and students.

I selected staff from across academic and departments areas, hierarchy, race/ethnicity, gender, sexual orientation, and tenure to use as perspectives of the Jesuit mission and how that impacts both the student and their personal development.

Universities, by and large, are spaces to foster discovery and communication as well as to apply knowledge to scholarship through scholarship, invoke creative expression, both teaching and learning, doing all in service to our profession. Given this framework, being a Jesuit Catholic institution that is committed to social justice changes the expectations and accountability for the experience of its staff.

“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” (William, 31). “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” (William, 31).

Additionally, I aim to determine where the staff are given an opportunity for personal growth around these same issues. “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” (William, 6).

a shared perception of need from the organization and the individual employees/staff targeted in the project. The aim will always be to create an inclusive environment.

Researching and defining the task is critical for project development. Identifying the gaps in knowledge and seeking out the resources, internal or external, that will help the illuminate the situation. Further using that information to rearticulate the task in light of this new information.

### **Process**

The success of various principles is determined by examining the (a) baseline, (b) target, and (c) equity goal. The baseline involves information on the institution before the intervention strategies are launched, the target involves what the institution is trying to achieve, and equity represents the ratio of the baseline to the target.

Baseline:Target = Equity

Baseline – current rate, number

Target – proportional representation determined by geo-local factors

Equity – ratio of baseline number to target number

“A scorecard can be used to align a change vision with bureaucratic structures, day-to-day operations, and overarching organizational processes. It can also be used to communicate progress to all stakeholders of the institution” (Williams, 20).

***Acknowledgements***

I want to thank the various staff at the various Jesuit higher education institutions. Most particularly the staff at the University of San Francisco. Additionally, I want to thank the work of the Association of Catholic Colleges and Universities for crafting a template for this guide in their 2010 Principles of Good Practice for Student Affairs Professionals. Moreover, for the inspiration from the 2005 work sponsored by the Association American Colleges and Universities series Making Excellence Inclusive.

## Considerations

These principles are offered as key aspects to any inclusively excellent and equitable institutional environment. While each scorecard should be used to indicate where to begin addressing internal issues, the principles can also be categorized as macro, bridging, and micro concerns. The principles are presented in that order.

Macro concerns are those that are intuitional or departmental in nature. Addressing them would create a better overall experience as well as at an individual level.

Principle One: welcome all staff to inclusive and diverse community, will address the overall campus climate. How the staff, whom engage with every subset of the institution perceive the campus experience, has direct impact on every aspect of campus.

The policies and procedures that impact the campus environment has a broad reaching consequence. Principle Two outlines: ground policies, practices, and decisions in the teachings and living tradition of Saint Ignatius and the Society of Jesus, highlights that policies. Lastly, Principle Three: create opportunities for staff to experience, reflect upon, and act from a commitment to justice, mercy and compassion and considering Jesuit Catholic social teaching highlights the institutional mission and purpose that permeates every aspect of student and employee life and experience.

A bridging concern between the greater institutional issue to the individual issue is Principle Four: invite and accompany staff into the habit of reflection. There must be an organizational structure to create a campus-wide invitation, which requires investment by various departments and encouragement from the leadership. However, to complete the principle there must also be a habit of reflection, from the institutional and personal level.

At their core, micro concerns have the greatest impact on the individual staff member and can only be realized with each person's dedication to the spirit of the principle. To challenge staff to high standards of personal behavior and responsibility through the formation of character and virtue requires the organizational framework in place to meet that challenge, but is a good example of how staff must fulfill their part. Principles Six and Seven focus on seeking dialogue among faith backgrounds and assisting staff in discerning and decision-making. Again, the suggested starting point is from your scorecard results; however this is another way of understanding the principles presented.

## Inclusive Excellence Model

A multidimensional management and measurement tool that can simultaneously drive and assess change related to four areas: (1) access and equity, (2) campus climate, (3) diversity in the formal and informal curriculum, and (4) learning and development. More than any other area, the access and equity indicator “makes sense” to campus leaders because it is concrete and quantitative. The remaining three areas are often more qualitative in nature and therefore more difficult to capture and assess. Assessment of all four areas, however, is necessary to form a more complete picture of an institution’s current level of progress toward making excellence inclusive.

The Four areas are defined as:

- Access and Equity - the compositional number and success levels of historically underrepresented students, faculty, and staff in higher education. From this perspective, inclusive excellence involves the representation and equitable achievement of these groups on campus.
- Diversity in the Formal and Informal - diversity content in the courses, programs, and experiences across the various academic programs and in the social dimensions of the campus environment
- Staff Learning and Development - the acquisition of content knowledge about diverse groups and cultures and the development of cognitive complexity
- Institutional Climate - the development of a psychological and behavioral climate supportive of all students

In order to embrace inclusive excellence on our equity mission centered institutions and organizations, these are complicating areas that should be looked at as was to determine equity across the university/department.

## PRINCIPLE ONE

Welcome all staff into a diverse and inclusive campus community

*Objective: The University of San Francisco strives to promote safe, affirming, and inclusive communities for all campus members to learn together, enriched by the presence of people of diverse abilities, faith backgrounds and identities. We welcome, expect, and encourage the continued pursuit of knowledge, skills, and abilities to build a more inclusive community which celebrates diversity and works toward justice.*

### Assessing This Principle

1. What does this principle **mean** for the institution?
  - a. How does it align with access and equity goals?
2. How do you **apply** this principle through programs, policies, & practices?
  - a. How are positions advertised and candidates selected for positions?
  - b. How are staff welcomed into the campus community?
  - c. How do these welcoming activities both celebrate the institution's Jesuit identity and embrace diversity in both faith and culture?
  - d. To what extent is the human resources staff and department staff prepared to welcome a diverse community of faith and culture?
  - e. In what ways do the actions of human resources and department staff reflect *cura personalis*?
  - f. How is this principle implemented through intentional activities that reflect respect, justice, collaboration, and dialogue?
3. What **evidence** do you have to judge the effectiveness of your efforts?
  - a. To what extent does the evidence demonstrate diversity in formal and informal environments?
4. What does this evidence tell you about your **effectiveness**?
  - a. In what ways does this impact institutional climate?
5. What will you **do** with the information you have gathered about effectiveness?
  - a. How will these findings impact staff learning and development?
  - b. What measurements will you implement to test the effectiveness of these strategies?

*Scorecard Results*

## PRINCIPLE TWO

Ground policies, practices, and decisions in the teachings and living tradition of Saint Ignatius and the Society of Jesus

*Objective: Jesuit social thought continues to be redefined, developed, and applied to contemporary circumstances. Senior leaders of human resources and divisions should make a commitment to hire a sufficient cohort of members who are familiar with Jesuit social teaching, and to provide professional development for all their employees on such matters.*

### **Assessing This Principle**

1. What does this principle **mean** for the institution?
  - a. How does it align with access and equity goals?
  
2. How do you **apply** this principle through programs, policies, & practices?
  - a. To what extent are students engaged so that they understand and respect the Jesuit Catholic teachings which are the foundation of our policies and practices?
  - b. How is the staff engaged in professional development activities focused on Jesuit identity and mission?
  - c. To what extent does the staff's understanding of Catholic Church teaching inform policies and decision making?
  - d. To what extent is the staff able to communicate this understanding to students?
  - e. To what extent does the staff collaborate with others (e.g. colleges, church leaders) to assist with staff development?
  
3. What **evidence** do you have to judge the effectiveness of your efforts?
  - a. To what extent does the evidence demonstrate diversity in formal and informal environments?
  
4. What does this evidence tell you about your **effectiveness**?
  - a. In what ways does this impact institutional climate?
  
5. What will you **do** with the information you have gathered about effectiveness?
  - a. How will these findings impact staff learning and development?
  - b. What measurements will you implement to test the effectiveness of these strategies?

### *Scorecard Results*

## PRINCIPLE THREE

**Creates opportunities for staff to experience, reflect upon, and act from a commitment to justice, mercy and compassion and considering Jesuit Catholic social teaching to develop respect and responsibility for all, especially those most in need.**

*Objective: Because the framework of the Catholic social tradition is vital to the work of staff in Jesuit institutions, it is important for these professionals to become familiar with the tradition and to incorporate it into learning opportunities for students. Central to this work is deepening staff awareness of local, national, and international injustice and grounding this understanding through creative partnering with diverse, underserved communities. Ample opportunities for action and reflection will help all to grow, individually and collectively, in their knowledge and practice of this rich tradition, thereby contributing to the common good.*

### Assessing This Principle

1. What does this principle **mean** for the institution?
  - a. How does it align with access and equity goals?
2. How do you **apply** this principle through programs, policies, & practices?
  - a. How is Jesuit social teaching used as a framework to approach key campus issues?
  - b. To what extent do service opportunities include reflection that is informed by Jesuit Catholic social teaching?
  - c. How do these experiences provide opportunities for students to partner with underserved communities?
  - d. To what extent do staff members in all areas learn about Jesuit Catholic social teaching and incorporate it into their work?
  - e. What activities or programs exist to help students deepen their awareness of local, national, and international injustice?
3. What **evidence** do you have to judge the effectiveness of your efforts?
  - a. To what extent does the evidence demonstrate diversity in formal and informal environments?
4. What does this evidence tell you about your **effectiveness**?
  - a. In what ways does this impact institutional climate?
5. What will you **do** with the information you have gathered about effectiveness?
  - a. How will these findings impact staff learning and development?
  - b. What measurements will you implement to test the effectiveness of these strategies?

*Scorecard Results*

## PRINCIPLE FOUR

### Invite and accompany staff into the habit of reflection

*Objective: Jesuit colleges and universities assist all staff to develop an active and meaningful relationship to humanity of others. Each person's relationship with the world can be further deepened by application of the charisms and spiritual practices of the Jesuit order. Collaboration with the university ministry staff is key to understand and articulate the faith and guiding principles for spiritual growth.*

#### Assessing This Principle

1. What does this principle **mean** for the institution?
  - a. How does it align with access and equity goals?
  
2. How do you **apply** this principle through programs, policies, & practices?
  - a. To what extent do opportunities exist for all staff who are seeking an active and meaningful relationship with God, regardless of their faith tradition?
  - b. What opportunities on campus exist to celebrate the rich liturgical tradition of the Catholic Church, including traditional devotions?
  - c. What sacred space(s) are available for staff and community members on campus?
  - d. What opportunities exist on campus for collaboration between campus ministers and other staff?
  - e. What opportunities exist for the spiritual development of all members of the campus community, particularly for all levels of staff?
  
3. What **evidence** do you have to judge the effectiveness of your efforts?
  - a. To what extent does the evidence demonstrate diversity in formal and informal environments?
  
4. What does this evidence tell you about your **effectiveness**?
  - a. In what ways does this impact institutional climate?
  
5. What will you **do** with the information you have gathered about effectiveness?
  - a. How will these findings impact staff learning and development?
  - b. What measurements will you implement to test the effectiveness of these strategies?

#### Scorecard Results

## PRINCIPLE FIVE

Challenge staff to high standards of personal behavior and responsibility through the formation of character and virtue

*Objective: Staff professional choices should be informed by Jesuit teaching. Where there are tensions between such teachings and current social mores, these differences serve as powerful teaching opportunities. Partnership with the campus ministry leaders provide ongoing opportunities for conversation and other programs to support students in making appropriate choices that show respect for self and others.*

### Assessing This Principle

1. What does this principle **mean** for the institution?
  - a. How does it align with access and equity goals?
2. How do you **apply** this principle through programs, policies, & practices?
  - a. How are expectations for behavior, character, and virtue development discussed and communicated in relation to institutional mission?
  - b. To what extent do staff members develop an understanding of Jesuit moral teaching and its application in Jesuit higher education?
  - c. How are staff members given space and time to develop the capacity for responsible decision making that is informed by Jesuit teaching?
  - d. What opportunities exist to explore issues of treatment of others, moral, and health issues in light of Jesuit teachings?
  - e. What opportunities for inclusive dialogue and learning exist when there are tensions between Jesuit teachings and current social mores?
3. What **evidence** do you have to judge the effectiveness of your efforts?
  - a. To what extent does the evidence demonstrate diversity in formal and informal environments?
4. What does this evidence tell you about your **effectiveness**?
  - a. In what ways does this impact institutional climate?
5. What will you **do** with the information you have gathered about effectiveness?
  - a. How will these findings impact staff learning and development?
  - b. What measurements will you implement to test the effectiveness of these strategies?

*Scorecard Results*

## PRINCIPLE SIX

**Seeks dialogue among faith backgrounds and with contemporary culture to clarify beliefs and to foster mutual understanding in the midst of tensions and ambiguities**

*Objective: Staff working at Jesuit higher education institutions serve in a twofold capacity: to articulate a compelling truth as we understand it and to search for an informed truth as we explore it. While the first is supported by the rich heritage and reflection of a faith community, the second entails openness to other traditions and experiences. Educational institutions thrive on dialogue respectful of differences of points of view and the consequent uncertainties and tensions are vital to the learning mission of colleges and universities. Thus staff serve as examples to students of how to honor faith traditions and experiences and invite them into dialogue for purposes of exploration and insight.*

### **Assessing This Principle**

1. What does this principle **mean** for the institution?
  - a. How does it align with access and equity goals?
  
2. How do you **apply** this principle through programs, policies, & practices?
  - a. In what ways are staff members exposed and engaged with various religious traditions and between their own faith (Catholic or not) and contemporary culture?
  - b. How is dialogue respectful of different points of view implemented?
  - c. To what extent are staff members prepared to sponsor and encourage dialogue and mutual understanding?
  - d. What interfaith space(s) are available for staff on campus?
  
3. What evidence do you have to judge the effectiveness of your efforts?
  - a. To what extent does the evidence demonstrate diversity in formal and informal environments?
  
4. What does this evidence tell you about your effectiveness?
  - a. In what ways does this impact institutional climate?
  
5. What will you do with the information you have gathered about effectiveness?
  - a. How will these findings impact staff learning and development?
  - b. What measurements will you implement to test the effectiveness of these strategies?

### *Scorecard Results*

## PRINCIPLE SEVEN

**Assist staff in discerning and responding to their vocations, understanding potential professional contributions, and decision-making**

*Objective: The discernment process seeks to equip staff to balance and integrate professional, personal, and relational commitments. These privileged conversations can help staff in their search for meaning and purpose by integrating their beliefs, gifts, ambitions, and hopes with the world's needs.*

### Assessing This Principle

1. What does this principle mean for the institution?
  - a. How does it align with access and equity goals?
2. How do you apply this principle through programs, policies, & practices?
  - a. To what extent are career and other life choices understood and articulated in terms of vocation?
  - b. How do human resources staff and divisions engage staff members in a discernment process that integrates their vocation and their career choices?
  - c. To what extent are staff members in these areas prepared to assist others in the discernment process?
  - d. How are staff invited to consider the connection between their careers and Jesuit thought?
3. What evidence do you have to judge the effectiveness of your efforts?
  - a. To what extent does the evidence demonstrate diversity in formal and informal environments?
4. What does this evidence tell you about your effectiveness?
  - a. In what ways does this impact institutional climate?
5. What will you do with the information you have gathered about effectiveness?
  - a. How will these findings impact staff learning and development?
  - b. What measurements will you implement to test the effectiveness of these strategies?

*Scorecard Results*

APPENDIX II

Inclusive Excellence Scorecard

<b><u>IE Area</u></b>	<b><u>Criteria</u></b>	<b><u>Rating</u></b>
Access and Equity	The compositional number and success levels of historically underrepresented students, faculty, and staff in higher education	/5
Diversity in the Formal and Informal Training	Diversity content in the courses, programs, and experiences across the various academic programs and in the social dimensions of the campus environment	/5
Institutional Climate	The development of a psychological and behavioral climate supportive of all students	/5
Staff Learning and Development	The acquisition of content knowledge about diverse groups and cultures and the development of cognitive complexity	/5

APPENDIX III

Consent Form

### Personal Account Release

I, \_\_\_\_\_ (full name) hereby give permission for Terri Lewis-King to record, transcribe, and consider this interview for master's field project.

I understand that I have complete control over how my interview can be used, and can choose to remain anonymous if the interview is used in any form.

I will receive a transcript and/or recording of my interview from Terri Lewis-King for my personal use upon my request.

Terri Lewis-King will not publish anything without my consent, and will do everything to protect my privacy. They will not share my identity or personal information with anyone else.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Phone #

\_\_\_\_\_  
Other way of getting in contact