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Culturally-Responsive Canadian Postsecondary Performance Measurement

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Abstract

Student success has multiple meanings; however, the postpositivist bias prevalent in Canadian postsecondary education restricts how student success is defined and measured. When we standardize measures of student success we assume that the student experience is homogeneous and risk implementing policies and programs based on insufficient information. Unless new evaluation approaches are adopted, it is unlikely postsecondary institutions will generate the knowledge and wisdom needed to serve their regional, national, and international learners and communities. Postsecondary education leaders must be cognizant of the legacy of colonialism and consider cultural congruency between performance measurement systems and local context. This organizational improvement plan proposes a theory of action model for culturally-responsive postsecondary performance measurement that leverages shared governance through participatory, emergent, and appreciative processes and qualitative evaluation methodologies. Perception and socially constructed norms play a pivotal role in addressing the postsecondary education sector's quantitative bias; therefore, an interpretivist lens is used to critically examine the cultural appropriateness of quality assurance and measurement processes at a Canadian university. Culturally-responsive performance measurement requires consideration of diverse worldviews and methodologies. Qualitative evaluation can amplify the lived experiences of students and inform complex policy issues through examination of phenomena and local variability. The next generation of quality assurance requires inclusive decision-making structures to generate collective wisdom and cultivate an ethic of community by engaging community members, faculty, staff, and students as change agents.

Keywords: quality assurance, qualitative evaluation, culturally-responsive, performance measurement, postsecondary education, inclusive leadership

Executive Summary

This organizational improvement plan investigates political and postsecondary education leaders' overreliance on decontextualized quantitative performance measures for evaluating student success. By means of *metaevaluation*—an evaluation of an evaluation system—I will critically examine the cultural appropriateness of quality assurance and measurement processes at a Canadian open access university. I provide evidence for the value of adopting diverse evaluation methodologies, including the use of qualitative performance measures.

This plan focuses on leadership and planning processes in the context of postsecondary education quality assurance; specifically, *mission fulfilment planning and evaluation*, a process designed to track progress towards achievement of the university's vision, mission, and strategic change goals. To support the university's vision to provide a place of belonging for all learners, I aim to improve quality assurance processes, in collaboration with members of the university community, to create space for multiple cultural histories, creative practices, and the perspectives of various social groups. I propose a theory of action model for contextualized, culturally-responsive performance measures that provide actionable information to improve student outcomes.

Chapter 1 investigates the contextual factors that have resulted in an overreliance on quantitative measures and argues why rethinking postsecondary performance measurement systems is necessary for addressing social inequities. Postsecondary institutions continue to operate within a Western evaluation paradigm of linear logic models, quantitative measures, and deficit and reductionist thinking, which falls short of addressing the needs of the local communities and cultures. When systems of performance measurement fail to result in improvements to student success, stakeholders become skeptical of the value of such systems. Furthermore, tensions persist amongst faculty and staff who perceive quality assurance processes as a bureaucratic burden and cultural imposition (Hoare & Goad, 2020).

Three guiding questions inform an approach for resolving the problem of practice. Using an interpretivist cultural lens, I aim to understand the problem by asking:

1. How can quality assurance practitioners support postsecondary institutions with the adoption of qualitative performance measures for evaluating institutional effectiveness?
2. What leadership strategies facilitate continuous quality improvement in a culturally diverse environment?
3. How can culturally appropriate performance measures and diverse evaluation methodologies be systemized using limited institutional resources?

A synthesis of experience and extant research offers guidelines for addressing the limitations of dominant Western evaluation paradigms that are designed to classify, compare, and rank individuals and groups (Smith, 2012). The guidelines form a theory of action model for culturally-responsive performance measurement underpinned by five principles: participatory, emergent, appreciative, qualitative, and catalytic.

Chapter 2 describes inclusive and constructivist leadership approaches that will enable reciprocal learning and foster leadership capacity through a relational approach to evaluating institutional effectiveness and student success. Implementing principles of culturally-responsive performance measurement requires an inclusive leader who demonstrates intercultural competence, including self-awareness, perspective-taking, listening, relationship building, and cultural humility (Deardorff, 2020). Furthermore, a robust collaborative committee culture that follows a distributed leadership model is proposed as a mechanism for improving dialogue and democratic decision-making.

Chapter 3 charts a framework for implementing the solution that is ethically-grounded. Principles-focused evaluation (Patton, 2018) is recommended as a non-linear, highly individualized evaluation method that builds upon the university's core values of diversity and inclusion, community-mindedness, curiosity, and sustainability. Following a principles-focused approach allows for change

leaders to be adaptive to the social, historical, and cultural complexities of an organizational context (Cousins et al., 2013) and responsive to the evolving needs of a diverse student population. In addition, a communication strategy designed to disrupt current patterns and reduce the perceived bureaucratic burden of quality assurance processes is described. The strategy incorporates collaborative sense-making (Weick et al., 2005) through dialogue and frequent formal and informal interactions by expanding upon existing institutional governance structures.

Chapter 3 culminates in a brief discussion regarding the merits of alternate frameworks for viewing the problem of practice, including transformative and postmodern theories, and their contribution to improving the proposed theory of action model. Further research should explore the transferability of the model for cyclical program review, employee performance planning, departmental reviews, and other postsecondary performance measurement systems.

In conclusion, culturally-responsive approaches to mission fulfilment planning and evaluation necessitate equitable and participatory processes. The change leader, the university's quality assurance practitioner, is well-situated between postsecondary administrators and academics to enable collaborative, inclusive decision-making processes to generate the collective wisdom required to respond to the call to action for culturally-responsive performance measurement. With this plan, the change leader and university have the potential to positively influence student success, regardless of the multiple definitions of student success present in postsecondary education.

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Thank you, Lena, Lisa, and Kristopher, for the shoulders to lean on; and, Cheryl, for opening my eyes to new ways of seeing the world.

Throughout this organizational improvement plan, I will advocate for a balance of epistemological and methodological diversity in mission fulfilment planning and evaluation processes; however, I acknowledge that, as a white, educated, cisgender female settler living on unceded Indigenous land, I cannot claim to fully know the multitude of theoretical frameworks that will be referenced here. Rather, in writing this organizational improvement plan, I seek to inspire engagement with research and evaluation methodologies that exist beyond dominant Western Eurocentric paradigms. To borrow the subtitle from Fine's (2017) powerfully poignant text, I aim for "widening the methodological imagination" in terms of Canadian postsecondary performance measurement by engaging with the local expertise of members of the communities my institution serves.

I further acknowledge that the writing of this organizational improvement plan took place on the traditional lands of the Tk'emlúps te Secwépemc within Secwépemc'ulucw, the traditional and unceded territories of the Secwépemc peoples. I would like to thank them for allowing me to be here as a guest. Kukwstsétselp.

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Acronyms

BC (British Columbia)

CBAM (Concerns Based Adoption Model)

IR (Institutional Research)

NSSE (National Survey on Student Engagement)

PEAQC (Participatory, Emergent, Appreciative, Qualitative, Catalytic)

OD (Organizational Development)

PLC (Professional Learning Community)

QA (Quality Assurance)

UNDRIP (United Nations Declaration on the Rights of Indigenous Peoples)

WEIRD (Western, Educated, Industrialized, Rich, Democratic)

Glossary of Terms

Accountability: Summative, judgmental assessment for external, compliance purposes. Performance measures are typically standardized, quantitative, and comparative. Communication methods are oriented for political or public consumption through aggregated and generalizable data sets.

British Columbia (BC) Accountability Framework: A planning and reporting process for BC's public post-secondary education system that operates as an accountability mechanism to ensure ongoing social and economic development that benefits people living within BC (Government of British Columbia, n.d.a).

Constructivist Leadership: Involves "fostering capacity through the complex, dynamic processes of purposeful, reciprocal learning" (Lambert et al., 2016, p. 10). A well-designed dynamic system, constructivist leadership includes: connection, communication, and collaboration.

Context: The geographic location, including the physical and virtual space, the cultures within the space, the diverse backgrounds of the university community members, and the political, economic, religious, and social factors impacting the space (Deardorff, 2020).

Culture: A set of "distinctive spiritual, material, intellectual, and emotional features" (United Nations Educational, Scientific, and Cultural Organization, 2001, para. 6.) evident within a social group that includes shared values and beliefs, symbols, artifacts, and traditions, as well as common underlying assumptions about the nature of behaviour, which inform what is considered socially acceptable (Schein & Schein, 2017).

Culturally-Responsive Performance Measurement: Entails purposeful attention to the sociohistorical elements of culture in planning and evaluation practices, and examines the impact of institutional initiatives through the worldview of participants (Frierson et al., 2002). In addition, it includes culturally relevant measures that are derived from community-defined values (DeLancey, 2020) and requires meaningful partnerships with participants through inclusive evaluation practices.

Democracy: Democracy within a collegial community is defined as a place where individuals are committed to open inquiry and inclusion of diverse perspectives, where decision-making is centred on the common good of the community (Furman & Starratt, 2002), and enacted through policies and processes that support human flourishing.

Improvement: Formative assessment for internal use, informed by an engagement ethos, which includes multiple triangulated means, including both quantitative and qualitative measures, that are tracked over time. Improvement measures stem from an established goal or objective, which are defined by members internal to the organization. Multiple communication channels and opportunities for dialogue exist, and results are used to inform change.

Inclusive Leadership: The collective capacity "for relational practice, collaboration, building inclusion for others, creating inclusive workplaces, and work cultures, partnerships and consensus building" (Wasserman, 2015, p. 335). This definition of inclusive leadership follows Cox (2020) who described inclusive leadership as a form of distributed leadership. Further, I assume that leadership is a shared process that addresses exclusion and leverages diversity (Gallegos, 2014; Ferdman, 2014) with the aim to empower those who traditionally experience disadvantage due to discrimination and the reduction and erasure of different ways of knowing.

Intercultural: Defined as “acquiring increased awareness of...cultural contexts (worldviews), including one’s own, and developing a greater ability to interact sensitively and competently across cultural contexts” (Bennett, 2009, p. 1). Leaders with intercultural competence demonstrate self-awareness, empathy, listening, relationship building, and cultural humility (Pusch, 2009).

Leadership: A process whereby a person “influences a group of individuals to achieve a common goal” (Northouse, 2019, p. 5). Emerging research emphasizes the *process* of leadership as an interactive event between leaders and followers and the resulting impact as opposed to the traits or characteristics of an individual (Lambert et al., 2016).

Management: The primary outputs of management are planning, budgeting, organizing, staffing, controlling, and problem-solving (Northouse, 2019). Kotter (1990) described the main function of management as maintaining order and stability. In contrast, the main function of leadership is adaptive and constructive change, which is achieved through establishing direction, aligning people, and motivating individuals towards a common goal. Both roles, argued Kotter (1990), are essential functions of an organization.

Metaevaluation: A systematic evaluation of an evaluation system used to critically examine and determine the quality of the associated processes and procedures. A metaevaluation includes “delineating, obtaining, and applying descriptive and judgemental information” (Thomas & Campbell, 2021, p. 197) about the utility and integrity of an evaluation system.

Mission Fulfilment Planning and Evaluation: A phrase used at Sage to describe a process for monitoring, evaluating, and reporting on the university’s progress towards achieving its mission. It involves a synthesis of performance based on multiple criteria, and includes setting objectives, outcomes, indicators, and targets that are assessed to inform continuous quality improvement.

Neoliberalism: The ideological belief that the market is the best predictor of performance. A neoliberal era of education prioritizes human capital and marketization through efficient and effective allocation of taxpayers’ resources (Cowin, 2017), commodification (Ball, 2012), managerialism (Marginson & Considine, 2000), academic capitalism (Slaughter & Rhoades, 2012), and global education markets (Bozheva, 2019).

Performance Measure: An indicator, either quantitative or qualitative, of program or organizational results that includes: inputs, outputs, processes, and outcomes (McDavid et al., 2018). Performance measures are goal-oriented and are used to collect information to track progress, at regular intervals, to assess the performance of a system (Fitz-Gibbon, 1990). Rarely in postsecondary education are qualitative measures used. Instead, they are usually quantified indicators of outputs, such as retention rate or time-to-completion.

Performance Measurement: A process designed to implement and track progress towards achievement of program or organizational goals. For the purposes of this organizational improvement plan, performance measurement refers to the processes used by the university that meet the accreditor’s standard for measuring and evaluating institutional effectiveness, which include the articulation of the university’s commitment to student success, primarily measured through student learning and achievement, and the identification of indicators and benchmarks for effectiveness. At Sage, the performance measurement system is the *mission fulfilment planning and evaluation process*.

Qualitative Performance Measure: An indicator that relies on words, rather than numbers, as the primary source of data (McDavid et al., 2018), to explore and understand the lived experiences of individuals or groups to address a social problem (Creswell & Creswell, 2018). Examples of qualitative data include: interviews, focus groups, observations, and participant-generated visual data (Thomas & Campbell, 2021).

Quality Assurance (QA): The policies, procedures, and processes used to ensure high standards of quality and excellence (Harvey & Green, 1993), and that an institution is meeting its mandate and mission. At Sage, one framework used for assuring quality is the accreditor's (2020) *Standards of Accreditation*.

Quality Assurance (QA) Practitioner: The author of this organizational improvement plan and change leader responsible and accountable for leading, planning, and managing quality assurance processes at Sage. The QA practitioner oversees institutional alignment between accreditation requirements, strategic planning, and other cycles of data collection to ensure an integrated planning approach to institutional effectiveness.

Quantitative Performance Measure: An indicator that relies on numerical data. Quantitative performance measures are strongest for "simple, technocratic issues" (Beerkens, 2018, p. 281), yet insufficient for the complexities of real life. Quantitative performance measures are a useful diagnostic tool for tracking progress; however, woefully inadequate for understanding students' lived experiences.

Sage University (Sage): A pseudonym for a publicly funded, comprehensive, open access university located in Western Canada.

Sense-making: Defined as "the ongoing retrospective development of plausible images that rationalize what people are doing" (Weick, et al., 2005, p. 409). Sense-making is inherently rooted in context and culture, whereby the ways in which people behave and make sense of their environment is shaped through dialogue and stories, which are then passed on to others. Sense-making is a social process.

Standards of Accreditation: "Define the quality, effectiveness, and continuous improvements expected of accredited institutions." (Accreditor Handbook, 2020, p. 12). This organizational improvement plan focuses on *Standard One: Student Success and Institutional Mission and Effectiveness*, which requires that Sage articulate "its commitment to student success, primarily measured through student learning and achievement, for all students, with a focus on equity and closure of achievement gaps" (Accreditor Handbook, 2020, p. 12).

Western (Eurocentric) Evaluation Paradigm: Western concepts include socially constructed systems of representation, classification, comparison, and ranking (Hall, 1992). Eurocentrism refers to the "cultural phenomenon that views the histories and cultures of non-Western societies from a European or Western perspective" (Pokhrel, 2011, para. 1). Western evaluation practices are characterized by linear, hierarchical thinking and presume that planning processes can be predictive. Western evaluation methods are in opposition to the standards of some Indigenous communities, such as: individual achievement over collective, labour market readiness over moral development, quantitative metrics over qualitative narratives, and efficiency and expeditiousness over time for deliberation and contemplation (Anderson & Smylie, 2009; LaFrance & Nichols, 2009).

Chapter 1: Introduction and Problem

This organizational improvement plan focuses on a university in Western Canada that aspires to provide a place of belonging, “where all people are empowered to transform themselves, their communities, and the world” (Sage, 2020, p. 1). The university has established a high bar for quality assurance, as evidenced by it voluntarily seeking institutional accreditation. The university’s aspiration for excellence is accompanied by increased requirements for rigour, which are frequently misconstrued as bureaucracy, regulation, and control by academics. Therefore, this plan aims to address the seemingly disharmonious fundamentals of quality assurance: accountability and improvement.

What follows is an exploration of how university stakeholders understand quality assurance in the context of performance measurement. An interpretivist cultural lens is used to critically examine the cultural appropriateness of quality assurance and evaluation processes at the university. Through this investigation, I will ponder what underpins differing perspectives and discuss how a proposed intervention of adapting existing systems to incorporate culturally-responsive performance measures can support the university’s vision to provide a place of belonging for all learners.

Organizational Context

Sage (pseudonym) is an open access university in Canada. One of five postsecondary institutions in British Columbia (BC) established in the 1960s and 1970s to meet the needs of rural and Indigenous communities, Sage serves as a mechanism to increase access and strengthen communities beyond the large urban centres of the southern coast (Dennison, 2006). A grand social experiment, Sage contradicted traditional binary models of postsecondary institutions (Cowin, 2017; Garrod & Macfarlane, 2009) by combining a community college and a research university.

The community college culture values teaching excellence, egalitarian access, and vocational training. For nearly three decades, Sage was accustomed to a model of governance reliant on the provincial government (Barnsley & Sparks, 2009). In the early 2000s, Sage transformed into a

comprehensive special purpose university. In contrast to the community college culture, the university culture values institutional autonomy, academic excellence, research, prestige, and self-promotion.

One cannot deny that these divergent cultures have shaped Sage's ability to think strategically and work cohesively towards a shared vision. Many scholars questioned the ability of an institution to thrive with these two distinct cultures and somewhat ambiguous purpose (Cowin, 2017; Dennison & Schuetze, 2004; Gaber, 2002; Levin, 2003). Consequently, the transition from a teaching-centric mission to a more research intensive one, with increased diversity of programming and a complex mix of faculty roles, has created a mosaic of perspectives regarding the purpose of the university.

Macro-Cultural Context

Postsecondary strategic processes are heavily influenced by external demands on the organizational environment forcing Sage to conform in order to warrant its legitimacy (Frølich & Stensaker, 2013). As a publicly funded institution, the political, economic, and sociocultural factors influencing Sage are impacted by international, national, and provincial contexts. Globally, a prioritization of efficiency and consumerism, such as measuring return on investment through graduate outcomes (Schneider & Peek, 2018), shifts the focus away from an ethic of community (Furman, 2004) and cultivating the diverse cultural knowledges and histories of rural communities. Instead, attention is diverted to garnering research funding, global rankings, recruitment beyond catchment areas, and growth in advertising and marketing.

Driving this cultural orientation is a *neoliberal* philosophy of postsecondary education, which assumes that "the only knowledge worth pursuing is that with more or less immediate market value" (Busch, 2014, xii). The problem with this short-sighted thinking is that the market does not help organizational leaders address the social processes aimed at coordinated efforts and commitment to quality, nor the systemic inequities perpetuated by meritocracies.

Nationally, postsecondary institutions are functionally-oriented organizations bound by legislation and policy reflective of their external environment. Since the 1990s, this environment has become increasingly market-driven (Davidson-Harden et al., 2009), in part as a result of a large-scale deficit reduction program initiated by the federal Liberal Party (Robson, 2019). This era of education prioritizes human capital and marketization through efficient and effective allocation of taxpayers' resources (Cowin, 2017), commodification (Ball, 2012), managerialism (Marginson & Considine, 2000), academic capitalism (Slaughter & Rhoades, 2012), and global education markets (Bozheva, 2019). This is most evident in public policy that funnels students into areas of immediate labour market need or federally coordinated efforts to recruit international students for profit, rather than cultivating creativity and critical thinking.

Whether or not neoliberalism exists in Canada in 2021 is up for debate. Some scholars argue Canada is entering a *supra*-neoliberal era (Bozheva, 2019), one in which the education industry becomes a national priority, as evidenced by coordinated approaches to the commodification of education, such as the federal government's approach to international students. Others predict a *post*-neoliberal period (Cowin, 2017), one in which the government invests in programs that reduce inequities, such as increasing grants for Indigenous learners and youth-in-care. Still others sardonically question whether Canadian postsecondary institutions could ever be conceived of as neoliberal at all (Usher, 2017). Regardless of one's perspective, Canadians walk a tenuous line between prioritizing economic interests over social justice.

Canada is one of few countries in the Organization for Economic Co-operation and Development lacking a system of institutional accreditation for postsecondary institutions (Stubbs et al., 2011). Lacking an internationally recognized quality assurance framework, the onus falls upon postsecondary institutions to prove their validity in an increasingly competitive, globalized postsecondary education environment.

Provincially, quality assurance of postsecondary institutions is conceived of as part of a larger framework. In BC, there is a significant degree of collaboration and coordination in an effort to widen access to university degrees, as evidenced by an enviable academic credit transfer system (Bekhradnia, 2004). The 25 post-secondary institutions in the province participate in BC's *Accountability Framework* (Government of British Columbia, n.d.a), which tracks progress and plans related to institutional and system objectives.

Evidence suggests BC may be entering into a post-neoliberal era as the provincial government's singular devotion to a marketization agenda is shifting (Cowin, 2017). One can map this paradigm shift over a seven-year period by examining Sage's mandate letters (Appendix A). In 2017, the most notable political shift towards social justice occurred, which correlates with the election of the New Democrat Party following the Liberal Party's dominant 16-year run. This political turn had a profound impact on postsecondary policy by drawing attention to student safety, prioritizing vulnerable and underrepresented domestic students, and responding to the Truth and Reconciliation Commission of Canada's (2015) *Calls to Action* and the *United Nations Declaration on the Rights of Indigenous Peoples* (United Nations General Assembly, 2007).

The most striking evidence suggesting BC is entering a post-neoliberal era is the shift in the perceived value of international students in 2020/21 (Appendix A), which swings from one of revenue-generation to a student-centred framework that supports international student success. This paradigm shift is congruent with Sage's vision, at the heart of which is inclusion and diversity. Articulating and embedding Sage's vision into the fabric of the institution is fundamental to ensuring the university continues to meet the needs of its community in an unstable political environment.

Vision, Values, and Goals

In 2020, Sage adopted a new vision statement and articulated values and strategic change goals, which are firmly underpinned by principles of social justice. Sage has a diverse student demographic:

over 10% of students are Indigenous from a variety of nations, roughly 35% join Sage from more than 100 countries around the globe, and one third are mature (over 25 years of age). As such, the students' and communities' needs are as diverse as the comprehensive programming offered.

To best serve its students, Sage is guided by values of inclusion and diversity, community-mindedness, curiosity, and sustainability. Sage aspires to eliminate opportunity gaps; honour truth, reconciliation, and rights of Indigenous peoples; lead in community research and scholarship; and, design lifelong learning (Sage, 2020). To assure that Sage is fulfilling its mission, the university created a *mission fulfilment planning and evaluation process* for monitoring performance that is embedded within the university's governance structure. Sage's framework for mission fulfilment planning and evaluation, which guides performance measurement of institutional effectiveness and student success, was first established in 2018 following a recommendation from its accreditor to create a more robust integrated planning process with measurable outcomes that represent an acceptable threshold of mission fulfilment.

Organizational Structure and Governance

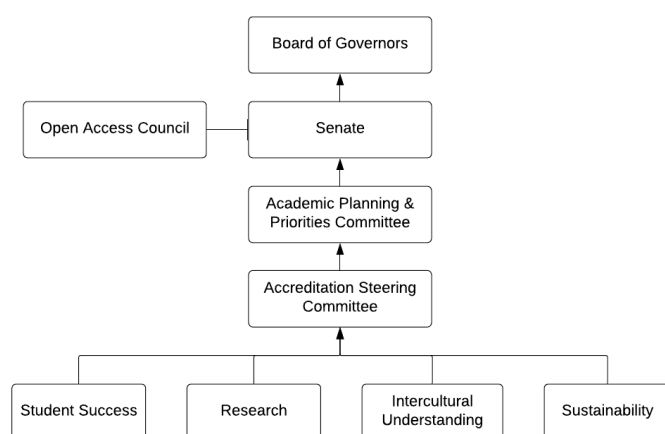
Sage operates under a tricameral governance structure (Provincial Government, 2005), which includes a board of governors, senate, and open access council. The three governing bodies are held accountable and responsible for meeting the educational quality standards of the provincial government and Sage's institutional accreditor. Senior leadership take a team-based approach to collaboratively foster fulfilment of the university's mission. Sage's collegial governance structure has numerous touchpoints and opportunities for faculty, staff, and students to participate. Despite this, historical norms of compliance and individualism, lack of trust in senior leadership, and low sense of agency have led to passive engagement of university stakeholders creating a weak and fragmented capacity for shared leadership.

From the beginning, Sage sought to design a mission fulfilment planning process that is iterative,

participatory, self-reflective, and evidence-based. Due to Sage’s robust committee culture, the university chose to embed mission fulfilment planning within four standing committees of Senate to facilitate a culture of participative governance. The committees are responsible for reporting on institutional effectiveness in relation to four core themes: student success, sustainability, intercultural understanding, and research (Figure 1). Membership across the committees comprises approximately seventy students, faculty, and staff.

Figure 1

Mission Fulfilment Governance



Due to the diversity of committee mandates and membership, senior leadership recognized the need to provide the committees with expertise in quality assurance processes. As a result, the committee terms of reference were revised to include the university’s quality assurance practitioner as an ex-officio non-voting member for the purposes of facilitating reporting requirements.

To date, the committees have been operating autonomously from one another, which has resulted in a siloed approach to mission fulfilment planning. A siloed approach can lead to a closed system—a system that has no transactions with agents beyond its borders resulting in stagnation and entropy (Koenig, 2018). This siloed approach further limits the university’s capacity to leverage interdisciplinary expertise. However, under the right conditions, the committees have potential to leverage inclusive and collaborative decision-making processes to enhance sense-making (Weick, 2005)

and broaden non-positional leadership authority across the university.

Leadership Position and Lens Statement

This organizational improvement plan is written from the perspective of the change leader: Sage's quality assurance practitioner. As the quality assurance practitioner, I am responsible and accountable for *leadership*—establishing direction, aligning committees, and motivating individuals towards a common goal (Northouse, 2019)—and *management*—planning, organizing, and maintaining stability (Kotter, 1990)—of quality assurance processes, as well as engaging in activities that move Sage towards a continuous quality improvement model for all academic processes. I oversee institutional alignment between accreditation requirements, strategic planning, and other cycles of data collection to ensure an integrated planning approach to institutional effectiveness.

Agency and Power

Structurally, I hold non-positional leadership authority; however, I have a strong reporting line to the Provost. In addition, I am an ex-officio non-voting member on the four standing committees of Senate responsible for mission fulfilment planning and evaluation in a facilitative capacity (Figure 1). Thus, I am perfectly situated within the organization to facilitate a community of leaders (Barth, 1988), an interactive process of shared leadership and collective agency. This is an ideal model for facilitating collaborative inquiry and dialogue, which requires strong and frequent interaction across all levels of the university. My agency lies in the capacity to work both horizontally and laterally to mediate institutional silos (Fullan & Gallagher, 2020).

Whitchurch (2008) described quality assurance practitioners as an emerging third space between academia and line management. In this role, I must be cautious of being perceived as an “illegitimate interference” (Seyfried & Pohlenze, 2018, p. 259), an interference commonly associated with faculty concerns over the rise of new public management in postsecondary education (Marginson, 2012). New public management is evident when institutions focus on performance results and

competition and when policy decisions are detached from those required to execute them (Christensen, 2008; Pollitt & Bouckaert, 2011). Therefore, quality assurance practitioners are placed in a tenuous position as the perception of holding too much managerial power is equated with regulation and control (Seyfried & Pohlenze, 2018).

Throughout this organizational improvement plan, I will advocate for a balance of epistemological and methodological diversity in mission fulfilment planning and evaluation processes. However, I acknowledge that, as a white, cisgender female settler living on unceded Indigenous land, I cannot claim to fully know the multitude of culturally diverse theories that will be referenced in this text. Rather, through writing I seek to inspire engagement with research and evaluation methodologies that exist beyond dominant Western evaluation paradigms. To borrow the subtitle from Fine's (2017) powerfully poignant text, I aim for "widening the methodological imagination" in terms of Canadian postsecondary performance measurement by engaging with the local expertise of members of the communities Sage serves.

Leadership Paradigms

Perception and socially constructed norms are a pivotal factor in my success as I work through the elements of this organizational improvement plan. Effectively navigating this third space (Whitchurch, 2008) to develop sustainable relationships may lie in my ability to understand the social nature of learning and the role of context and culture in organizational change. A leadership paradigm that facilitates understanding of the sociocultural dynamics that converge to create tension and resistance amongst faculty and administration is interpretivist cultural theory (Manning, 2018; Weick, 1979). Furthermore, an interpretivist cultural lens can be used to critically examine the cultural appropriateness of quality assurance and measurement processes at Sage. In addition, distributed inclusive leadership (Cox, 2020; Gallegos, 2014; Ferdman, 2014; Wasserman, 2015) and constructivist

leadership (Lambert et al., 2016) provide the theoretical grounding for reciprocal and relational learning aimed at continuous quality improvement.

Interpretive Science

Interpretive science is rooted in social science hermeneutics and focuses on how subjectivity and intersubjectivity (Berger & Luckman, 1966) inform our understanding of the social world (Putnam, 1983; Weick, 1979; Weick et al., 2005). An interpretivist lens acknowledges the importance of social and historical factors in how people construct meaning (Dilthey, 2002). Interpretivists assume that a person's lived experiences inform their mental models, which are used to interpret the actions of others, guide their behaviour, and situate themselves within their environment. These schemata can limit or empower an individual's decision-making as an awareness of one's position within a hierarchical or egalitarian organization informs how they behave and whether or not they voice an opinion.

Weick (1995) argued that organizations are inherently pluralistic and that sense-making is influenced by tacit knowledge of norms, rules, structures, processes, and prior events. Additionally, members of the organization interact to create and/or reinforce meaning. Tacit knowledge shapes our interpretation of events and interactions with others (Hatch & Yanow, 2005) and how we perceive the value of postsecondary education, among other things. For this reason, I must pay attention to communicative processes, which include the work of university committees and the writing of evaluation reports (Jazarbkowski et al., 2007).

Cultural Theory

In the 1960s and 1970s the field of organizational culture theory relied heavily on postpositivism, empirical research, and quantitative methods. In the 1980s, an alternate scholarly perspective that emphasized qualitative and subjective inquiry gained renewed interest (Martin, 2005). Since 2000, evaluation scholars recognized the value of integrating quantitative and qualitative methods as a stronger, more comprehensive means for measuring progress (Thomas & Campbell, 2021).

However, this paradigm shift has not translated to North American postsecondary performance measurement systems. Instead, government, accreditors, and institutions continue to measure quality based on less informative input and output measures (Chalmers, 2008) despite evidence that more robust measures are necessary (Fine, 2017).

The significance of this failure to modernize performance measurement systems is concerning due to the limitations of quantitative measures. Without context and culturally-supported narrative, performance measures lack meaning and insight (Shavelson, 2009). To understand gaps within the system and to modernize Sage's mission fulfilment planning and evaluation process, requires that I adopt an ontological position of relativism, which is the belief that knowledge exists in relation to context and culture, and an epistemological view of subjectivism, the recognition that there is no universal truth (Greene & McClintock, 1991).

Schein and Schein (2017) define *culture* as the "learned patterns of beliefs, values, assumptions, and behavioural norms that manifest themselves at different levels of observability" (p. 2). Examples of observable culture at Sage include provincial mandate letters, performance measures, and strategic change goals. Group norms, "the implicit standards and values that evolve in working groups" (Schein & Schein, 2017, p. 4), are evident in Sage's university committees and demonstrated by transactional rather than relational behaviours. These dimensions form the "cultural DNA" (Schein & Schein, 2017, p. 7) of an organization. I will examine Sage's cultural DNA in more detail under *Framing the Problem of Practice*.

Distributed Inclusive Leadership

It is my philosophical belief that learning is a relational and reciprocal process. An approach proposed by scholars as "an antidote or corrective to heroic individualism" (Gronn, 2010, p. 407) and a remedy for the crises of increased managerial control, competition, and external scrutiny (Jones et al., 2012) is distributed leadership. Considering that I facilitate mission fulfilment planning and evaluation

through the work of four university committees, having a leadership approach that works with teams of people is paramount. Thus, distributed leadership is a critical choice for addressing this problem of practice.

Distributed leadership theory evolved in the early 2000s from distributed cognition theory and active theory (Hutchins, 1995), which assume that knowledge is dispersed across people and tools, is both situational and contextual (Gronn, 2000, 2002), and that cultural, societal, and historical factors influence human agency and development (Engestrom, 1987). An important clarification to make is that distributed leadership is not a type of leadership but rather a situation whereby power, agency, and voice are shared so that multiple people influence project outcomes (Gronn, 2010).

Inclusive leadership, a form of distributed leadership (Cox, 2020), offers an alternative to the traditional patriarchal hierarchies and advocates for a circular structure led from the centre as opposed to from the top-down. The term inclusive has a contested and complex history, particularly as it relates to educational environments. Slee (2009) cautioned that empowerment, a key concept of inclusive leadership, caters to those already empowered. England and Brown's (2001) research demonstrated that western-centric frames dictated what was considered inclusive in an educational setting. Sensoy and DiAngelo (2016) argued that common guidelines for inclusive educational settings are often not responsive to power relations. For example, advocating for fairness by allowing equal time for all narratives assumes that all narratives have equal airtime in our everyday lives (Sensoy & DiAngelo, 2016). Instead, Sensoy and DiAngelo (2016) recommended that restricting dominant narratives creates greater equality.

My understanding and application of inclusive leadership is in line with recommendations from Sage's Anti-Racism Taskforce (2021) who defined inclusion as "the action related to genuinely allowing for different ways of being and knowing to participate fully in every aspect of life. It involves empowerment of those who traditionally experience disadvantage due to racialization" (Anti-Racism

Taskforce, 2021, p. 24). Beyond this definition of inclusion, I assume that inclusion cannot occur without leadership. Further, I assume that leadership is a shared process that addresses exclusion and leverages diversity (Gallegos, 2014; Ferdman, 2014). Therefore, the way in which the term inclusive leadership is used herein follows Cox (2020) who described inclusive leadership as a form of distributed leadership.

As the change leader, I must choose to prioritize ways of knowing, such as stories, voices, and other rich sources of data, that have been historically excluded in postsecondary performance measurement systems (BC Office of the Human Rights Commissioner, 2020) and to advocate for greater representation of marginalized groups on university committees and in decision-making regarding mission fulfilment planning and evaluation. Based on my understanding of inclusive leadership as an extension of distributed leadership, I will refer to distributed inclusive leadership simply as inclusive leadership in the remainder of this text.

Helgesen's (2005) webs of inclusion resonates strongly with my positional authority as Sage's quality assurance practitioner by validating non-positional power and focusing on relationships, connections, and expertise. The first principle of webs is open communication whereby information is shared freely as opposed to being reserved for the privileged few. Open communication is an essential component of successful performance measurement systems because, without candor, collaboration, and transparency, we cannot gain deep insight and wisdom from performance measurement data (Spitzer, 2007).

Constructivist Leadership

Finally, in seeking a leadership approach that resonates with Sage's vision and my scope of influence, worldview, and the way in which I enact leadership within the organization, the most instinctive approach is constructivist leadership (Lambert 1998, 2004, 2009; Lambert et al., 2002). The key theoretical principles underpinning constructivist leadership resonate strongly with an interpretivist cultural lens. In particular, interpretivist scholars assert that meaning is socially constructed through

interactions with others (Creswell & Creswell, 2018). Similarly, constructivist leadership assumes that leadership, change, and learning are developmental, continuous, reciprocal, and action-oriented.

Organizational strategic planning is inherently a social process, whereby meaning is socially interpreted, constructed, and enacted (Pye, 1995); therefore, the pluralistic approach of interpretivists helps quality assurance practitioners understand diverse perspectives of university stakeholders. Moreover, to make sense of and change such practices requires that I understand how culture influences mission fulfilment planning and evaluation at Sage. This requires an inclusive and constructivist leadership approach, which assumes change is a shared process of learning.

The inherently continuous nature of quality assurance and my positional power and agency warrant collaborative, reciprocal leadership approaches. To fully understand the complexity of Sage and its vision, mission, and stakeholders necessitates an interpretivist cultural lens. Pivotal elements that contribute to the university's complexity, and which form the problem of practice, will be discussed below.

Leadership Problem of Practice

The problem of practice that will be addressed is an overreliance on decontextualized quantitative performance measures to evaluate institutional effectiveness and student success at a Western Canadian open access university. Measures are "markers of success, progress, or change" (Thomas & Campbell, 2021, p. 289). Quality assurance practitioners are required by external regulators to ensure their institution has a continuous process to assess institutional effectiveness and mission fulfilment, yet tensions persist between stakeholders who associate quality assurance with accountability rather than continuous quality improvement (Bendermacher et al., 2016; Busch, 2014; Ewell, 2009; Kelchen, 2018; Vettori, 2012, 2018). The university adheres to neoliberal definitions of student success to evaluate mission fulfilment, evidenced by the prevalence of quantitative aggregated measures, such as enrolments, credentials awarded, and student satisfaction ratings that are detached

from the organizational context and culture. A utilitarian mindset denies the inclusion of performance measures that address issues of equity, enhance participatory processes, and inform policy changes that are relevant to community needs. Quality assurance systems that fail to address the values of its constituents result in overt and covert forms of resistance. What epistemological frames and evaluation methodologies better serve the unique needs of the regional, national, and international communities the university serves?

Context refers to the geographic location, including the physical and virtual space, the cultures within the space, the diverse backgrounds of the university community members, and the political, economic, religious, and social factors impacting the space (Deardorff, 2020). *Culture* is understood as a set of “distinctive spiritual, material, intellectual, and emotional features” (United Nations Educational, Scientific, and Cultural Organization, 2001, para. 6.) evident within a social group that includes shared cognitive models, artifacts, beliefs, values, and behaviours (Schein & Schein, 2017).

A standardized, objective approach to public policy, based on decontextualized quantitative performance measures, became prevalent in the 1990s in the form of new public management, the construct for which European philosophers and historians have coined the evaluative state (Henkel, 1991; Neave, 2012). This resulted in externally imposed conditions and standards that undermine the democratic traditions of postsecondary education (Neave, 2012). North American performance measurement systems have a determinist preference for generalizability with measures often based on homogenous groups of 18-24-year-old white males (Kirkhart, 2010; McCormack et al., 2014), which ignores diverse student demographics. Sadly, this reinforces the belief that policies and processes are objective, colour blind, and that the university is a meritocracy (Anderson, 2020).

While political and academic leaders acknowledge the contextualized nature of education, little evidence exists of postsecondary institutions that embed qualitative methodologies into performance measurement systems. However, qualitative research and evaluation can inform complex policy issues

by examining phenomena, local variability and, most importantly, amplify the lived experiences of students.

One potential explanation for political and postsecondary education leaders' preference for quantitative performance measures may be a tunneling bias. Tunneling refers to the reliance on data that is easily accessible, measurable, and quantifiable as opposed to seeking out or developing new sources, which often requires more effort (Koenig, 2018). One variable contributing to a tunneling bias at Sage is external performance standards; specifically, institutional requirements under the Government of British Columbia's (n.d.a) *Accountability Framework* (Appendix B). The prescribed performance measures are heavily oriented towards efficiency and generation of human capital. Despite a heartening political shift in 2017, the market continues to drive decision-making into 2021. This is evidenced by documentation of culture as a categorical, static variable by counting Indigenous and international learners as opposed to a practice-oriented focus on the intersections of context and culture by exploring individual, institutional, and interactional factors (Trainor & Bal, 2014).

While the quantitative measures are only one part of the reporting process in BC, the system lacks the requirement to qualitatively measure students' lived experiences. Thus, it is up to Sage to track its own goals and performance measures in order to be responsive to the context and cultures of the students and communities it serves. *Culturally-responsive performance measurement* entails purposeful attention to the sociohistorical elements of culture in planning and evaluation practices and examination of the impacts through the worldview of participants (Frierson et al., 2002). It respects cultural beliefs and protocols and applies culturally relevant measures that are derived from community-defined values (DeLancey, 2020). Thus, a performance measurement system is culturally-responsive when context and culture are fully considered in the design, implementation, and outcomes of the system (Hood, 2014), which requires meaningful partnerships with participants through inclusive evaluation practices.

This *metaevaluation*—an evaluation of an evaluation system—will explore research- and experiential-informed practices for improving Sage’s performance measurement system. The metaevaluation will include “delineating, obtaining, and applying descriptive and judgemental information” (Thomas & Campbell, 2021, p. 197) about the utility and integrity of Sage’s mission fulfilment planning and evaluation process, and pay close attention to issues of context and culture. The next section will frame the problem in relation to internal and external factors, including political, economic, sociocultural, technological, and environmental elements.

Framing the Problem of Practice

Historically, Sage has not adopted contextualized performance measures that provide actionable information for improving student outcomes. Sage adheres to the status quo by reporting on prescribed quantitative measures that offer insufficient information for continuous improvement. This problem of practice is framed by Sage’s internal and external environment, which are profoundly interconnected. By analyzing the internal and external factors impacting the university, I will argue why change is required and identify components of the organization that need to change. Using a PESTE analysis (Deszca et al., 2020), I will examine the context in which Sage’s mission fulfilment planning and evaluation process exists. The PESTE acronym represents political, economic, sociocultural, technological, and environmental factors.

Political

External accountability frameworks dominate the discourse and drive institutional planning. As a publicly funded institution, Sage is required to assure that its activities are an effective use of taxpayers’ resources. Sage is both accountable to the provincial government, as well as its American accreditor. As such, Sage is beholden to political pressures. The *BC Accountability Framework* and accreditor’s *Standards for Accreditation* are complex and contain a multitude of problem representations informed by a neoliberal worldview, such as individualism, merit, and a consumerist value-system, which

dominate how quality assurance processes are perceived and understood. To align institutional priorities with external accountability frameworks, I must explore how quality is represented in this discourse, how application of the standards impacts the university community, and problematize the assumptions defining institutional effectiveness.

Sage is responsible for responding to the Truth and Reconciliation Commission of Canada's (2015) *Calls to Action*; however, its performance measurement system, like other publicly funded organizations in North America, is profoundly Eurocentric (Crazy Bull, 2015; Anderson & Smylie, 2009) and imposing these governance models is oppositional to intercultural approaches. Therefore, I must be cognizant of upholding a system that has a legacy of cultural imperialism and colonialism, and consider cultural accommodations. This is necessary because aggregated numbers suppress marginalized voices (Almeida, 2017; Clemens & Tierney, 2017; Frost & Nolas, 2013; LaFrance et al., 2012).

Western evaluation practices are characterized by linear, hierarchical thinking. Despite widespread use of linear logic models, a process for identifying activities required to produce program outputs and outcomes (Rush & Ogborne, 1991), scholars advocate for culturally relevant and circular models, which are more effective at depicting interdependence of factors within a system (Thomas & Campbell, 2021). For example, culturally rooted metaphors and models that incorporate symbols reflective of cultural knowledge and worldviews are recommended as a more relevant model for some Indigenous populations (LaFrance et al., 2012).

Jenkins et al.'s (2015) adaptation of the medicine wheel demonstrated how one can extend the applicability of the logic model through a holistic approach. Alternatively, Frazier-Anderson et al. (2012) used a Sankofa bird to frame an Afrocentric logic model for implementing culturally-responsive evaluation in majority African American populations that prioritized contextual analysis with a cultural, sociopolitical emphasis throughout the evaluation process. In contrast, context and culture are absent in commonly used Western logic models.

Narratives and stories—central to some Indigenous communities’ ways of knowing—are also recommended as a method and means for understanding the lived experiences of university stakeholders, a concept which is often overlooked in Canadian postsecondary performance measurement. Story modeling, which involves listing all of the elements and their relationships (LaFrance & Nichols, 2009), can be a more culturally relevant way to communicate program outcomes.

Historically, standardized norms of educational performance have labelled Indigenous children in a deficit or viewed through a problem frame, by using such terms as *disadvantaged*, *vulnerable*, and *underperforming*. However, Western Eurocentric norms disregard the gifts, stories, and contributions of Indigenous learners (LaFrance et al., 2012). Alternate frameworks for performance measurement systems can be applied that are responsive to UNDRIP (UN General Assembly, 2007), which stressed Indigenous peoples’ rights to “participate in decision-making matters which would affect their rights... in accordance with their own procedures” (p. 16). Thus, to be responsive to UNDRIP, it behooves Sage to adopt methods for embedding culturally appropriate methodologies into its mission fulfilment planning and evaluation process.

Economic

Neoliberal trends inhibit a social justice orientation. Sage’s mission fulfilment planning and evaluation process is market-driven, which hinders attempts to understand the needs of the communities Sage serves because relevant data, such as student narratives that can provide context and radical analysis (Powell & Livingston, n.d.) are missing. However, rethinking performance measurement puts strain on Sage’s human resources. At Sage, there is a commonly held perception of a limited capacity to take on new initiatives, which makes change difficult. Encouraging staff to commit more time and effort risks resentment when additional financial support is not available.

Alternatively, Sage’s accreditor (2020) recently adopted new standards that require institutions to focus on equity and closure of opportunity gaps, and demonstrate compliance in this regard by

disaggregating student achievement indicators “by race, ethnicity, age, gender, socioeconomic status, first generation, and any other meaningful categories” (p. 13). Therefore, the revised standards offer the impetus for change. However, these changes do not go far enough because, without qualitative research, the interpretation of quantitative results are simply speculative and have the potential to contribute to policy nonsense.

Sociocultural

Cultural norms of passive engagement and low sense of agency contribute to discontentment with quality assurance. At present, four university committees oversee the determination of performance measures as part of the university’s mission fulfilment planning and evaluation process; however, cultural norms limit the committees’ capacity to develop more culturally-responsive measures. Committee culture is, in large part, the crux of this problem of practice due to transactional, hierarchical decision-making, and misaligned resource allocation. Furthermore, passive engagement and low sense of agency contribute to discontentment with quality assurance processes.

In order to understand the university committee culture and Sage’s mission fulfilment planning and evaluation process, Schein and Schein’s (2017) three levels of culture (artifacts/symbols, espoused beliefs and values, and basic underlying assumptions) provides a useful diagnostic tool. Similarly, Scott’s (2013) three mechanisms that have potential to influence organizational culture (cultural-cognitive scripts, normative standards, or regulatory rules) can be used to assess behaviours negatively impacting the adoption of contextualized performance measures. As shown in Table 1, an industrialization of educational language, such as students as customers, and curriculum is delivered, has framed quality assurance discourse so that templates influence reporting outcomes (Kim, 2018). Furthermore, despite historically rooted traditions of collegial governance, bureaucratic environmental drivers of externally imposed performance measures and accountability frameworks, perpetuate an accountability agenda and detract from processes that support improvement (Kim, 2018; Lambert et al., 2016; Sporn, 2006).

Table 1*Observable Evidence of Committee Culture*

Cultural dimensions	Mechanisms	Observable evidence
Artifacts/symbols	Cultural-cognitive scripts	Standards, policies, and templates limit how the problem is viewed; industrialization of educational language; copious amounts of data and lengthy jargon-heavy reports
Espoused beliefs and values	Regulatory rules	Performance data is used primarily for accountability purposes; capacity relies on special funding and staffing; predetermined objectives based on external standards; limited one-way flow of information
Basic underlying assumptions	Normative standards	Between reporting cycles, little thought is given to continuously gathering and analyzing data, and reflecting on results; employees do not have positive attitudes towards performance measurement and associate it with a bureaucratic burden; norms of compliance and low sense of agency

Evidence demonstrates that faculty and staff are disenchanted with quality assurance processes at Sage, which aligns with discontentment internationally with said processes (Cardoso et al., 2018; Naidoo, 2013; Yingqiang & Yongjian, 2016). As part of a constructivist mixed methods research project, a colleague and I investigated perceptions related to quality assurance, including cultural dimensions of North American accredited institutions that impact processes for measuring institutional effectiveness (Hoare & Goad, 2020). The findings showed that faculty and staff are disillusioned by the current framework for conducting quality assurance. For example, a dean at a two-year public institution lamented, “Accreditation serves as the stick... It does not really square with trust. A challenge is how to emphasize improvement” (Hoare & Goad, 2020, p. 2). Similarly, an accreditation liaison officer at a four-year private institution observed, “some faculty view it as regulatory and control” (Hoare & Goad, 2020, p. 2). Several faculty members cited accreditation as a threat or scary, and a provost at a tribal college went so far as to call accreditation a cultural imposition (Hoare & Goad, 2020). These sentiments are shared by many faculty and staff at Sage, which negatively impacts their level of engagement.

Psychological factors influence how quality assurance processes are subjectively and emotionally experienced at Sage. Interestingly, whether people eagerly or passively engage, or covertly or overtly resist quality assurance processes has been linked to how the processes are framed (Ewell, 2009). Not surprisingly, that sentiment was shared by participants we interviewed and surveyed (Hoare

& Goad, 2020). For example, a faculty member at a four-year public institution “felt pressure when accreditation was associated with compliance” (Hoare & Goad, 2020, p. 3). Similarly, an institutional research staff person at a four-year public institution “witnessed resistance when it was associated with bureaucracy” (Hoare & Goad, 2020, p. 3), a common refrain that can be overhead at Sage, as well.

Technological

There are numerous examples of faculty, staff, and students engaging in culturally-responsive research at Sage; however, qualitative research is conducted on an ad hoc basis and is not integrated into mission fulfilment planning and evaluation. Fortunately, the committees can draw upon internal expertise through the offices of institutional research, research and graduate studies, and quality assurance. Furthermore, appropriate technology, such as statistical software for qualitative data analysis and online survey creation are also available to the committees. Unfortunately, in times of resource constraints, qualitative analysis is perceived as a luxury rather than a necessity (Thomas & Campbell, 2021). Convincing the institution of the return on investment of contextualized performance measures requires strong internal advocacy and senior leadership buy-in (Schneider & Peek, 2018).

Environmental

Finally, a more pragmatic reason, in 2019, Sage received a recommendation from its accreditor to continue improvement of performance indicators and thresholds to better align assessment of those parameters with the strategic priorities and mission of the university. In addition, the accreditor encouraged the university to include some qualitative measures, particularly to address priorities related to intercultural understanding. While the university remains in compliance with the accreditor’s standards, it was noted that this was an area in need of improvement and thus the university is required to follow-up with an addendum detailing its plans for addressing the recommendation for the mid-cycle review in Spring 2022.

Political, economic, sociocultural, and technological factors act as barriers to improvement;

however, promising shifts in the environment set Sage up for a successful transition to a more culturally-responsive performance measurement process. With a better understanding of the internal and external factors framing the problem of practice and *why* change is required, I will shift the query to *how* to go about change. The following paragraphs discuss questions emerging from the problem of practice.

Guiding Questions Emerging from Problem of Practice

This organizational improvement plan aims to move beyond commonly used quantitative measures to more culturally-responsive measures of institutional effectiveness and student success. The central premise for this call to action is my philosophical belief that the methods used to study a phenomenon either expand or constrain our understanding of it and, consequently, shape our ability to respond appropriately. For example, when lamenting a noticeable drop in retention rate amongst Sage's Indigenous and rural learners in 2017, I was reminded by a colleague of the negative impact the summer wildfires had on rural communities and the resulting disruption of students' stable learning environment with the temporary closure of Sage's rural campus. Without this contextual information, Sage may have implemented mandatory remedial programs with deleterious results.

Unless Sage adopts new methodological approaches to measuring performance it is unlikely to generate the knowledge and wisdom needed to understand the needs of the regional communities and cultures the university serves. As such, the first guiding question emerging from this problem of practice is: (1) How can quality assurance practitioners support postsecondary institutions with the adoption of qualitative performance measures for assessing institutional effectiveness?

It behooves postsecondary education leaders to prioritize context and culture when defining and assessing performance. Yet, political and postsecondary education leaders' overreliance on quantitative measures promotes a dependency upon decontextualized input and output metrics (Chalmers, 2008) and can "propagate a colonial approach to research through the prioritization and

erasure of numbers over stories” (BC Office of the Human Rights Commissioner, 2020, p. 23), which detracts from Sage’s goal of honouring the distinct cultural institutions of Indigenous peoples. To better understand the potential barriers to adopting culturally-responsive processes, the second guiding question is: (2) What leadership strategies facilitate continuous quality improvement in a culturally diverse environment?

A myth of efficiency drives an overreliance on available and easily digestible numbers. Postsecondary institutions operate within a financially-constrained environment and are constantly required to justify their worth. A postpositivist orientation is validated through a neoliberal agenda that drives an external market orientation. To remain viable in a neoliberal environment, institutions compete for higher placements on rankings and use simplistic measures of success, such as aggregated retention and graduation rates. To address this issue, the third question is: (3) How can culturally appropriate performance measures and diverse evaluation methodologies be systemized using limited institutional resources?

As an inclusive leader, I am cognizant of the Canadian legacy of colonialism and question the cultural congruency between Sage’s performance measurement system and the local context. I seek to understand the organizational dimensions needed to develop a contextualized approach to performance measurement. In the next section, I will begin to describe a theory of action model for adapting Sage’s mission fulfilment planning and evaluation process to embed elements of the local context and cultures.

Leadership-Focused Vision for Change

The aim of this organizational improvement plan is to map a process for developing contextualized performance measures that provide actionable information for improving student outcomes as part of an overarching institutional priority to be responsive to culturally diverse ways of assessing performance. What follows is an interrogation of the current and desired organizational state and potential change drivers.

Current Organizational State

Two paradigms of assessment (Ewell, 2009) create tension for Sage's constituents: accountability and improvement. Accountability assessments are summative and judgmental for external, compliance purposes (Ewell, 2009) and are used to demonstrate and communicate performance of mission fulfilment (Ewell, 1987). As a publicly funded institution, Sage must provide evidence of institutional effectiveness and student success through annual reporting requirements to the provincial government. Accountability measures are typically standardized, quantitative, and comparative or fixed standard (Ewell, 2009), which is in line with provincial accountability measures (Appendix B). As such, communication methods are generally oriented for political or public consumption, such as easily digestible, aggregated, and generalizable data sets (Busch, 2014; Shavelson, 2009). In contrast, the improvement paradigm is formative for internal use and informed predominantly by an engagement ethos (Ewell, 2009). Improvement-oriented methods of assessment include multiple triangulated means, both quantitative and qualitative, tracked over time (Kuh et al., 2015).

The present state of Sage's organizational culture is influenced by Western evaluation systems (Anderson, 2020) and informed by neoliberal logics (Bozheva, 2019; Cowin, 2017; Robson, 2019), which have resulted in a quantification bias. As a result, there is a decoupling from those who make decisions (political leaders and senior leadership), those who are responsible for implementing the decisions (faculty and staff), and those impacted by the decisions (students and community members).

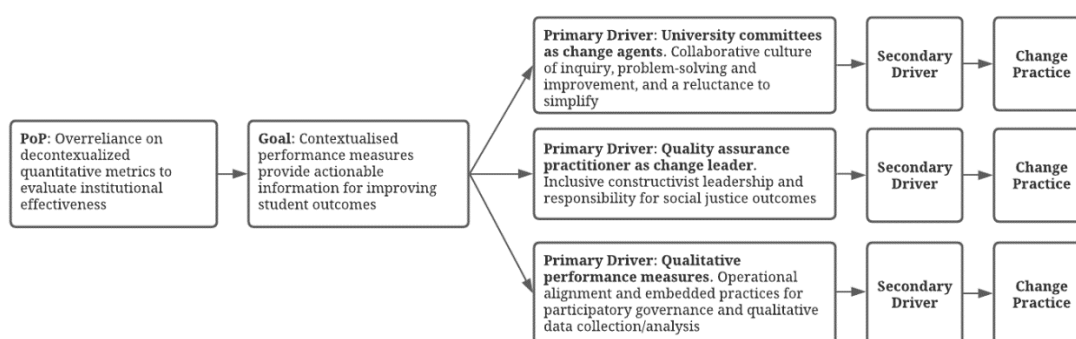
Desired Organizational State

The envisioned future state is oriented towards inclusion and community-mindedness—key values of the university—and incorporates holistic quality assurance approaches for authentic, contextualized performance measurement. I aim to widen the methodological imagination (Fine, 2017) in terms of Canadian postsecondary performance measurement by engaging with the local expertise of members of the communities Sage serves.

Figure 2 details the beginning stages of a theory of action model for culturally-responsive postsecondary performance measurement that incorporates purposeful attention to the sociohistorical elements of culture in planning and evaluation practices and includes culturally relevant measures that are derived from community-defined values (DeLancey, 2020). In Chapter 2, I will expand further upon the model. The vision prioritizes inclusive evaluation practices and meaningful partnerships.

Figure 2

Leadership-focused Vision for Change



An intercultural approach to performance measurement is aimed at creating space for multiple cultural histories, creative practices, worldviews, and the perspectives of various social groups in a given system. While Figure 2 is a static graphic, the model is intended to be dynamic to reflect that change is a continuous process rather than episodic. This acknowledges that culturally-responsive performance measurement is an ongoing process that requires constant attention.

My lived experiences and extant research revealed five guiding principles for culturally-responsive postsecondary performance measurement (Table 2). Synthesizing knowledge based on lessons that are evidence-based is recommended as the optimal way to derive principles (Patton, 2015, 2018; Rosch, 1999). These principles (Table 2), which I refer to as PEAQC (pronounced *peak* as in performance; or, *pique* as in one's curiosity), underpin the change effort. The principles build upon the key concepts of culturally-responsive evaluation and research (Hood et al., 2015; Trainor & Bal, 2014), yet are designed to meet the unique needs of Sage's context and cultures. Woven throughout is the

need for cultural competency of the evaluation committees, particularly the quality assurance practitioner. Cultural competency requires self-awareness, cultural humility, empathy, listening, relationship building, and respectful engagement with diverse others (American Evaluation Association, 2011; Pusch, 2009).

Table 2

Principles of Culturally-Responsive Performance Measurement

Ω	Effectiveness principle	Outcome
P	Participatory: data is meaningful when defined by the user.	Evaluation committees consist of culturally diverse academic peers and stakeholders with cultural competence.
E	Emergent: a contextualized approach is often emergent with generous time-frames.	Evaluation windows for qualitative methodologies allow for longitudinal studies and extended reporting cycles.
A	Appreciative: culturally-responsive interpretation and communication of research results builds on learners' strengths.	Evaluation committees use anti-deficit/strengths-based approaches, are attentive to relationships, and are aware of insider-outsider complexity.
Q	Qualitative: performance indicators are most reliable and valid when assessed as a collection of diverse data sets.	Evidence portfolios include both quantitative and qualitative measures.
C	Catalytic: effective evaluation processes lead to improvement through action.	Inquiry leads to action and informs programming that supports student success.

Clarity of roles and responsibilities within the university committees is required to operationalize the PEAQC Principles. By reducing uncertainty and providing a container for dialogue, I can create the necessary psychological safety (Schein & Schein, 2017) required for the change. Shifting to a collaborative culture and embedding practices for participatory governance and qualitative evaluation into operations will support achievement of the vision.

Change Drivers

Three change drivers can put pressure on the system to contextualize performance measurement at Sage: qualitative performance measures, quality assurance practitioner as change leader, and university committees as change agents.

Qualitative Performance Measures

Mobilizing data has been identified as a powerful strategy for organizational improvement (Fullan & Gallagher, 2020), a key element for successful reform, and can offer organizations a competitive advantage (Pfeffer & Sutton, 2006). Data and feedback are key characteristics of effective

teams (Hall & Hord, 2015). Furthermore, research has shown that theory based on generalized metrics, such as family income, are inappropriate for measuring Indigenous student success (Tierney, 1992). In addition, Thomas and Campbell (2021) reasoned that social justice measures “look at issues of opportunity, equity, and fair access” (p. 291). Therefore, the primary driver for culturally-responsive, contextualized mission fulfilment planning and evaluation is the identification of qualitative performance measures.

Unfortunately, the provincial government venerates generalizability, which limits the indicators selected to measure student success by prioritizing aggregate numbers as a means to compare institutions. Scholars caution that generalizability should not be the aim of performance measurement systems, citing negligence as an outcome of seeking averages as students’ experiences, regardless of race and ethnicity, are not homogenous (Hamshire et al., 2017).

The benefit of qualitative methods for supporting students is evident throughout the literature on student success. For example, Harper’s (2007) use of qualitative methods to assess the trajectory of 219 black male undergraduate students through college provided evidence of how these students were able to overcome barriers that typically disadvantage their peers. McCormack et al.’s (2017) meta-analysis of small-scale qualitative studies showed how time-to-completion is an unhelpful metric for students in good standing at City University of New York. Hughes (2000) demonstrated the value of a portfolio of indicators for measuring student success, such as: positive student-teacher interactions, increased student self-esteem, and improved attitudes about schooling. These studies and others detailed in Appendix E offer guidance for improving Sage’s mission fulfilment process.

Change Leader and Change Agents

To create a collaborative culture requires change agents and a leader to facilitate inquiry and dialogue. Structurally, Sage has many of the elements in place to facilitate participatory governance and thereby empower faculty, staff, and students to be change agents. However, a culture of passive

engagement and dependency upon senior leadership to make decisions is a barrier to meeting one of the principles of culturally-responsive performance measurement: data is meaningful when defined by the user. This lack of engagement may be a result of Sage's community college roots when it lacked the institutional autonomy and powers of the Senate that it now maintains as a university (Barnsley & Sparks, 2009).

Sage's governance structure is designed to be inclusive and incorporates numerous touchpoints to ensure institutional goals are widely distributed, discussed, and analyzed. However, a common challenge in the governance of Canadian universities is "role confusion... power imbalance... [and committees] rubber-stamping decisions made by senior administration" (Pennock et al., 2016, p. 77). Building the leadership capacity of the committees is a priority for addressing this problem of practice. It is my responsibility to provide training and advocate for resources that will support the committees in fulfilling their mandate. Empowering committee members as change agents requires my commitment to inclusion and diversity. An analysis of Sage and its committees' readiness for change is discussed below.

Organizational Change Readiness

Change readiness refers to Sage's collective capacity and willingness to adopt the change effort. Presently, university stakeholders are comfortable with the status quo regarding the use of quantitative measures to meet external accountability requirements. However, Sage's recent adoption of a new vision and the accreditor's recommendation to develop qualitative performance measures may provide the necessary stimulus for disconfirmation (Schein & Schein, 2017), the realization that existing processes do not provide actionable information to improve student outcomes.

An organizational change readiness tool that addresses common conceptions of change readiness in the field of education is Hall and Hord's (1979, 2018) Concerns Based Adoption Model (CBAM). The model is useful for assessing and predicting the concerns and behaviours of individuals and groups throughout the change process, and is predicated on the belief that change, learning, and

improvement are interdependent constructs (Hord & Roussin, 2013). CBAM was developed based on the assumption that change is implemented by individuals, thus organizations will not change unless individuals change first (Howley, 2012). The CBAM diagnostic tools can be applied to groups and are useful for assessing the change readiness of Sage's four committees responsible for mission fulfilment planning and evaluation. What follows is an analysis of Sage's readiness for change using Hord and Roussin's (2013) five *Readiness for Change* dimensions and associated indicators: relevance and meaning, consensus and ownership, scope and culture, structure and coherence, and focus, attention, and letting go.

Relevance and Meaning

Implementing change with the committees requires that individuals understand and value the logic behind the change. University stakeholders are inherently skeptical, particularly concerning ideas of quality; therefore, change leaders should anticipate a critical response from those affected (Stensaker et al., 2015). Accordingly, readiness for change is evident when there is a compelling and logical rationale for the change and the benefits of the innovation are accepted by those responsible for implementing it (Hord & Roussin, 2013). Buy-in requires the engagement of individuals in the decision-making process, particularly in *how* implementation will occur (Howley, 2012). The internal and external factors described previously, such as a political focus on the Truth and Reconciliation Commission of Canada's (2015) *Calls to Action* and environmental factors associated with the accreditor's recommendation to adopt more meaningful measures, provide sufficient relevance and meaning for this change effort.

Furthermore, ample evidence in the literature justifies the need for more culturally-responsive postsecondary performance measurement, thus offering Sage the opportunity to be at the forefront of socially just change. Moreover, there is anecdotal evidence from faculty, students, and staff expressing the need for change. For example, the Senate Intercultural Understanding Committee chair

acknowledged that the indicators are input-driven and do not capture the multivariate impacts of global programming and intercultural learning at Sage. As a result, the committee revised its terms of reference to include the mandate to advise Senate on methods for culturally-responsive performance measurement. The revisions embed the change effort into the organization's governance framework and ensure committee commitment.

A similar sentiment was shared by the Senate Student Success Committee (2020) in its annual report: "Quantitative metrics may not provide enough information to stimulate dialogue and tell us what [Sage] needs to do next" (p. 6). Both instances provide evidence that committee members have had the opportunity to contemplate the relevance of this change. Moreover, this change is not being driven by a crisis mindset, but rather a desire to learn and improve. While there is acknowledgement of a need for change, the committees face challenges in their attempt to develop and track qualitative measures due to insufficient resources and know-how.

Consensus and Ownership

Consensus and ownership refer to the level of engagement of committee members, their ownership over the change initiative, and the engagement of senior leadership. Leadership is seen as essential to sustainable success (Hall & Hord, 2015). This achieves two ends: (1) it lends credibility, and (2) it ensures sufficient resources are allocated to the change effort. Sage's senior leadership are committed to continuous quality improvement, which is evidenced by resourcing the committees with the quality assurance practitioner. However, culturally-responsive performance measurement is a collective effort (LaFrance & Nichols, 2010; Rainie & Stull, 2016; Vettori, 2012); therefore, one individual cannot successfully implement this change. Effective group decision-making and social processes are required for change readiness.

The four committees are at different levels of maturity in terms of their understanding and level of use (Hall & Hord, 2015), which refers to the behaviors of individuals in relation to the mission

fulfilment planning and evaluation process (Table 3). However, two committees are beginning to attend to the impact of the process and consider variations for improvement. For example, one initiative that shows promise towards adopting contextualized performance measures is being piloted by Sage's office of research and graduate studies, which is tightly connected to the Senate Research Committee. If the office can effectively integrate its research with the committee they could mature to level five.

Table 3

Levels of Committee Use of Mission Fulfilment Processes

Level of Use	Description of Committee Behaviour	Committee
0: Non-use	Little or no knowledge of the initiative; no attempt to learn.	
1: Orientation	Interest in the initiative; development of an opinion about its relevance.	
2: Preparation	Engagement with the initiative and active learning of committee roles and responsibilities.	Student Success; Sustainability
3: Mechanical	Focus on day-to-day use; not concerned with impact.	
4A: Routine	Confidence in using the process, which is now habitual; little thought is given to its impact.	
4B: Refinement	Attention turns to the impact of the initiative; attempts to vary implementation in order to improve it.	Intercultural Understanding; Research
5: Integration	Collaboration across committees and with staff external to the committees.	
6: Renewal	Reflection on effectiveness of the process; consideration of major revisions for greater impact.	

Note. Table 3 is adapted from the work of Hall and Hord (2015) in *Implementing Change: Patterns, Principles, and Potholes*.

The office of research and graduate studies' pilot aims to qualitatively measure knowledge building pathways using cultural mapping techniques to assess community partnerships. Cultural mapping as a tool has the capacity to document cultural values and traditions, and representations of meaning of place (Duxbury et al., 2015). This pilot project demonstrates that staff are willing to commit time and energy towards experimenting with difficult to measure sources of intangible value. Unfortunately, there is a lack of integration across institutional silos and the Senate committees are not equitably resourced; therefore, replicating a similar approach across committees requires collaboration and creativity.

Hall and Roussin (2013) cited trust as measure of change readiness; however, the relationship between academics and quality assurance is troubled. Hoare and Goad (2020) discovered that trust is

commonly associated with a positive sentiment when quality assurance is presented in a context of improvement, collaboration, communication, learning, and development. In contrast, faculty and administration feel distrust when quality assurance is associated with siloes, overloaded faculty, regulation, and control (Hoare & Goad, 2020). These sentiments are echoed at Sage as neoliberal trends dominate the perception of a limited capacity to take on more work. Furthermore, when the mission fulfilment planning and evaluation process is perceived as driven by compliance, committee members resist participating.

Dziminska et al.'s (2018) research reflected a similar story of trust and its associated inhibitors and identified key drivers of change, such as avoiding excessive bureaucracy, transparency, user-friendly systems, and a partnership approach that leads to empowerment of participants. Given that the university committees gained ownership of mission fulfilment planning and evaluation in 2018, the relative newness and low levels of use (Table 3), contribute to a weak sense of agency and deference to authority (Weick, 2016). Therefore, change requires unlearning and relearning (Schein & Schein, 2017) of cultural and behavioural norms.

Scope and Culture

A common conception of change readiness is that change must be congruent with users' worldviews (Howley, 2012). The scope and culture dimension assesses whether the proposed change is sensitive to the organizational culture and the individuals responsible for implementing the change. This includes assessing if the change will fit within the current workload of staff. While there are numerous examples of faculty, staff, and students engaging in culturally-responsive research at Sage, it is currently conducted on an ad hoc basis and is not integrated with the mission fulfilment planning and evaluation process. As such, attempting to rely on current practices poses challenges due to replicability and sustainability.

In terms of organizational culture, Sage strives to “earn recognition as the most committed and innovative university in Canada [...] for involving graduate students in community-centred research; and, for undergraduate research training” (Sage, 2020, p. 2). Therefore, engaging students as co-creators of knowledge in mission fulfilment planning and evaluation holds promise as an exciting innovation that aligns with Sage’s vision and provides evidence that Sage is ready for this change.

Structure and Coherence

The structure and coherence dimension assesses whether an organization has the structural mechanisms in place for the change including the appropriate roles and responsibilities for the change effort. At Sage, four Senate committees are mandated to develop and monitor measures of institutional effectiveness and student success. The committee chairs are members of the Accreditation Steering Committee, which is representative of senior leaders across the organization and responsible for assuring that Sage complies with the accreditor’s standards. Therefore, Sage has many of the structural ingredients necessary for change. For example, there are frequent opportunities for dialogue as committees meet monthly. In addition, an executive group comprised of the Senate committee chairs, key institutional leaders, and the quality assurance practitioner meet every second month to discuss ways to improve the mission fulfilment planning and evaluation process. Frequent interaction facilitates collective-sense-making (Weick, 2005) and the construction of shared understanding (Lambert et al., 2016), which presents an opportunity to share resources and strengthen leadership capacity (Schein & Schein, 2019).

Focus, Attention, and Letting Go

The final dimension focuses on past initiatives or practices that can be let go to make room for change, which is important as resource constraints are noted as a potential barrier to success. Committees frequently discuss the validity of existing measures. For example, the Senate Intercultural Understanding Committee, one of the most mature committees in terms of levels of use, has identified

quantitative measures, such as the number of people attending events, that could be replaced with asset mapping techniques (Kretzmann, 1993). Asset mapping can help create a more fulsome picture of Sage's achievements in fostering intercultural understanding by documenting initiatives that demonstrate depth, scope, and reach of intercultural understanding. Furthermore, asset-based methodologies can identify the capital and knowledges gained from communal and familial experiences—the community cultural wealth (Gonzalez, 2017)—as a means to validate unrecognized assets of marginalized groups (Cleary & Wozniak, 2013; Edwards, 1993; Yosso, 2006;). While committee members are uncertain as to how the change will occur, there is consensus that contextualized measures are necessary.

The committees can draw upon internal expertise through the offices of institutional research, research and graduate studies, and quality assurance. Appropriate technology, such as statistical software for qualitative data analysis and online survey creation are also available to the committees. Therefore, Sage is well-situated structurally to respond to this change; however, cultural and resource constraints will need to be addressed in order to move forward.

Summary

Chapter 1 introduced limitations to Sage's performance measurement system and detailed why change is necessary. The university is primed for change given its collegial governance structure. I will need to be cognizant of the macro-cultural influences and the organizational culture, which have the ability to hinder the change effort. Evidence of a post-neoliberal future with a social justice orientation suggests that this is a timely and welcome discussion in Canadian postsecondary education. Chapter 2 will explore my approach to leading change and propose potential solutions as part of a framework for leading the change process. Chapter 3 will discuss implementing, evaluating, and communicating the change effort.

Chapter 2: Planning and Development

The problem of practice investigated in this metaevaluation is an overreliance on decontextualized quantitative performance measures to evaluate institutional effectiveness and student success at a Western Canadian university. The goal of this plan is to map out a theory of action model for developing contextualized performance measures that provide actionable information to improve student outcomes. As an inclusive and constructivist leader, I assume that change is a social, collective process requiring ongoing reflection and incremental refinement. As such, my lens for viewing the problem follows an interpretivist cultural philosophy.

In Chapter 1, I argued that culturally-responsive approaches to mission fulfilment planning and evaluation necessitate equitable and participatory processes. In Chapter 2, I describe the leadership approaches and change management framework designed to address this problem of practice. In addition, several solutions for addressing the problem will be explored. Finally, I will interrogate ethical leadership practices and assumptions as they pertain to Sage's organizational context. In particular, I will argue how an ethic of community (Furman, 2004) can support Sage's vision of providing a place of belonging for all learners.

Leadership Approaches to Change

The primary change agents for resolving this problem of practice are the four university committees responsible for mission fulfilment planning and evaluation at Sage. As the person assigned by senior leadership to facilitate the process, I am perfectly situated to lead from the middle. Considering Sage's governance structure (Figure 1, Chapter 1), I must be mindful to select leadership approaches that draw the greatest potential out of teams of people.

Historical approaches of collegial governance and the university's commitment to open governance, demonstrate that Sage has the cultural foundation to support an internal orientation of shared leadership, an approach that has been consistently associated with positive team performance

and institutional effectiveness (Jones et al., 2012; Kezar & Holcombe, 2017). Furthermore, an inclusive leadership model of governance has been identified as one of the best practices to support equity, diversity, and inclusion in Canadian postsecondary institutions (Shaibah, 2020). Thus, Sage has an ideal cultural foundation for participatory governance.

Table 4 summarizes inclusive (Cox, 2020; Helgesen, 2005; Wasserman, 2015) and constructivist (Lambert et al., 2016) leadership practices that will facilitate a transition from the current state to the envisioned future state.

Table 4

Quality Assurance Practitioner's Leadership Approach

Current state	Leadership approach	Envisioned future state
Normative behaviours: minimal contribution, fulfilling a service requirement, coming unprepared, sporadic attendance, distracted/late, not volunteering for additional information or effort	QA practitioner models inclusive and constructivist leadership (e.g., leader is authentic, models a <i>growth mindset</i> (Dweck, 2006), asks questions and is willing to make mistakes, is explicit about personal biases and assumptions)	Active engagement: committee members come prepared to meetings, consistently contribute to dialogue, collaborate with others, take on additional tasks, continue dialogue outside of the committee
Perception of a limited capacity for additional work	Institution creates a <i>container</i> (time and space where normal business practices are suspended and dialogue can take place)	Committee members believe they have the capacity to do the work
Hierarchy in the committee	QA practitioner practices <i>values-based inclusive leadership</i> and regularly reminds committee members of university's vision, values, and strategic change goals	Committee members feel professionally and/or personally interested/motivated
Political pressure	QA practitioner shares power and authority by providing equal access to information and decision-making, allows committees to pursue their own objectives	Collegial climate that encourages all members to participate
Short-term thinking; reactive; uncertainty of authority/responsibility	Institution invests in professional learning opportunities for committees and opportunities for cross-committee collaboration	Strategic; proactive
Largely unidirectional and transactional, in part due to confines of Robert's Rules	QA practitioner recognizes when marginalized voices are silenced; creates space for other voices to be heard; practices deep listening	Dialogic and reciprocal processes support democratic participation
Membership is largely drawn from positional authority therefore there is no mechanism to ensure equity and diversity	QA practitioner is aware of the cultural orientations of committee members and calls attention to gaps in representation	Membership is representative of the institutional community and there is a diversity of opinions
Uncertainty of authority, clear mandate/responsibility	QA practitioner clarifies roles and responsibilities and, if necessary, proposes changes to committee terms of reference and reporting templates	Chair ensures meetings and committee run effectively
University committees are too large for effective group decision-making	QA practitioner proposes the establishment of working groups; collaboratively establishes terms of reference and meeting standards	Working groups representative of larger committees facilitate inquiry and dialogue

Note. Data for *Current State* and *Envisioned Future State* are drawn from organizational citizenship behaviour theory and principles of effective academic governance (Lougheed & Pidgeon, 2016), in addition to my personal experiences working with and observing Sage's committee culture for the past six years.

What follows is a discussion on the merits of using principles of inclusive and constructivist leadership to resolve this problem of practice.

Inclusive Leadership

Wasserman (2015) defined inclusive leadership as the collective capacity "for relational practice, collaboration, building inclusion for others, creating inclusive workplaces, and work cultures, partnerships and consensus building " (p. 335). My understanding of inclusive leadership follows Cox (2020) who described inclusive leadership as a form of distributed leadership. Effective application of inclusive leadership requires leaders to define *inclusion* in context (Ferdman, 2014) and recognize that, historically, inclusion has been defined based on a western-centric frame, which prioritized the comfort of the dominant group at the expense of marginalized communities (England & Brown, 2001). Adopting an inclusive lens is helpful because, as a member of the four university committees, I am well positioned to observe whose voices are underrepresented. I am keenly aware that the university committees' membership is largely drawn from positional authority; therefore, there is no mechanism to ensure equity and diversity. As an inclusive leader, I must create space for other voices to be heard, either by recommending revisions to committee terms of reference or establishing working groups with broader representation.

Inclusive leadership has a multiplying effect. Research has shown that experiences of inclusion stimulate one's desire to be more inclusive (Cox, 2020), thereby satisfying a need for sense of belonging. Therefore, by practicing inclusive leadership in smaller working groups, I have potential to help Sage realize its vision of providing a place of belonging for all members of the community.

Many committee members maintain that they have limited capacity for additional work. However, across the four committees, members collectively contribute thousands of hours of service (Appendix D). Unfortunately, largely unidirectional and transactional communication strategies prevail, which limits the committees' capacity to engage in critical inquiry and dialogue. This can be attributed,

in part, to the constraints of *Robert's Rules of Order* (Corbin, 2020), which was developed under the assumption that a productive committee meeting is orderly. However, now we know that effective meetings encourage diverse opinions (Dubb, 2020), which can often be a messy process.

Resolving this problem of practice requires that committee members believe they have the capacity to do the work. Therefore, I need to create *containers* (Isaacs, 1999) for dialogic groups. Containers are designated time and space for dialogue, where assumptions and judgements are suspended, and generative conversations occur (Bushe, 2020). I can facilitate this by advocating for a portion of meetings to be set aside for committee of the whole (Robert, 2020), where rules are relaxed and open dialogue can occur, or by establishing working groups that are not constrained by formal processes.

Dialogue is the main activity of inclusive leadership (Cox, 2020) and is the antithesis of unidirectional, hierarchical committee norms. Translated into practice, dialogue is observed as listening to everyone's opinions, suspending assumptions and social hierarchies, "sharing a common content" (Bohm, 1996/2013, p. 30), and humanizing people as individuals rather than as objects in an organization. Inclusive leaders allow room for mistakes, difficult conversations, and sharing personal stories (Cox, 2020). However, I am mired by hierarchical committee structures in which the chair holds authority and controls the flow of meetings. In addition, the university committees are too large for effective group decision-making and often cascade into serial monologue (Fay et al., 2000), where a dominant speaker monopolizes the meeting.

Fortunately, each of the committees can establish working groups; therefore, I have agency to propose the establishment of such groups and create a container for inclusive leadership. Leading these smaller groups, I can draw upon Helgesen's (2005) principles for webs of inclusion as well as structures to incorporate long-term planning, and education and training. Webs are permanent fixtures of the organizational culture. Consequently, webs are able to maintain connections across levels, even as

membership changes and is reorganized, thereby expanding linkages and relationships beyond the confines of the group (Helgesen, 2005).

Another challenge I face when working with the university committees is, once annual reporting is complete, faculty and administrators resume their routine work without reflecting on results. In between reporting cycles, little thought is given to continuously gathering and analyzing data. This short-term, reactive thinking means employees do not have positive attitudes towards performance measurement and associate it with an episodic bureaucratic burden.

As an inclusive leader, I can soften this burden by prioritizing ethics and authenticity. For example, Gehani and Maheshwari's (2020) values-based inclusive leadership, which drew inspiration from Mahatma Gandhi's legacy of uplifting lower-castes, engaging rural poor, and empowering women, focuses on "scripting, speaking your mind, and action planning" (p. 302). In short, it requires that I regularly remind committee members of our common purpose and shared vision. A simple approach to facilitate this involves creating a generative image (Bushe, 2013), a phrase that captures the core essence of the initiative and motivates stakeholders. The generative image can be crystalized as a header on all meeting agendas, referred to during formal and informal conversations, repeated by senior leaders, and reflected upon by members of the committees.

Constructivist Leadership

Constructivist leadership is defined as "fostering capacity through the complex, dynamic processes of purposeful, reciprocal learning" (Lambert et al., 2016, p. 10). A well-designed dynamic system, constructivist leadership includes: connection, communication, and collaboration. Scholars of constructivist leadership hold several assumptions: leadership is not trait theory; everyone has the right and responsibility to lead; leadership is a shared endeavor; and, power and authority should be distributed (Lambert et al., 2016). Constructivist leaders encourage shared decision-making, engage broader representation, and allow time for learning, individual and group reflection, and deep listening.

It is therefore a perfect antidote for existing committee norms of compliance and low sense of agency.

Commonly observable university committee norms at Sage include: political pressure, uncertainty of authority, carefully managed discussions, sporadic attendance, and distracted members. Thus, it requires that I seek out ways to facilitate dialogue so that committee members feel professionally and personally validated. Lambert (2009) offered a set of tools to facilitate dialogue that can be used to stimulate curiosity and included a list of questions grouped by the four reciprocal processes of constructivist leadership. For example, questions on evoking potential include: “What assumption can I infer from...? What information/evidence will I need to gather in order to challenge those assumptions” (Lambert, 2009, p. 116). Or, on sense-making: “What patterns do we see? What connections can we make?” (Lambert, 2009, p. 116). The university committees are responsible for analysing performance data, as such, Lambert’s questions are relevant for stimulating inquiry and interrogating assumptions about definitions of student success. Moreover, these questions may identify that insufficient data is available and inspire committee members to seek out innovative ways to problem solve.

Inclusive and constructivist leadership approaches can address the various dimensions of Sage’s committee culture. How I will apply these approaches to resolving the problem of practice will be discussed further in Chapter 3. In the next section I will map out the change management framework designed to leverage collective sense-making (Weick, 2005) and distributed cognition (Hutchins, 1995).

Framework for Leading the Change Process

A change management framework for culturally-responsive performance measurement must be adaptable to Sage’s organizational culture, facilitate continuous quality improvement, and follow an interpretive epistemology—the belief that reality is subjective and socially constructed. A model that meets these demands is Schein and Schein’s (2017) cycle of learning/change. The following section describes how dialogic organizational development (Bushe & Marshak, 2009), an emerging theory that

synthesizes principles underpinning the theoretical framework discussed in Chapter 1, and the cycle of learning/change will be used to address this problem of practice.

Dialogic Organizational Development Theory

Bushe and Marshak's (2009) theory of dialogic organizational development neatly packages the principles, practices, and type of change required for contextualizing Sage's mission fulfillment planning and evaluation process. Following an interpretive epistemology, it assumes reality and relationships are socially constructed, organizations are meaning-making systems, and knowledge is a communal construction (Bushe & Marshak, 2014). It further assumes that change is continuous and incremental, encompassing ongoing operational changes adaptable to the demands of the environment (By, 2005).

Postsecondary institutions are complex adaptive systems and adaptive change does not fit with linear processes (Bushe, 2020). Therefore, performance measurement systems should be designed to achieve exploration and discovery (Corrigan, 2018). As a constructivist leader, I can apply these epistemological assumptions to increase leadership capacity through reciprocal learning and problem-finding rather than imposing externally predetermined goals (Lambert et al., 2016).

Dialogic organization developers emphasize dialogic networks and immerse themselves within the change process. They assume that change processes are heterarchical and emergent and seek to increase differentiation, participation, and engagement before formalizing plans. Inclusive leaders hold complementary assumptions and abhor restricting access to information because the risk of creating a caste system that isolates people with non-positional leadership authority is high in organizations that limit information-sharing (Helgesen, 2005).

The scope of the change proposed in this organizational improvement plan is a "variation that occurs within a given system which itself remains unchanged" (Watzlawick et al., 1974, p. 10). The *system* is Sage's mission fulfillment planning and evaluation process. The *variation* refers to small-scale changes that build upon Sage's existing accountability frameworks without deconstructing the system or

creating radical change.

The change requires a paradigmatic shift from accountability to improvement thus necessitating stakeholders to unlearn entrenched values and beliefs about the way performance is measured, such as discarding colonial assumptions of rigour and expertise (Thomas & Campbell, 2021) and valuing quality and collaboration over quantity and expediency. My role as an inclusive leader is to create spaces for dialogue and decision-making, and to support and amplify diverse voices by immersing myself in the process and reflexively considering what narratives I may be privileging or marginalizing.

Cycle of Learning/Change

To determine the relevance of the cycle of learning/change, I must assess its fit for purpose, as a lack of congruency between change strategies and organizational culture can lead to cultural misunderstandings (Kezar & Eckel, 2015). Table 5 outlines the level of fit in relation to several criteria: my leadership lens (interpretivist cultural theory) and approaches (inclusive and constructivist), the organizational cultures, and the type of change (continuous).

Table 5

Fit Assessment between Sage and Cycle of Learning/Change

Criteria	Cycle of learning/change
Interpretivist epistemology	Applies <i>cognitive restructuring</i> to create new normative behaviours that are socially constructed.
Sensitivity to culture	Acknowledges psychological defenses may be embedded in the organizational culture.
Inclusive and constructivist leadership	Utilizes conversational processes to facilitate <i>cognitive restructuring</i> .
Improvement orientation	Advocates for <i>managed learning</i> as opposed to planned change.
Psychological dimensions	Acknowledges that change is a psychological dynamic process that includes painful unlearning and difficult relearning. Leaders must create psychological safety for individuals and groups.
Continuous	Assumes that learning involves continuous diagnosis and intervention.

Table 5 provides evidence of congruency between the model and criteria. What follows is a comparative analysis of the model with Lewin's (1947) three stage model of human change.

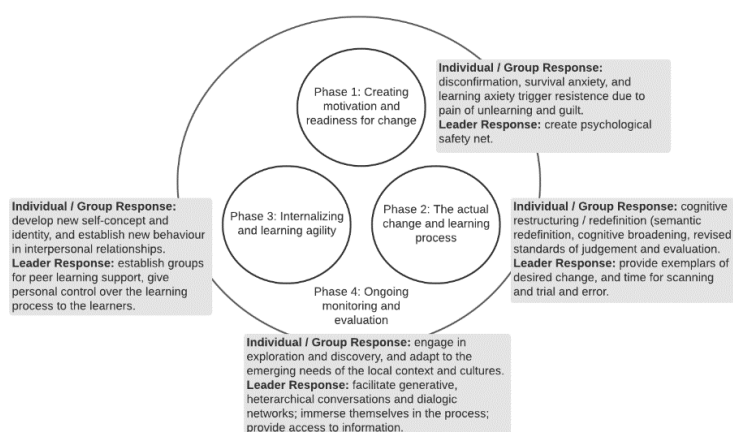
The cycle of learning/change builds on Lewin's (1947) three-stage model of human change, which involved unfreezing-change-refreezing. Lewin's theory prioritized psychological processes and

assumed that the most important dimension of change is the individual's personal experience (Graetz & Smith, 2010). Alternatively, the cycle of learning/change is framed from a cultural perspective where the most important dimension of change is the collective group experience and shared values. While Lewin's model considered group dynamics, particularly how behaviours are formed, it stopped short of the depth to which Schein and Schein (2017) considered the role of organizational culture (Burnes, 2004).

The beauty of Lewin's (1947) model lay in its simplicity. Linear, planned, episodic, ordered, and rational, it provided a foundation for organizational development scholars to build upon (Scherer et al., 2016). However, the change framework required for culturally-responsive performance measurement must be adaptive and continuous to reflect an evolving understanding of what the terms *equity*, *diversity*, *inclusion*, and *intercultural* mean for postsecondary institutions and the students they serve. Furthermore, Schein and Schein (2019) argued that "staged linear models of planned change [are] obsolete and irrelevant" (p. 95) in a dynamic context. Therefore, Lewin's planned change is inadequate. Instead, an adaptive, iterative model underpinned by cultural theory is necessary for change. Figure 3 graphically depicts the three phases of the cycle of learning/change. A fourth phase has been supplemented to the model to reflect the continuous, emergent nature of dialogic organizational development.

Figure 3

Cycle of Learning/Change



The cycle of learning/change (Figure 3) prioritized group processes thus making it an ideal model for facilitating change with Sage's four university committees.

Phase 1: Creating Motivation and Readiness for Change. The first phase is aimed at disrupting learned behaviour in order to create new cultural norms. This requires that individuals are internally motivated to change through *disconfirmation*, a profound sense of dissatisfaction with the present conditions (Schein, 1996). At Sage, disconfirmation is occurring as members of the university committees begin to realize the inadequacy of using quantitative measures to improve student outcomes, and to see the ways in which the dominant culture's preference for Western evaluation concepts—reductionist thinking, efficiency, classification, comparison, and ranking (Hall, 1992)—comes at the expense of more culturally-responsive methodologies. This realization motivates them to seek out more informative measures. However, before new learning can take place, some members of the committees must disconfirm their quantitative bias. Individuals are at different stages as some hold more firmly to this bias due to prior learning or lack of exposure to alternate methodologies. As a constructivist leader, I can address this by designing processes that facilitate connection, communication, and collaboration.

Anxiety or guilt can also be a motivating factor for change. Schein (1996) referred to this as survival anxiety, where individuals recognize that they must adapt or they will otherwise fail. Historical stagnation of retention and graduation rates at Sage offers some evidence that aggregated student outcomes data does not carry enough weight to motivate individuals to change; however, a recent examination of disaggregated data by Indigenous and rural learners has created sufficient anxiety amongst some stakeholders to seek out new approaches. In addition, institutional initiatives such as the establishment of an anti-racism taskforce and a commitment to decolonize the institution demonstrates an internal motivation to address equity issues. This suggests that individuals are interested in collecting contextualized data through culturally-responsive methodologies to enhance understanding of the root

causes of inequities.

The final motivating factor is learning anxiety, which can trigger defensiveness or resistance to change if feelings of incompetence or loss of identity are too strong (Schein, 1996). To overcome this, Schein and Schein (2017) recommended that leaders create a psychological safety net by addressing learning processes and providing resources. Schein and Schein identified eight conditions essential for creating psychological safety, such as a compelling vision and positive roles models. How these eight conditions can be leveraged to facilitate change to address this problem of practice will be discussed in more depth in the *Critical Organizational Analysis* section of this organizational improvement plan.

Phase 2: The Actual Change and Learning Process. Once the committees are sufficiently dissatisfied with Sage's current performance measures and are motivated to change, they must develop a clear definition of the ideal future state. Schein (1996) described this process as cognitive restructuring, which involved three subprocesses: semantic redefinition, cognitive broadening, and revised standards of evaluation and judgement.

Semantic redefinition refers to altering assumptions surrounding core values and beliefs. For example, when Sage assumes that academic excellence is based on individual merit then it can justify low retention and graduation rates because of its open access mandate. However, if Sage redefines academic excellence to consider systemic inequities, then it becomes responsible for addressing the systems that create opportunity gaps.

Cognitive broadening refers to expanding our interpretation of a concept. Sage's performance measurement system is profoundly Eurocentric. To move to a more culturally-responsive system, the university must be open to other epistemologies and methodologies because the patterns dominating the basic underlying assumptions of the organization can result in deleterious actions based on deficient, narrowly defined information. Multiple patterns are present in postsecondary education, such as consumer protection, educative, entrepreneurial, managerial, quality engineering (Vettori, 2018),

which impact the way quality assurance processes are framed and used, such as market aims over social justice, and accountability over improvement.

Finally, developing *revised standards of evaluation and judgement* refers to revisiting old measures of performance to ensure they align with the desired future state. A simple example is moving from aggregated to disaggregated data to examine trends by learner-type. A more complex example is collecting data that illuminates the root causes of inequities, such as conducting focus groups or interviews (Appendix E).

Phase 3: Internalizing and Learning Agility. The final phase involves making the change habitual. For this to occur, it is important that the new behaviour produce better results, otherwise the change may launch a new phase of disconfirmation. Two components are necessary for change to become permanent: (1) individuals develop a new identity (e.g., the university is not a meritocracy), and (2) new behaviours are established, practiced, and reaffirmed through interpersonal relationships. The latter of which can be accomplished through Sage's four university committees. As a constructivist leader, I can facilitate this by engaging the committees in repeated cooperative interactions (Pentland, 2014). In the following section, I will describe how concepts from Phases 1 and 2 (Figure 3), in conjunction with the change readiness findings discussed in Chapter 1, can be used to diagnose gaps and analyze needed changes to resolve this problem of practice.

Critical Organizational Analysis

In this section, I will analyze the *Organizational Change Readiness* findings from Chapter 1 using Schein and Schein's (2017) three processes for cognitive restructuring and eight essential conditions for creating psychological safety to diagnose needed changes. This analysis will focus on organizational components that have been identified as drivers for change: quality assurance practitioner as change leader, university committees as change agents, and qualitative performance measures. The following gap analysis will illuminate how the change drivers can facilitate a comprehensive resolution to the

problem of practice.

Conducting a gap analysis by combining Hall and Hord's (1970, 2015) Concerns Based Adoption Model (CBAM) with Schein and Schein's (2017) cycle of learning/change as outlined in the previous section, allows me to focus on two primary change drivers: individuals and groups. Both models draw from psychological and cultural theory. CBAM, which was used to assess change readiness in Chapter 1, was designed around the premise that change is implemented by individuals (Howley, 2012). In contrast, the cycle of learning/change was developed based on the assumption that learning and change are social processes where fruitful learning arises in conversation with others. Combining the two philosophies allows me to conduct a more robust gap analysis.

Table 6 summarizes the change readiness findings and identifies barriers and potential levers for change, which are categorized according to the three processes for cognitive restructuring and conditions necessary for creating psychological safety (Schein & Schein, 2017).

Table 6

Critical Organizational Analysis

Change readiness findings	Cognitive restructuring and conditions	Components
Barriers: quantitative/tunneling bias Levers: accreditor's recommendation; mission fulfilment planning is embedded in committee terms of reference; frequent opportunities for collaboration; QA practitioner as resource; culture of participative governance	Semantic Redefinition: compelling positive vision; remove barriers and build new supporting systems and structures	QA practitioner as change leader Committees as change agents
Barriers: lack of trust; committee norms of transactional, hierarchical leadership; passive engagement Levers: engagement of senior leadership	Cognitive Broadening: support groups where learning problems can be aired and discussed; involve the learner; professional development	QA practitioner as change leader Committees as change agents
Barriers: replicability and sustainability of qualitative research; uncertainty as to how the change will be implemented Levers: faculty engage in qualitative research; undergraduate student research and training is an institutional priority; qualitative data analysis software is available	New Standards of Judgement/Evaluation: provide resources; provide formal training; provide positive role models	QA practitioner as change leader Qualitative performance measures

In addition, Table 6 identifies numerous components, including the quality assurance practitioner, university committees, and performance measures that emerged from the *Organizational Change Readiness* (Chapter 1) findings as drivers for change. Their role in the change process will be further

explicated below.

Cognitive Restructuring and Conditions

As detailed in Table 6, Sage is currently on the precipice of disconfirmation, the realization that existing processes do not provide actionable information to improve student outcomes. However, external requirements from the provincial government neither support nor hinder advancement beyond the status quo, as Sage dutifully meets Ministry targets every year. While a recent recommendation from Sage's accreditor encouraged the university to adopt qualitative measures of institutional effectiveness, the selection of measures and the method of data collection remain within Sage's purview. Thus, the motivating forces for change are predominantly internal. Given this, the university committees and I have agency in determining the components of the organization to change; however, some components may be more resistant to change than others.

Semantic Redefinition

Semantic redefinition (Table 6) requires a shift in individual and group norms, including redefining roles, responsibilities, and identities of the university committees. At Sage, university committee members have a low sense of agency. Time is spent rubber-stamping decisions made by senior administration rather than engaging in critical inquiry and dialogue. This perception perpetuates a tunneling bias, which serves to maintain the status quo. Further, Sage's open access mandate has served as justification for poor retention and graduation rates. Weick and Sutcliffe (2015) referred to this as *normalizing* where, what at first might seem alarming, over time becomes normal. Once people have accepted this, it becomes difficult to motivate them to change.

A common refrain heard at Sage is the consistent underfunding from the provincial government. Of the 25 postsecondary institutions in the province, which includes colleges, institutes, and universities, Sage ranks 20th in per-student funding, yet sixth in full-time equivalent student utilization rates (Student Union, n.d.). This funding structure is largely a relic of Sage's community college days. When Sage

transformed into a university the provincial government neglected to factor in that faculty engaging in research and scholarship take on fewer courses than college faculty, thereby increasing operating costs (Dennison, 2006).

A university structure also offers a boon of resources through faculty service requirements. Service, if leveraged successfully, has the power to propel change forward. If meetings are conducted effectively, Sage has the time and human resources to influence change (Appendix D). If done poorly, committees represent a serious missed opportunity. Therefore, one powerful solution for addressing this problem of practice is for the university committees to redefine their identity. This new identity would be one in which a collaborative culture of curiosity, inquiry, problem-solving, and improvement becomes the normative standard of engagement. This requires that the structures, habits, and routines of committees are modified to remove barriers to democratic participation. Thus, a potential intervention is for the change leader to facilitate participatory interpretation of data using a collaborative data analysis protocol.

Cognitive Broadening

Cognitive broadening, as outlined in Table 6, involves “learning new concepts and new meanings for old concepts” (Schein & Schein, 2017, p. 334). The key organizational components that need to be reconceptualized to address the problem of practice are cultural norms of decision dynamics and authority structures, and philosophical beliefs relating to the value of postsecondary education. University committee norms of hierarchical, transactional leadership, and passive engagement often result in collective blindness (Turner & Pidgeon, 1997), where valuable knowledge is outside the organizational periphery due to a lack of inclusion and diversity. To remedy this, Weick and Sutcliffe (2015) called for *deference to expertise*, a relational process involving inquiry, diverse opinions and data sets, and the co-construction of knowledge.

As an inclusive leader, I must be aware of low status individuals who may be abdicating their

responsibility to contribute, either due to fear or a reliance on perceived experts (Barton & Sutcliffe, 2009). Therefore, one influential intervention for addressing the problem of practice is to provide protected time and space for learning, a container (Isaacs, 1999) where different perspectives can be explored.

Existing cultural norms surrounding the value of postsecondary education must be broadened to move beyond simple economic metrics to more socially just process and outcome measures (Hazelkorn & Huisman, 2008; Hoare & Goad, 2019). Sage is committed to responding to the Truth and Reconciliation Commission of Canada's (2015) *Calls to Action* and must consider how social and economic mobility are defined from the worldview of the local Indigenous communities.

Crazy Bull (2020), president of the *American Indian College Fund*, expanded upon this perspective at the accreditor's annual conference by articulating measures related to community wellness, redistribution of wealth, upholding tribal sovereignty, preserving language, culture, and histories, protecting resources, and contributing to family and community. Therefore, it is essential that I understand the ways in which Sage's dominant cultural norms mediate, impede, or limit the adoption of culturally-responsive performance measures and definitions of student success.

The *BC Accountability Framework* and accreditor's *Standards for Accreditation* have historical roots in Western Eurocentric ideologies (Anderson, 2020; Baskin, 2016). This is especially problematic as much of our understanding about human behaviour is filtered through a Western, educated, industrialized, rich, and democratic (WEIRD) social frame of reference (Henrich et al., 2010). WEIRD thinking shapes how institutions see and measure success (Fine, 2017; Smith, 2012; Zuberi & Bonilla-Silva, 2008), which creates a persistent and pervasive tension requiring Sage to juggle an external orientation incongruent with its community college roots and ten-year vision to provide a place of belonging for all learners.

A key feature of the cycle of learning/change includes providing role models and exemplars. As

the quality assurance practitioner, it is my responsibility to provide education and training for each of the university committees. Therefore, an intervention for resolving the problem of practice is sharing research-based and locally derived models of practice with the university committees to expand methodological perspectives and facilitate cognitive broadening.

Scholars have illuminated the limitations of economic logics that are commonly used to define performance, such as employment earnings and retention rates. When students at 4-year private, 4-year public, and 2-year public institutions in North America were asked “How do you define student success in postsecondary education; and, based on that definition, how would you measure it?” seven themes emerged: engagement, relationships and empowerment, health and wellbeing, economic, academic, navigating institutional processes, and personal growth and resilience (Hoare & Goad, 2021b). The student participants further acknowledged the subjective nature of defining student success and argued that these seven themes of student success should be measured both quantitatively and qualitatively (Hoare & Goad, 2021b).

Furthermore, a 2018 report on Indigenous learner success in BC recommended a robust portfolio of indicators for measuring student success that included “the story told in and with the community... and individualized student learning stories” (Davidson, 2018, p. 10). Therefore, a culturally-responsive solution involves embedding qualitative data collection and analysis in institutional operations.

New Standards of Judgement and Evaluation

Successful change requires the development of new standards of evaluating institutional effectiveness, such as creating new performance measures and establishing criteria for committee participation and behaviour. As a constructivist leader, I challenge traditional linear lines of logic, setting static outcomes and measures, and steering committees down pre-determined paths. Instead, I promote constructivist change processes that allow outcomes and measures to emerge naturally

through social construction of knowledge and self-monitoring.

Despite evidence demonstrating the benefits of qualitative research, there persists a quantification bias in the political sector that impacts what is considered reliable evidence and what information is used to inform policy decisions at Sage. Some scholars argued that quantification is second to negligence, observing that it “may conceal more than it reveals” (Donovan, 2008, p. 51) when used to measure research impact. More commonly, however, scholars are less critical, instead arguing that quantitative metrics are strongest for “simple, technocratic issues” (Beerkens, 2018, p. 281), yet insufficient for the complexities of real life (Clemens & Tierney, 2017; McCormack et al., 2014; Trigwell, 2001). Still, others provided a more balanced assessment calling for multiple indicators and diverse data sets that include both quantitative and qualitative methodologies (Alsarmi & Al-Hemayri, 2014; Caracelli & Cooksy, 2013; Chalmers, 2008; Tam, 2001).

Weick and Sutcliffe (2015) provided convincing evidence that high reliability organizations are reluctant to rely on simplistic measures, arguing that they “take deliberate steps to create more complete and nuanced pictures of what they face and who they are as they face it” (p. 8). Sage’s overreliance on decontextualized quantitative metrics is akin to simplification, which obscures and masks the complexities of the human experience. However, Sage’s senior leadership have acknowledged the importance of experimenting with qualitative measures for illuminating the experiences of underserved students. Yet, the approach of senior leadership has been hands-off thereby encouraging a grass-roots, bottom-up approach to change. As a result, change has been slow, iterative, experimental, and unevenly distributed amongst the four committees. This necessitates that I intentionally embed myself within the ongoing interactions and emerging narratives that shape the committees’ work and contribute to meaning-making in order to effectively improve performance measurement.

Postsecondary institutions can be more responsive to the needs of diverse learners by addressing gaps in Western evaluation methods that are in opposition to the standards of some

Indigenous peoples. For example, Western evaluation methods prioritize individual achievement over collective, labour market readiness over moral development, quantitative metrics over qualitative narratives, and efficiency and expeditiousness over time for deliberation and contemplation (LaFrance & Nichols, 2009). Therefore, a culturally relevant intervention requires a change leader who models a reluctance to simplify and advocates for operational alignment with new standards of evaluation.

As an inclusive and constructivist leader, I practice a reluctance to simplify by empowering committee members to own the solutions they devise and to tinker and iterate until their desired results come to fruition. As a white settler, I acknowledge my limitations in terms of understanding the complexity of cultures other than my own; therefore, I aim to democratize the evaluation process through processes for full participation. This gap analysis identified several organizational components that can be leveraged to address the problem of practice, including: redefining the university committees' identities, creating containers for critical inquiry and dialogue, embedding qualitative data collection and analysis into university operations, and rethinking cultural norms of simplification. In the next section, I will explore these potential interventions in greater depth.

Possible Solutions to Address Problem of Practice

In this section, I will draw upon findings from the gap analysis and propose three solutions as part of a theory of action model for culturally-responsive postsecondary performance measurement (Appendix G). I will interrogate each solution by identifying strengths, weaknesses, and resource needs. Based on this interrogation, I will recommend a suite of change practices as part of a final solution for resolving the problem of practice. After critically analyzing the organization, I reject the option to uphold the status quo. Instead, what follows are three potential solutions: (1) embed qualitative research into operations; (2) engage students as co-creators of knowledge; and, (3) transform university committees into professional learning communities.

Solution 1: Embed Qualitative Research into Operations

In Chapter 1, I articulated PEAQC (participatory, emergent, appreciative, qualitative, catalytic) Principles for culturally-responsive postsecondary performance measurement, one of which states: performance indicators are most reliable and valid when assessed as a collection of diverse data sets. Therefore, the first solution aims to diversify the existing performance measures by embedding qualitative evaluation methods into university operations.

The feasibility of incorporating qualitative research methodologies into the university's operations must consider: availability of comparative data; required level of expertise for data collection and analysis; ability to collect data on a cyclical basis; and, financial costs, including technical and human. Table 7 summarizes a range of change practices and required resources. Of the six resource-types listed—time, human, financial, technological, informational, and relational—only one has a renewal effect: relational. Whereas the others are energy consumers, the positive energy gained through relational practices can uplift, motivate, and energize (Cameron & McNaughton, 2016). Research has shown that relational energy surpasses power and information in predicting performance (Baker et al., 2003, 2004); therefore, it is an important resource to consider when selecting a solution.

Table 7

Solution 1: Resource Needs

	Analyze existing qualitative survey responses	Partner with faculty	Revise job descriptions	Develop institutional survey
Time	✓	✓	✓	✓
Human	✓	✓	✓	✓
Financial			✓	
Technological			✓	
Informational			✓	✓
Relational		✓	✓	

Concerns over the availability of qualitative data are a strong deterrent for adopting this change, particularly in terms of the time and human resources required for data collection and analysis (Table 7); however, there is a vast underutilized database of existing qualitative information available to Canadian

postsecondary institutions. For example, Chambers' (2010) thematic content analysis of the open-ended question on the National Survey on Student Engagement (NSSE) revealed its potential supplemental use to the quantitative results, as well as context-specific insights. Similarly, Grebennikov and Shah (2013) demonstrated how qualitative data can be used as an effective institutional performance indicator to track trends related to qualitative data from student feedback surveys over a ten-year period and identify "hot spots for improvement" (p. 615), including solutions from the student perspective.

Sage surveys its students on a cyclical basis and thus has access to a wealth of qualitative data, for example: Canadian University Survey Consortium, Canadian Graduate and Professional Student Survey, and Indigenous Undergraduate Student Survey. These surveys include open-ended questions (Appendix F). Sage's office of institutional research collects and analyzes qualitative survey data and subsequently no additional resources are required; however, at present, the results are not tied to Sage's mission fulfilment planning and evaluation process.

Alternatively, Sage could develop its own institutional survey that incorporates quantitative and qualitative questions designed to measure outcomes relevant to mission fulfilment. Discussions surrounding the development of such a survey have been ongoing for several years. Given the recent adoption of a ten-year vision, this may be an opportune time for the institution to invest in the development of its own student survey.

While survey results such as NSSE are useful for gathering meaningful data on a large scale that can be disaggregated by discipline, policy transformation requires a common understanding of problems, as opposed to the dominant perspective (Beerkens, 2018). Therefore, real change requires active participation in the co-creation of new knowledge on the part of those the university claims to serve. Scholars have frequently called for the generation of new data through participatory, contextualised, and holistic research methodologies (Disterheft et al., 2015; Fine, 2017; LaFrance et al., 2012; Rog, 2012; van Note Chism & Banta, 2007). To enact this, the university committees could partner

with faculty to conduct research on student success. The limiting factor with such an approach is that faculty may not be interested in the research topic, particularly if it detracts from time spent on their own research interests.

One of the university's values is *curiosity*, which encourages members of the institution to seek out new ideas and embrace change through "creative, critical, yet thoughtful purpose" (Sage, 2020, p. 1). Faculty, staff, and students are thus perfect agents for facilitating this change effort. Counselors, academic advisors, and students can be trained to conduct interviews (Fine, 2017; van Note Chism & Banta, 2007). Additionally, fieldwork guides and ethical principles and practices can be standardized in institutional procedural documents (United States Government Accountability Office, 2003; Nygaard & Bellugi, 2011). However, the drawback of this approach is the increased workload for employees and the financial cost of training.

Cornell University's (Meyerhoff, 2020) Office of Engagement Initiatives offers an example of the time and financial commitment for training faculty and staff in qualitative research techniques. The office facilitates two-day workshops on ripple-effect mapping for faculty, staff, and students. Sage has the internal expertise to facilitate such a workshop; however, facilitators and participants would need to commit to attend two days, in addition to workshop preparation. The financial costs associated with event planning would amount to roughly \$1,500 including catering and printing costs for roughly ten participants. These are not uncommon expenditures for the offices of research and quality assurance at Sage.

Solution 2: Engage Students as Co-creators of Knowledge

The second solution attempts to address two PEAQC Principles: participatory (inclusive) and emergent (generous timeframes). A solution that has potential to address these principles involves engaging students as co-creators of knowledge. Sage is committed to undergraduate research training and offers several programs such as research apprenticeships and undergraduate student research

ambassadors. In addition, the university has a policy to evaluate every course, every time it is delivered through student course evaluations. Therefore, the capacity to partner with students exists; however, each change practice provides varying degrees of analysis, time commitment, and replicability of project methodology. What follows is an interrogation of the efficacy of engaging students in data collection and analysis of qualitative performance measures. Table 8 summarizes the possible change practices and the resource needs.

Table 8

Solution 2: Resource Needs

	Modify student course evaluations	Student ambassadors	Student storytellers
Time	✓	✓	✓
Human	✓	✓	
Financial		✓	
Technological			
Informational	✓	✓	✓
Relational		✓	✓

Using evaluation as a teaching tool enhances the constructive use of course evaluations and student feedback surveys and leverages existing resources (Table 8). Students can be taught how to provide good feedback (Nygaard and Belluigi, 2011) and faculty are central in this process as they are uniquely positioned to grasp complex contextual factors. However, the literature is abundant with evidence that student course evaluations are “imperfect at best and downright biased and unreliable at worst” (Ryerson University v Ryerson Faculty Association, 2018, p. 5), as was the finding of a ground-breaking arbitration for *Ryerson University versus Ryerson Faculty Association*. Necessarily, Sage and the faculty association have similarly specified that student course evaluations cannot be used as evidence of teaching effectiveness; therefore, course evaluations are not a viable change practice for resolving this problem of practice.

As places of teaching and learning, universities benefit from structures that promote co-curricular activities that enhance student learning, such as undergraduate research. Scholars suggest

that this strength can be utilized to support the implementation of qualitative research methodologies (Fine, 2017; van Note Chism & Banta, 2007). For example, Southern New Hampshire University (LeBeouf, 2020; NSSE, n.d.) offers a program called *Inquiry Scholars* where students analyze results from the NSSE open-ended questions to inform improvements to teaching and learning.

Similarly, Sage has a well-established undergraduate research ambassador program. The program accepts roughly ten students per year who work on a range of projects. Currently the students are supporting the office of research and graduate studies' cultural mapping project, which aims to qualitatively measure knowledge building pathways and community partnerships. However, several limitations exist with the current structuring of the program. First, research projects are confined to the priorities of the office of research; therefore, broadening the program to support mission fulfillment processes would require an openness to collaborate across the four university committees.

Second, expanding programming has financial implications as ambassadors are each awarded \$3,000. Extending the program across the four committees, with a minimum of two ambassadors per committee, would total \$18,000. The funds could be procured via an application through the university's strategic initiative fund—a program designed to support Sage's strategic priorities. However, it is a competitive process with a high degree of uncertainty and, therefore, not a sustainable funding source for the long-term.

Third, the office recently reviewed the program with an equity, diversity, and inclusion lens and determined that the qualifications for students to participate unfairly privilege certain groups of students. As the program is under review, this may be an ideal time to consider cross-committee collaboration, a sustainable funding model, and expanding the program as the relational benefits that could accrue potentially outweigh the time and financial resources required to expand the program.

One promising practice that could be leveraged stems from Sage's faculty of student development who employs students as storytellers. University staff work with students to answer the

question: “when it comes to the student life experience, what kind of stories do we want to hear, and what stories do we want to tell?” (Student Development, n.d.). Helena College (n.d.) has a similar program titled *Necessary Narratives* with the goal of fostering social belonging, celebrating student diversity, and raising awareness about adversity. The program helps students “identify, craft, and record their own personal stories to help foster social belonging” (Helena College, n.d., para.1). Additional examples for engaging students as researchers include the use of photovoice, which involves participants taking pictures to document some aspect of their lives (Eberle, 2018), such as participatory action research projects conducted to measure students’ perceptions of belonging (Stack & Wang, 2018) or barriers students with disabilities experience (Agarwal et al., 2015).

Stories that communicate purpose and value reinforce group identity (Bolman & Deal, 2013). This speaks to the power of students as change agents and responds to individuals’ and groups’ need to connect to a greater purpose. Modifying the research ambassador and student storyteller programs to support mission fulfillment processes, instead of developing new programs, will require primarily relational and financial resources (Table 8).

Solution 3: Transform University Committees into Professional Learning Communities

The remaining PEAQC Principles include: appreciative (strengths-based) and catalytic (action-oriented). Thus, the final solution proposed is to redefine the identities of the university committees as professional learning communities (PLC). The university committees offer an intriguing opportunity to rethink norms of engagement. Transforming university committees into PLCs appears to be a novel idea based on its absence in the literature. However, curiosity is one of Sage's values—“We seek out new ideas and embrace change, understanding they may involve risks” (Sage, 2020, p. 1). As such, Sage is an ideal environment for experimentation.

Lambert et al. (2016) defined PLCs as “ongoing, embedded in a specific need in a particular setting, aligned with a reform initiative, and grounded in collaborative, inquiry-based approach to

learning" (p. 52). Elements of PLCs include: shared values and vision, inclusive leadership, relationship-building, professional development, and peer-to-peer support (Hall & Hord, 2015). Simply put, PLCs are "a network of conversations" (Hall & Hord, 2015, p. 171). Table 9 summarizes the resource needs for transforming committees into PLCs.

Table 9

Solution 3: Resource Needs

	Committees as PLCs	Working groups as PLCs	Collaborative data analysis protocols
Time		✓	
Human	✓	✓	✓
Financial			
Technological			
Informational	✓	✓	✓
Relational	✓	✓	✓

As shown in Table 9, transforming the committees into PLCs can take multiple forms, each drawing largely upon human, informational, and relational resources. As detailed in Appendix D, there is ample time available for reciprocal learning if meetings are facilitated effectively.

Lougheed and Pidgeon's (2016) study on academic governance identified structural and cultural behaviours of effective committee decision-making, including: a participatory culture, membership representative of the university community, and a diversity of opinions. However, this can be stymied by individuals who do not contribute, either due to lack of knowledge or fear of voicing a divergent opinion, or overloaded faculty and students. Study participants (Lougheed & Pidgeon, 2016) offered several suggestions for improvement, such as: smaller committees that allow for more active engagement, organized and knowledgeable committee chairs, and clearer committee mandates. Establishing working groups that operate under principles of PLCs is within my purview as the change leader, and may be more manageable, yet requires participants to volunteer roughly ten to 15 additional hours annually.

Norms of transactional leadership approaches and passive engagement in university committees are typical in Canadian postsecondary institutions and at Sage. Farris's (2018) qualitative comparative analysis of normative behaviours and organizational citizenship behaviours in university administrative

committees illuminated the potential challenges of rethinking the structures of committees given the prevailing norms. For example, all study participants noted that behaviours they typically observed in committee meetings, such as individuals distracted by personal device or not volunteering for additional tasks, are not conducive to committee productivity (Farris, 2018). Therefore, if Senate committees are to be a viable solution by functioning as PLCs, then the cultural norms raised in Farris's (2018) study will need to be addressed. A more feasible change practice would be to establish working groups that have not yet solidified cultural norms. As previously mentioned, the large size of each of the university committees (17-24 members) can be cumbersome and stifle dialogue, thus establishing smaller PLCs with appropriate representation could improve participatory inquiry.

The greatest barrier to implementing this solution is cultural. Shifting from unidirectional, transactional communication to active engagement and deference to expertise requires a change leader who models and facilitates dialogue, and is reluctant to simplify. This requires that I create spaces for reflection, experimental practice in real-world settings, and celebration (Lambert et al., 2015). One mechanism for doing this is implementing a collaborative data analysis protocol in the mission fulfilment reporting cycle. A structured protocol for collaborative analysis includes steps for reviewing, predicting, clarifying, and interpreting data. The resources required to implement this change are primarily relational.

Determination: Combination of Small-Scale Change Practices

The proposed solutions discussed above and outlined in Table 10 aim to draw upon the strengths inherent in Canadian postsecondary institutions; however, have the potential to be blocked by weaknesses inherent in those same institutions, such as resource constraints and overloaded faculty and staff.

Table 10*Possible Solutions for the Problem of Practice*

No.	Solution	Description	Advantages	Disadvantages
1	Embed qualitative research into operations	Existing qualitative data are analyzed. New qualitative methods are introduced. Partnerships are formed with faculty. Staff receive training in qualitative research methods.	Work is embedded in day-to-day operations. Employees receive professional development training. Employees receive real-time feedback.	Increases employee workload. Requires regular education and training. Faculty may not be interested in the research topic
2	Engage students as co-creators of knowledge	Students are taught how to provide constructive feedback. Research assistants, student ambassadors, and student storytellers collect and analyze data that measure institutional performance.	Feedback received on student surveys are more meaningful. Students are empowered as change agents. Students learn valuable research skills.	Increases cost of student co-curricular programs. Students are only available for one or two terms. Students may not be interested in the research topic.
3	Transform university committees into PLCs	Replaces transactional meetings. Committee members engage in dialogue and shared inquiry. Smaller working groups serve as containers for inclusive leadership. Collaborative data analysis protocols are used to review performance indicators.	Engages 70+ people. Employees' opinions and actions influence change. Data is shared in low-stakes, psychologically safe environment conducive to change.	Contradictory to cultural norms of passive engagement, over simplification, and deference to authority. Requires individual commitment to active engagement.

Modifying Sage's performance measurement system impacts both cultural and structural components of the organization, including university governance and departmental operations. Therefore, a solution that has the greatest reach and depth of impact requires numerous small-scale change practices. However, implementing all of the proposed practices would be ambitious and, in some cases, beyond my current scope of influence. Therefore, I will focus on those elements that are the most realistic. Addressing the problem of practice with multiple small-scale solutions simultaneously will increase the probability of success and is in line with the cultural philosophy of sustainable, incremental change (Schein, 1996; Weick & Sutcliffe, 2015).

The chosen solution respects the change drivers for achieving the ultimate goal of contextualized performance measures that provide actionable information for improving student outcomes. Below are the three change practices extracted from solutions 1, 2, and 3 (Table 10) that will be combined to resolve this problem of practice:

- Build collaborative culture of inquiry (solution 3) by facilitating collaborative data analysis protocols and establishing working groups that have diverse representation.
- Modify student ambassador and storyteller co-curricular programs to incorporate research on students' lived experiences (solution 2).
- Advocate for institutional investment in qualitative data analysis, including the development of an institutional student survey for annual distribution (solution 1).

The selected changes build upon the strengths and aspirations of the university. First, Sage's robust committee culture provides a foundation for inclusive decision-making. By facilitating collaborative data analysis protocols, I can support cross-committee collaboration and begin to break down the siloed approach to mission fulfilment planning. Second, Sage's strong undergraduate research programming provides a mechanism for engaging students in mission fulfilment planning research. Third, Sage's commitment to honouring truth, reconciliation, and rights of Indigenous peoples obligates the university to decolonize its evaluation practices by investing in qualitative methodologies.

To evaluate the effectiveness of these changes, a commonly used functionalist model is Deming's (1993) Plan-Do-Study-Act cycle. However, considering that the change practices stem from the five PEAQC Principles (Appendix C), I will instead use Patton's (2018) principles-focused evaluation, which examines: (1) the utility and relevance of the principles, (2) whether they are being followed, and (3) if following the principles lead to the desired results. Application of principles-focused evaluation will be detailed in depth in Chapter 3. In the next section, I will explore leadership ethics and organizational change issues through the lens of an ethic of community (Furman, 2004).

Leadership Ethics and Organizational Change Issues

Canadian postsecondary education is grounded in an ethic of justice, which focuses on rights, laws, and public policy for ethical guidance (Beck & Murphy, 1994). Provincial legislation regarding public universities has rules surrounding accountability, including the powers and composition of senate

and the board, and collective agreements articulate definitions for academic freedom, non-discrimination, and academic integrity, to name a few. An ethic of justice reflects a “faith in the legal system” (Poliner Shapiro & Stefkovich, 2014, p. 9); therefore, justice emerges from “communal understandings” (Starratt, 1994, p. 50). As a result, educational policies are not value-free. Consequently, ethical decision-making in the postsecondary education sector is informed by a neoliberal rationality (Brown, 2015) and WEIRD thinking.

Questioning social and institutional norms is integral to scholarly practice. This is highly relevant in a time of truth and reconciliation as Indigenous knowledges and ways are accepted (or not) by colonial academia (Smith & Smith, 2018) and as the globalization of postsecondary education challenges WEIRD views of academic integrity and plagiarism (Leask, 2007). Thus, it behooves postsecondary education leaders to critically examine and question the rule of law, in particular as it relates to service, equity, and the local community. Moreover, postsecondary education leaders must be prepared, when necessary, to bend and adapt rather than be rigid with policy.

Ethical Commitment of Sage University

Sage is committed to providing a place of belonging, “where all people are empowered to transform themselves, their communities, and the world” (University, 2020, p. 1). The university values inclusion and diversity, and is committed to equity, including eliminating opportunity gaps for Indigenous and rural learners. Sage aims to “nurture a flourishing relationship with [Indigenous] people on whose lands we reside” (University, 2020, p. 2). A strong commitment to community-mindedness, including community research and scholarship, requires that Sage embed principles of democracy in its evaluation processes.

Busch’s (2014) critique of rising neoliberalism and marketization of postsecondary education called for greater democracy and heterarchy in university governance. Busch posed three questions on democracy, which all postsecondary education leaders seeking to develop more culturally-responsive

performance measurement systems should contemplate:

1. What do we mean by democracy?
2. What institutional structures promote democracy?
3. Does the university have institutional structures that promote democracy, in terms of internal governance and preparing graduates to recognize and respect the value of diverse cultures and worldviews?

Below I critique democracy in postsecondary education and offer an approach for a more inclusive mission fulfilment planning and evaluation governance system.

What Do We Mean by Democracy?

Principles of collegial governance underpin democratic decision-making at Sage; however, senate and board decisions are made by majority vote. When democracy is operationalized through voting, it assumes that the majority is always right. This is counter to the governance structures of some Indigenous peoples whose systems are based on “ethics that reject domination and exploitation” (Tuck & Yan, 2012, p. 19) and “interdependence, cooperation, respect for Elders, and time based on nature” (Baskin, 2016, p. 122). This creates tension as Western models of governance emphasize action and time based on the clock, in addition to competition and individual autonomy.

Ethical leadership demands that the rights of underrepresented and underserved are considered through partnership and collaboration. Ethical leaders recognize and respect the value of diverse cultures and worldviews in relation to definitions of democracy and decision-making. Consequently, I must endeavor to explore whether the governance practices at Sage create space for marginalized voices and different ways of viewing organizational governance. An ethical approach that facilitates this is Furman’s (2004) ethic of community.

Ethic of community values the ideals of a democratic community whereby individuals are committed to open inquiry and the inclusion of diverse perspectives. This view of democracy moves

away from emphasizing “freedom to pursue individual self-interest” (Furman & Starratt, 2002, p. 111) to instead centering issues concerning the common good of the community. Similarly, Furman’s (1998) understanding of *community* avoided assumptions of community as *sameness*—emphasizing commonalities and distinct boundaries—to instead viewing community as a model that elevates difference through respect, appreciation, and cultural humility. This moves the university from an isolationist perspective to one that builds strong partnerships with the surrounding communities (Furman & Starratt, 2002).

What Kinds of Institutional Structures Promote Democracy?

As an inclusive and constructivist leader, I must ensure that the university committees have full participation in the design of mission fulfillment processes, which includes determining measures of institutional performance. This differs from hierarchical approaches where leaders do not ask for advice, input, or recommendations from those responsible for enacting change (Lambert et al., 2016). Furman (2004) delineated three processes for promoting democracy: (1) processes for knowing, understanding and valuing, (2) for full participation and inquiry, and (3) for working towards the common good.

The first process aims to learn, understand, and value others as unique individuals (Furman, 2004). Central to this is intentional listening. Listening increases our understanding of stakeholder values and the environmental factors that may be impeding student achievement. Most importantly, it forces quality assurance practitioners to question whose interests are considered in goal-setting and whose values are given priority by interrogating what is assumed or claimed at the university about the people needing improvement. As an inclusive and constructivist leader, I must ensure that committee members have access to information in order to determine goals, actions, and policy. This is contrary to hierarchical approaches where the leader controls information and institutional goals are set by those with formal authority.

When leaders listen deeply they nurture ethical principles of self-regulation and free will by

allowing individuals to exercise their capacity of discernment and judgement (Langlois & Lapointe, 2014). This requires that leaders suspend their assumptions, a necessary condition of dialogue (Bohm, 1996/2013; Isaacs, 1999). However, an efficiency agenda often supersedes democratic participation (Neave, 2012) resulting in the perception that quality assurance is a “merely innocuous, passive, and neutral administrative process” (Kim, 2018, p. 2). This stems from a lack of engagement with the broader community and lengthy reports that deter readership.

At Sage, the committees are pushing against hierarchical leadership approaches where data and information are delivered selectively. As an inclusive and constructivist leader, I support the committees in their efforts to question the validity of available data and seek out new, innovative measures to assess progress and inform improvement through pluralistic knowledge bases informed by dialogue and inquiry. One mechanism for combatting the efficiency agenda is the creation of a container, a safe setting designed to stimulate human interaction (Isaacs, 1999). At Sage, this container can be created with the establishment of working groups, a protected meeting space without the pressures of individualism and competition.

The second process aims to foster participation through structured opportunities for dialogue and deliberation (Furman, 2004). However, conditions for participation in quality assurance processes at Sage are both intentionally and unintentionally privileged. Participation is selective based on positional authority, for example administrative positions or tenured faculty, thereby elevating the status of some while silencing others. Moreover, those privileged to participate may not feel secure enough to question authority (Kim, 2018), a consequence of “bureaucratic and market structures [that] work hand in hand... to disrupt democratic efforts” (Ryan & Rottman, 2009, p. 493). In addition, a tendency to categorize stakeholders by equating them with specific roles, or worse yet engaging in tokenism (Kanter, 1977), risks the assumption that the experience of individuals of a particular cultural identity is homogenous. Additional barriers identified by Furman (2012) include deficit thinking regarding marginalized groups

and elevating technical leadership over ethical leadership. Therefore, a challenge I must contend with is the validity of a Western performance measurement system that promotes the dominant narrative, thus elevating the worldview of a particular group at the expense of others.

The third process aims to benefit members of the community (Furman, 2004) through collective action and active participation. Therefore, an effective mission fulfilment planning and evaluation process must reject a governing rationality where market values and metrics reign supreme at the expense of community wellbeing. Instead, the process should be designed to cultivate conditions where people challenge power structures, standardized norms and representation, and dominant conceptions of justice (Brown, 2015). An appreciative inquiry approach (Cooperrider, 2013) offers such an antidote as it focuses on the positive core of Sage and the human relationships within by asking such questions as: What factors contribute to the success of Indigenous and rural learners at Sage?

Unfortunately, deficit-thinking, including how issues are framed and data is analyzed, is common in Western organizational development theory (Stavros et al., 2016), social science research (Zuberi & Bonilla-Silva, 2008), and performance measurement (Anderson, 2009). Consequently, I must be cautious of how performance is framed at Sage because deficit-thinking negatively impacts racially marginalized peoples (Anderson, 2020; Joseph, 2018; LaFrance & Nichols, 2012; Zuberi & Bonilla-Silva, 2008). As an inclusive leader, I must consider research-informed practices with a multicultural lens to amplify different worldviews (Appendix E).

Do Institutional Structures Promote Democracy?

Furman (2012) identified several themes that comprise the nature of leadership for social justice: inclusive and democratic, relational and caring, and reflective. However, Sage's strict reporting timelines act as a barrier to achieving these ideals. This results in what Sekerka (2016) referred to as *compliance as a moral minimum*, where an adherence to regulation and obedience to external controls upholds the status quo. To move beyond a compliance mindset requires that I model ethical behaviour,

create reward systems that promote collaboration, and ensure that Sage's mission fulfillment planning and evaluation process includes transparent communication. Additionally, it requires that I ensure research-informed practices, such as the necessity of including both quantitative and qualitative measures to evaluate student success, are not dismissed as a luxury but rather viewed as an obligation of postsecondary institutions (Tebtebba, 2008).

As an inclusive and constructivist leader, I must follow ethical methods for addressing inequities by engaging faculty and students as change agents (Furman, 2004) and as vital members of mission fulfillment planning and evaluation. It requires that I step aside as stakeholders take the lead in sense-making and data interpretation "to ensure the richness, subtlety, and nuance of meaning are not lost in translation" (Wehipeihana, 2019, p. 372). This reframes how we view students as consumers (Brown, 2015; Cardoso, 2013) to instead as primary researchers.

Methods that prioritize strengths-based, anti-deficit approaches to evaluation and situational responsiveness, such as cultural ceremonies and research protocols appropriate to the communities the university serves, can support culturally-responsive performance measurement. Furthermore, relational and reciprocal approaches offer a much-needed substitute for the pervasive deficit view of underserved and underrepresented learners, a perspective that attributes failures, such as lack of achievement, to an individual or group deficiency (e.g., lack of effort) rather than to failures and limitations of social systems, including postsecondary education systems.

Summary

Upholding processes that are congruent with Sage's mission and vision requires a change leader who practices principles of inclusive and constructivist leadership and facilitates change through a relational, learning-oriented framework. Thanking committee members for sharing views outside the norm, inviting members to join the conversation when quiet, attending to members remarks when delivered in an unfamiliar accent if not immediately understood, and ensuring wide demographic

diversity on committees are examples of verbal, behavioural, and environmental outcomes of inclusive leadership (Atewologun & Harman, 2020).

Viewed through an interpretivist cultural paradigm—organizations are meaning-making systems, reality is socially constructed, change is emergent and continuous, change processes are heterarchical—this metaevaluation demonstrated the value of broadening methodological perspectives, particularly in relation to how student success is defined and measured. An openness to alternate ways of thinking and measuring success is the common thread throughout this organizational improvement plan. A solution which achieves this end incorporates critical inquiry, dialogue, and collaborative decision-making, and the inclusion of qualitative performance measures. Implementation of this solution, including how the change effort will be monitored and evaluated, is detailed in Chapter 3.

Chapter 3: Implementation, Evaluation, and Communication

In seeking to modify Sage's performance measurement system by embedding the perspectives of the cultures the university serves, I am questioning systems that privilege quantitative approaches to knowledge. Therefore, I operate within a context enmeshed in the political policies and professional standards of a postpositivist paradigm. By viewing this problem of practice through an interpretivist cultural lens, I aim to balance multiple perspectives and worldviews by advocating for epistemological diversity and inclusion. For this reason, I am proposing a suite of change practices that create space for members of the university community to challenge mainstream knowledges by investing time and resources in additional ways of understanding local variability and phenomena.

In Chapter 3, I will outline a plan for managing the change towards more culturally-responsive performance measurement that includes the use of contextualized qualitative measures and inclusive, participatory processes. By following inclusive leadership practices, the diversity of university stakeholders is leveraged to create an equitable community of leaders where individuals are valued for their diverse perspectives (O'Mara, 2015). The plan will include methods for monitoring and evaluating the change process, as well as, communicating the need for change. I will finish the chapter by exploring next steps and future considerations for a continuously evolving theory of action model for culturally-responsive postsecondary performance measurement.

Change Implementation Plan

This section details a disaggregated change implementation plan for addressing the problem of practice—political and postsecondary education leaders' overreliance on decontextualized quantitative metrics for measuring institutional effectiveness and student success. The analysis includes a self-reflective critique—strengths, assumptions, limitations—and plans to mitigate risk. Table 11 details the *Change Implementation Plan*, which includes necessary resources and key stakeholders, as well as an approximate timeline for resolving the problem of practice. Where it is noted *annually*, activities will continue indefinitely as part of ongoing quality improvement. *Committees* refers to the four standing committees of Senate responsible for mission fulfilment planning and evaluation.

Table 11

Change Implementation Plan

Goals	Implementation process	Implementation issues/limitations	Resources	Stakeholders	Timeline
PHASE 1: Creating motivation and readiness for change Phase 1 focuses on <i>disconfirmation</i> , the realization that existing processes do not provide actionable information to improve student outcomes.					
1.a.) Establish the baseline situation, in collaboration with university committees.	Evidence required for establishing baseline situation includes: <ul style="list-style-type: none"> • Audit committee membership and attendance records. • Observe committee meetings. • Interview and survey committee members. • Assess planning process against Kirkhart's (2013) <i>A Culture Checklist</i> and Trainor and Bal's (2014) <i>Rubric for Culturally-responsive Research</i>. • Determine ratio of quantitative and qualitative measures. 	Evidence is readily accessible and can be gathered by the quality assurance (QA) practitioner as part of her duties. There are no perceived issues or limitations; however, survey response rates may be low and not representative of a diversity of stakeholders. This can be mediated by informal, targeted conversations.	Time (12-15 hours)	QA practitioner, Committees	Jan. – Feb. (1 – 2 mos.)
	<ul style="list-style-type: none"> • Host a Student Success Townhall and invite the president of the accrediting agency to present the organization's vision and the principles underpinning accreditation. 	In person events are costly; however, a virtual town hall can save time and money as there is no need to book event space or catering. Virtual events have been shown to have higher attendance rates.	Time (4 hours)	QA practitioner, Committees	Jan. (1 mos.)
1.b.) Articulate a common understanding of the problem that results from the baseline situation.	Engagement and consensus-building activities include: <ul style="list-style-type: none"> • Facilitate critical review of planning process using Lambert's (2009) questions pertaining to the four reciprocal processes of constructivist leadership at a monthly committee meeting. Confirm findings with Core Theme Executive Group. 	Securing 30 - 45 minutes during committee meetings may be challenging as agendas are often full. This can be mediated by booking several months in advance and/or requesting additional time be added to the meeting.	Time (6-7 hours)	QA practitioner, Committees	Feb. – Mar. (2 – 3 mos.)
	<ul style="list-style-type: none"> • Provide committees with professional development opportunities for equitable assessment practices and principles-focused evaluation, including cultural competence and anti-deficit methods. 	Fiscal constraints limit available funds for professional development; however, an institutional focus on diversity, equity, and inclusion suggests a willingness to invest in cultural competency training.	Financial (\$3,000) Time (8 hours)	QA practitioner, Committees	Ongoing
PHASE 2: The actual change and learning process Phase 2 concentrates on developing a clear definition of the ideal future state. This involves cognitive restructuring.					
2.a.) Establish a shared vision and adopt the PEAQC Principles.	Activities required for establishing a shared vision include: <ul style="list-style-type: none"> • Affirm and/or modify PEAQC Principles with members of the Intercultural Understanding Committee, who are mandated to advise Senate on culturally-responsive performance measurement, through a SOAR analysis activity (Stavros et al., 2003). • Host retreat with the four university committees to explain principles-focused evaluation, and review (and revise, if necessary) the PEAQC Principles. 	Planning in person events requires time and money; however, a virtual retreat may not allow for the same interactivity, dialogue, and collaboration necessary to create meaningful buy-in. If a virtual retreat is the only option a follow-up in person event later in the year may be worthwhile.	Financial (\$1,500) Time (6-8 hours)	QA practitioner, Committees	Apr. (1 mos.)

Goals	Implementation process	Implementation issues/limitations	Resources	Stakeholders	Timeline
	<ul style="list-style-type: none"> Submit memorandum to university's governance in order to seek Senate and Board of Governors approval of PEAQC Principles. 	Once proposals are submitted to the university's governance, decision-making and timelines are subject to institutional processes.	Time (1 hour)	QA practitioner	May – Jun. (2 mos.)
	<ul style="list-style-type: none"> Review and revise (as necessary) all procedural documents and reporting templates for alignment with the PEAQC principles. 	This is an administrative task, time-consuming, and fitting within existing workload may cause delays.	Time (15 hours)	QA practitioner	Jun. – Aug. (3 mos.)
2.b.) Invest in qualitative research and evaluation practices.	<p>Activities required to embed qualitative research into operations:</p> <ul style="list-style-type: none"> Audit current qualitative research/evaluation practices across the institution. 	Past institutional initiatives to gather pan-institutional information have proven challenging due to lack of data availability and low response rates to inquiries.	Time (8-10 hours)	QA practitioner	Jun. – Aug. (3 mos.)
	<ul style="list-style-type: none"> Draft proposal for additional funding and modifications to student ambassador and student story-teller co-curricular programs, in consultation with program coordinators, deans, student ambassadors, and university committee chairs responsible for mission fulfilment outcomes related to the qualitative measures. 	This requires a significant amount of relational capacity and support (and willingness to participate) from a variety of stakeholders. Fiscal constraints limit available funds for new programs. Scaled-down versions (pilots) may be required for the first year or two, particularly as we assess the value of the changes.	Time (10-12 hours) Financial (\$18,000)	QA practitioner, Student ambassadors, program coordinators, deans, chairs	Jun. – Sept. (4 mos.)
	<ul style="list-style-type: none"> Inquire with institutional research staff to collaborate on the development of an annual institutional survey for mission fulfilment. Survey university committees to determine questions for an institutional survey for measuring mission fulfilment. Test survey with student focus group. 	This is dependent upon the ability of institutional research (IR) staff to take on additional work. However, the director of IR has expressed an interest in developing an institutional survey, yet whether this is ideal timing is questionable.	Time (4-6 hours)	QA practitioner, IR staff, committees	June. – Sept. (4 mos.)
<p>PHASE 3: Internalizing and learning agility Phase 3 emphasizes new behaviours and practices that are reaffirmed through interpersonal relationships.</p>					
3.a.) Build a collaborative culture of inquiry.	<p>Activities required for building a collaborative culture using a three-tiered approach (Appendix H):</p> <ol style="list-style-type: none"> Establish working groups that have diverse representation; and, develop terms of reference and embed PEAQC principles. 	Working group membership will be drawn from the committees. If the committees lack diversity then the working group members will lack diversity. Moreover, participation will be voluntary; therefore, building motivation and a sense of urgency may be necessary.	Time (4 hours)	QA practitioner, Committees	Sept. – Nov. (3 mos.)
	<ol style="list-style-type: none"> Facilitate annual Participatory Interpretation Activity for each committee. 	Securing 30-45 minutes of committee's time may be challenging as agendas are often full; which can be mediated in advance by requesting additional time.	Time (8 hours)	QA practitioner, Committees	Annually (Apr. – May)
	<ol style="list-style-type: none"> Facilitate an annual joint-committee Mission Fulfilment Collaborative Data Analysis Workshop. 	In person events are costly. A virtual workshop can still achieve many of the same goals, if necessary.	Time (8-10 hours)	QA practitioner, Committees	Annually (Spring)

Goals	Implementation process	Implementation issues/limitations	Resources	Stakeholders	Timeline
PHASE 4: Ongoing monitoring and evaluation Phase 4 acknowledges the emergent and iterative nature of culturally-responsive performance measurement and prioritizes reflection, and self- and peer-evaluation.					
4.a.) Affirm shared purpose and evaluate effectiveness of and adherence to the PEAQC Principles.	Activities required for affirming shared purpose include: <ul style="list-style-type: none"> Host retreat with the university committees to review principles-focused evaluation; and, review and revise (if necessary) the PEAQC Principles using principles-focused evaluation questions (Table 12). 	As previously mentioned, planning in person events requires a time and financial investment. However, the annual budget for the Office of Quality Assurance includes an envelope for event costs that would be sufficient to accommodate workshops and retreats.	Financial (\$1,500), Time (6-8 hours)	QA practitioner, Committees	Annually (Fall)
	<ul style="list-style-type: none"> Survey working groups for perceptions of psychological safety, adherence to principles, and effectiveness of the mission fulfillment process. Seek third party review to protect anonymity of participants. 	Individuals may not feel secure enough in their positions to provide negative feedback.	Time (2-4 hours)	QA practitioner, Committees	Annually (Spring)
4.b.) Mobilize knowledge and seek peer feedback	Activities for knowledge mobilization include: <ul style="list-style-type: none"> Present PEAQC principles, evaluation framework, and opportunities/challenges at the university's Teaching Practices Colloquium. Present at the accreditor's conference, submit an article for publication in the accreditor's quarterly journal; present at an appropriate academic conference. 	Writing articles and presenting at conferences is time-consuming; however, a majority of committee members are faculty and may see this as contributing to their research and scholarly activities.	Time (10-20 hours)	QA practitioner, Committees	Ongoing
4.c.) Assess student ambassador programs for effectiveness of generating data that provides actionable information for improving student success.	Evidence required for assessing effectiveness of programs include: <ul style="list-style-type: none"> Host focus group of student ambassadors and program coordinator(s). Review alignment between research methodology and performance measures (i.e., Does the methodology answer the research question?) 	Application of the research methodology may vary in use across student ambassador programs, thereby impacting the validity of the outcomes. However, variation may also elucidate interesting lines of inquiry that may otherwise be obscured. The benefits gained from student learning outweigh the risk of compromised research design.	Time (15-20 hours)	QA practitioner, Student ambassadors, program coordinators, committees	Annually (Spring)
	<ul style="list-style-type: none"> Map the connections/communication channels between reported results and stakeholders who have the power to influence change. Interview stakeholders. 	Mapping all of the direct and indirect connections will be impossible; however, membership across the four committees is broad-based.			
4.d.) Confirm viability of institutional mixed-methods survey for measuring mission fulfillment outcomes.	Evidence required for assessing effectiveness of survey include: <ul style="list-style-type: none"> Review alignment between research methodology and performance measures (Does the methodology answer the research question? Are survey participants representative of student demographic?) Review workload of IR staff and interview director to ensure sustainability of the annual survey and data analysis. 	4.d. is contingent upon 2.b.	Time (4-6 hours)	QA practitioner, IR staff	Annually (Summer)

Note. Table 11 is adapted from the work of Conzemius and O'Neill (2013) in *The Handbook for SMART School Teams*.

The *Change Implementation Plan* occurs in four phases, which includes the three phases of Schein and Schein's (2017) cycle of learning/change (detailed in Chapter 2), and a fourth phase to ensure continuous quality improvement. The solution for change involves three small-scale change practices that include: (1) building a collaborative culture of inquiry, (2) modifying student ambassador programs to align qualitative research methods with Sage's mission fulfilment planning process, and (3) advocating for institutional investment in qualitative data analysis of student surveys.

As described in Chapter 1, three guiding questions inform steps to move the university towards more culturally-responsive performance measurement. The three guiding questions are:

1. How can quality assurance practitioners support postsecondary institutions with the adoption of qualitative performance measures for assessing institutional effectiveness?
2. What leadership strategies facilitate continuous quality improvement in a culturally diverse environment?
3. How can culturally appropriate performance measures and diverse evaluation methodologies be systemized using limited institutional resources?

The *Change Implementation Plan* (Table 11) includes specific steps for addressing these guiding questions and implementing the solution with particular attention given to honouring inclusive and constructivist leadership practices. For example, in response to the first and third guiding questions, Phase 2.b. is focused on an institutional investment in qualitative research and evaluation practices by leveraging and modifying existing institutional activities, such as student ambassador programs and institutional surveys.

The second guiding question is addressed in Phase 3.a. through a three-tiered approach to collaborative inquiry, which includes the establishment of working groups and facilitated participatory interpretation activities. Moreover, the principles-focused evaluation (Patton, 2018) methodology underpinning the change effort, a utilization-evaluation method that forefronts principles in every facet

of the evaluation process, ensures individual and institutional accountability to ethical leadership.

Inherent throughout the plan are processes for monitoring and evaluating adherence to the PEAQC Principles (Appendix C) and the resulting impact on student outcomes. For example, the goal of Phase 2.a. is to establish a shared purpose and principles for culturally-responsive performance measurement during a joint-committee retreat. Similarly, Phase 4.a. prioritizes affirmation of the principles and assesses stakeholder adherence to the principles. The PEAQC Principles align with Sage's values of inclusion and diversity, community-mindedness, sustainability, and curiosity; therefore, the plan supports progress towards achievement of Sage's ten-year vision by embedding the university's values within the *Change Implementation Plan*. In the next section of this organizational improvement plan, under *Change Process Monitoring and Evaluation*, I will describe in more depth how adherence to an ethically grounded approach will be assured.

Through the use of multiple evaluation techniques, the *Change Implementation Plan* (Table 11) incorporates ways to proactively assess stakeholder reactions to the change, and then adjust the process to reflect legitimate stakeholder concerns through surveys, focus groups, document analysis, and observation (Phases 1.b., 2.a., 4.a., and 4.c.). Furthermore, multiple communication channels are built into the plan's design, including retreats, workshops, and committee meetings (Phases 1.b., 2.a., 3.a., and 4.a.), as well as reporting through Sage's mission fulfilment planning and evaluation governance structure (Appendix H). Under the section *Plan to Communicate the Need for Change and the Change Process*, I will discuss in depth anticipated stakeholder resistance and how it might be overcome.

As a constructivist leader, my axiological assumptions—nature of ethical behaviour—guide my interactions with stakeholders, in particular members of the four university committees. The PEAQC Principles direct ongoing ethical behaviour by focusing on both means (process) and ends (outcomes), both of which can be evaluated (Patton, 2018). Was the principle followed? Does following the principle

lead to the desired outcomes? Ethical principles of constructivist scholars include: trustworthiness and authenticity, balance of fairness, educative authenticity, catalytic authenticity (enabling and empowering others), tactical authenticity (training others), reflexivity, rapport, and reciprocity (Mertens, 2020). Therefore, inclusive and constructivist leadership approaches are explicitly (Phases 1.b., 2.a., and 3.a.) and implicitly (Phases 4.a. and 4.b.) incorporated into the *Change Implementation Plan*. These approaches are intended to increase committee members' agency, thereby enhancing the catalytic effect of mission fulfilment planning and evaluation at Sage.

The current mission fulfilment planning and evaluation process is writing intensive and transactional, which requires me to engage in a significant amount of cajoling and convincing due to the dominant perception that it is a bureaucratic burden. With the proposed changes, emphasis is placed on relationships and dialogue instead of lengthy written reports and the emotional strain of burdening others with unfulfilling work. Shifting from individualism to relationality will further strengthen the committees' agency (Barrett, 2015).

Assumptions, Limitations, and Risk Mitigation

The *Change Implementation Plan* is based upon several assumptions and risks. First, I assume that the change practices and associated activities can fit within my existing workload as the quality assurance practitioner. *Time* is noted most frequently as the resource required to support this change effort, with an estimated 160 hours required to implement the change practices. However, as has been argued throughout this organizational improvement plan, if structured effectively, committee meetings provide ample time to gather evidence to establish the baseline situation, affirm a shared purpose, engage in dialogue, and communicate the change effort. The most notable change will be the addition of monthly working group meetings and the joint-committee collaborative data analysis workshop, which equates to roughly 45 additional hours spread over 12 months, totalling three to four hours per month. By distributing the workload across the four committees, co-constructing knowledge with

student ambassadors, and engaging the broader institution via the offices of institutional research, quality assurance, and research the risk of not achieving the activities in the time allotted is low.

Second, I assume that the financial costs of the change practices can be supported by the institution. The office of quality assurance has a budget line for workshops and retreats that includes the cost of catering and incidentals, which is sufficient to cover the roughly \$3,000 for events (Phases 2.a. and 4.a.). Also included in the plan is \$3,000 for education and training (Phase 1.b.). An annual professional development expense this size is not uncommon for the university; however, the budget ask will have to clearly detail the expected outcomes and benefits in the context of the university's vision to ensure that it is granted. Alternatively, I can supplement education and training by sharing articles and exemplars at no cost and leveraging internal expertise through a distributed leadership approach (Gronn, 2010).

The greatest financial risk proposed is the request for \$18,000 (Phase 2.b.) to increase the size of the research ambassador program. This is highly contingent upon the availability of strategic initiative funds and there is no guarantee that funds will be granted. The strength of the proposal will be dependent upon the success of the current research ambassador program for impacting mission fulfilment planning with the hope that it can justify increasing scale to further improve performance measurement.

Third, while the *Change Implementation Plan* is a linear framework, with narrow goals and activities centred on shifting behaviours, as a constructivist leader I recognize its limitations. Corrigan (2018) cautioned that "imposing a direction or a destination can have a substantial negative impact on the ability of a community to address its issues in a way that is meaningful to the community" (p. 2). Western evaluation approaches based on predetermined goals can stifle constructivist processes of change, which include emergent objectives through problem-finding, pluralistic knowledge bases, relationships, and self-monitoring (Lambert, et al., 2016). For this reason, the plan includes professional

learning and peer- and self-evaluation, intention determined by a shared purpose, inclusion of students' stories, and a three-tiered approach for collaborative participation.

Fourth, successfully implementing this solution is contingent upon me, the quality assurance practitioner, which poses a significant risk should something happen where I am unable to continue with this work. Moreover, for this change to be successful, the change must be internally-driven rather than imposed top-down (Graetz & Smith, 2010). Therefore, a substantial amount of attention is placed upon embedding the change practices within existing institutional policies and processes to ensure sustainability. For example, Phase 2.b. focuses on collaboratively modifying student ambassador programs with deans, program coordinators, committee chairs, and students so that the resulting changes are meaningful to all stakeholders.

In addition, as described in Chapter 1, the Senate Intercultural Understanding Committee is mandated to advise Senate on culturally-responsive performance measurement. Through a facilitated SOAR Analysis activity—strengths, opportunities, aspirations, results (Stavros et al., 2003)—in Phase 2.a., the committee will assume ownership over the process. This is an important phase of the plan whereby members of the communities Sage serves participate in the creation and validation of the principles that will guide mission fulfilment planning and evaluation. Engaging Elders and traditional storytellers in this process creates an avenue to “question the implicit narrative and value structures” (Corrigan, 2018, p. 5) inherent in Canadian postsecondary performance measurement systems.

As an inclusive leader, I am cognizant of the need for strengthening my own cultural competency. The Canadian Evaluation Society (2018) emphasized the importance of culture and context in evaluation. Schein and Schein (2020) encouraged inclusive leaders to embrace “an attitude of cultural relativism” (p. 79), the ability to understand a culture on its own terms rather than using the criteria of one's own culture. Leaders who create safe spaces to explore differing perspectives, assumptions, and cultural biases can mediate cultural misunderstandings.

Szymanski et al. (2020) drew attention to challenges leaders face in Canada when attempting to use an inclusive leadership approach due to the highly multiethnic, multicultural, and multilingual society. Therefore, I must be careful not to project my own cultural assumptions onto members of other cultures. I can practice inclusive leadership by validating the multitudes of diversity within committees, learning about cultural differences, listening to others' stories, and acknowledging committee members as individuals.

Fifth, I assume that senior leadership will continue to support the initiative while honouring an inclusive decision-making process. In Chapter 1, I described the necessity for senior leadership buy-in (Hall & Hord, 2015; Schneider & Peek, 2018), yet cautioned that a dependency upon senior leadership to make decisions is a barrier to inclusive governance (LaFrance & Nichols, 2010; Rainie & Stull, 2016; Vettori, 2012). This tension can be addressed through the effective resourcing of committees without impeding the committees' decision-making processes. Leveraging senior leadership support—in particular, the Provost and budget holders within the offices of institutional research, quality assurance, and research—is essential given my lack of formal leadership authority within the organization. Senior leadership have demonstrated their commitment to mission fulfilment planning by resourcing the committees with the quality assurance practitioner, as well as publicly advocating for honouring truth, reconciliation, and rights of Indigenous peoples, which includes respecting Indigenous research methodologies. Furthermore, if approval is granted for additional funding of the student ambassador program it will signal an institutional commitment to qualitative evaluation practices.

This section detailed a disaggregated change implementation plan for addressing the university's overreliance on decontextualized quantitative measures through participatory, emergent, appreciative, qualitative, and catalytic activities centred on shifting both behaviours and mindsets. The plan articulated a four-phased continuous quality improvement approach, with numerous opportunities for process monitoring and evaluation, communication, and adaptation. In addition, the plan

incorporated risk mitigation by distributing and building leadership capacity across the four university committees. The next section will describe a process for monitoring and evaluating implementation of the change practices.

Change Process Monitoring and Evaluation

In this section, I will describe a process for monitoring and evaluating implementation of adaptations to Sage's mission fulfilment planning and evaluation process. As described previously, the change practices are derived from the PEAQC Principles (Appendix C); therefore, Patton's (2018) principles-focused evaluation will be used for evaluating implementation of the solution.

Patton (2018) argued that a measure of an effectively articulated principle is its evaluability. Can the application of the principle and the resulting outcomes be documented and judged? Can one assess whether the principle supports the achievement of the stated goal—contextualized performance indicators provide actionable information for improving student outcomes? An effective evaluation process thus begins with well-articulated evaluation questions. The following questions will guide the subsequent evaluation and monitoring process:

1. To what extent are the PEAQC Principles meaningful to members of the university committees?
2. To what extent do the university committees and the quality assurance practitioner follow the principles during mission fulfilment planning and evaluation?
3. If the principles are followed, what are the results for students?

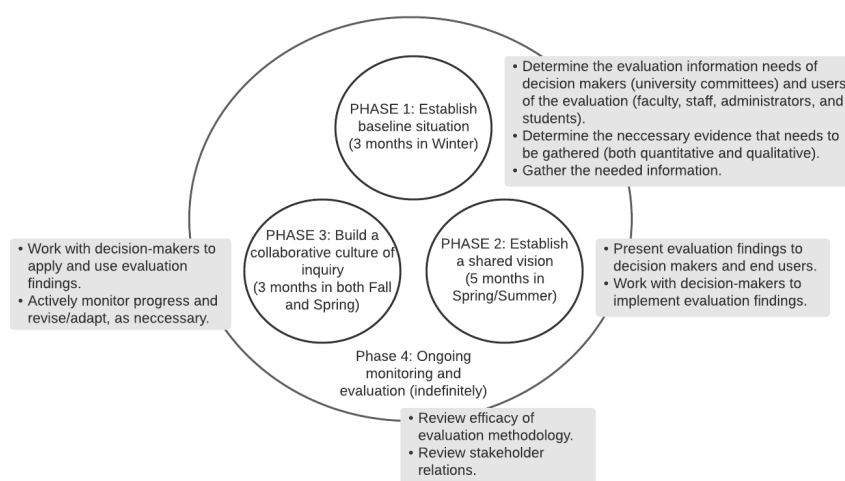
The first principle, *participatory*, assumes that people acting together are far more knowledgeable and capable of enacting change than any one individual alone (Preskill & Brookfield, 2009). As an inclusive leader this means I must ensure that stakeholders have full participation in the design, monitoring, and evaluation of Sage's mission fulfilment planning processes. This principle will appear prominently in the evaluation framework.

The evaluation framework is structured according to the phases of the cycle of learning/change

(Figure 3, Chapter 2) and is built into the *Change Implementation Plan* (Table 11). Consequently, the *Evaluation Cycle* (Figure 4) follows the same four phases described previously. The *Evaluation Cycle* builds on Patton's (2018) basic evaluation processes (*Exhibit 10.2*, p. 79), which included determining the evaluation needs of decision makers and end-users, gathering evidence and presenting findings to relevant stakeholders, and working with decision-makers to apply and use the evaluation findings.

Figure 4

Evaluation Cycle



The PEAQC Principles will be assessed on a five-year cycle with one principle reviewed annually along with a holistic analysis of the committees' level of use (Hall & Hord, 2015). As described in Chapter 1, the four committees are at different levels of maturity in terms of their understanding and level of use, which refers to the behaviors of individuals in relation to the mission fulfillment planning and evaluation process (Table 3, Chapter 1). Levels of use is a valuable diagnostic tool that includes an interview protocol, which can be modified to establish behavioural profiles of the committees during a Core Theme Executive meeting.

Table 12 details the *Evaluation Framework* for the change effort that will be used to track implementation of the change practices and to assess the degree of outcome attainment using various forms of evidence during each phase of the *Evaluation Cycle* (Figure 4).

Table 12

Evaluation Framework

PEAQC Principle	Baseline situation	Desired outcome	Change practice	Process evaluation question	Outcome evaluation question	Evidence for assessing degree of outcome attainment
Participatory: data is meaningful when defined by the user.	Committee members have low sense of agency. There is a decoupling from those who make decisions and those who are responsible for implementation.	Evaluation committees consist of culturally diverse academic peers and stakeholders with cultural competence.	Build collaborative culture of inquiry. Establish working groups with diverse representation.	What processes and activities are implemented to create psychological safety? What processes are implemented to enhance committees' agency? How authentic is the participation?	Who participated? To what extent do committee members feel psychological safety and a sense of belonging? To what extent does committees' dialogue lead to action?	Audit of committee membership and attendance records using <i>Levels of Participation</i> diagnostic (Hoare & Goad, 2021a). Observation of meetings. Qualitative interview (Appendix I) and survey data (Appendix J) from members.
Emergent: a contextualized approach is often emergent with generous timeframes.	External pressures contribute to short-term, reactive thinking.	Evaluation windows for qualitative methodologies allow for longitudinal studies and extended reporting cycles.	Advocate for institutional investment in qualitative data analysis.	What choices, flexibility, and autonomy do committees report having over the process?	How does having autonomy over reporting timelines impact institutional accountability? How does choice in evaluation methodology impact quality of results?	Gantt chart with criteria for meeting accountability expectations (timeline, format) and qualitative research design(s).
Appreciative: culturally-responsive interpretation and communication of research results builds on learner strengths.	Accountability standards are rooted in WEIRD, postpositivist ideologies, which impacts how <i>student success</i> is defined and measured.	Evaluation committees use anti-deficit / strengths-based approaches, are attentive to relationships, and aware of insider-outsider complexity.	Facilitate collaborative data analysis protocols. Provide committee members with professional development in equitable assessment practices.	What is the organization's capacity for appreciative thinking? What are primary sources for ongoing learning?	How does anti-deficit thinking impact students' sense of belonging and motivation to participate in the process?	Quantity of collaborative and professional development sessions and attendance records. Survey data from members on utility of the sessions. Degree of alignment with Kirkhart's (2013) <i>A Culture Checklist</i> and Trainor and Bal's (2014) <i>Rubric for Culturally-responsive Research</i> .
Qualitative: performance indicators are most reliable and valid when assessed as a collection of diverse data sets.	A quantification bias persists and serves to maintain the status quo. This limits what is considered evidence and what information is used to inform decisions.	Evidence portfolios include both quantitative and qualitative measures.	Modify student ambassador and storyteller co-curricular programs to incorporate research on students' lived experiences. Develop a mixed-methods institutional student survey.	What is the organization's capacity for using qualitative evaluation methodologies? To what extent is the organization developing research skills in students?	To what extent do qualitative results enhance institutional-level decision-making? What do students learn from contributing to mission fulfillment planning?	Ratio of quantitative and qualitative measures. Institutional audit of current qualitative research / evaluation practices. Focus group data from student ambassadors.
Catalytic: effective evaluation processes lead to improvement through action.	Committee norms involve hierarchical and transactional leadership, and passive engagement of committee members.	Inquiry leads to action and informs programming that supports student success.	Establish working groups that have diverse representation. Facilitate collaborative data analysis protocols.	What processes and/or policies are implemented to create inclusive and interactive committee meetings?	To what extent does active participation lead to action?	Breadth and reach of mission fulfillment communications. Map of the interconnections between mission fulfillment and other institutional planning processes.

The evaluation will be conducted by the quality assurance practitioner and take place during individual and joint-committee meetings. One way to evaluate change is by establishing baselines and desired outcomes. Adherence to the principles and outcomes can be assessed against the baselines. The baseline information in Table 12 was established through the gap analysis exercise in Chapter 2 (*Critical Organizational Analysis*). I will gather evidence for assessing degree of outcome attainment, in consultation with the committee members, across all four phases of the implementation process (Table 11, *Change Implementation Plan*) thereby embedding sustainable, ongoing processes for monitoring and evaluation into Sage’s mission fulfilment planning and evaluation process. Several evaluation techniques are built into the *Evaluation Framework* (Table 12), including both quantitative and qualitative tools for tracking change and gauging progress. For example, a qualitative interview protocol (Appendix I) can be used to assess the extent that committee members find the principles meaningful. In addition, quantitative rating scales (Appendix J) can be used to survey committee members’ perceptions of the efficacy of the principles in terms of their clarity and utility.

Similarly, Kirkhart’s (2013) *A Culture Checklist* can be used to assess elements of the change effort, such as voice, time, and return; and, Trainor and Bal’s (2014) *Rubric for Culturally Responsive Research* can be used to measure the cultural relevance of the proposed interventions. Integrating and triangulating diverse sources of quantitative and qualitative data, such as interviews, observations, rubrics, and surveys, ensures the rigour and credibility necessary for creating a “plausible theory of change” (Patton, 2018, p. 208) regarding *how* and *why* the principles and associated change practices contribute to improved student outcomes.

The *Evaluation Framework* (Table 12) includes both process-evaluation questions and outcome-evaluation questions to address the means (process) and ends (outcomes) of principles-focused evaluation, which differs from traditional approaches designed to meet SMART goals—specific, measurable, achievable, realistic, time-bound. A principles-focused approach recognizes that principles

are not achievable in terms of checking a box for completion. Rather, principles should guide ongoing behaviours across many projects and processes. As such, principles-focused evaluation is not time-bound, but rather continuous. This distinction is important because Sage has articulated honouring truth, reconciliation, and rights of Indigenous peoples as one of its strategic change goals—a goal that, arguably, is not time-bound nor achievable, but rather ongoing and reflexive.

Furthermore, while SMART goals privilege measurability through quantitative and statistical measures, principles-focused evaluation is concerned with *evaluability*, documenting and judging processes and outcomes using multiple methods, both quantitative and qualitative (Patton, 2018). Moreover, a principles-focused approach is values-driven and ethically grounded.

How theory is translated into practice is detailed in Table 13, which provides concrete examples of how the PEAQC Principles can be applied to evaluate Sage’s mission fulfilment planning and evaluation process through collaborative interpretation activities. The examples demonstrate the reflective behaviour of constructivist leaders and support the development of institutional leadership capacity. As an inclusive leader, I prioritize opportunities for underrepresented and underserved groups to be heard and contribute to decision-making. In addition, as a constructivist leader, I employ heterarchical, collective approaches to facilitate meaning-making.

Table 13 demonstrates the power of inclusive and constructivist leadership. Listening, curiosity, asking constructive questions, learning what works and does not work for colleagues, and championing their successes are all demonstrative of leadership practices that support growth (Preskill & Brookfield, 2009). However, Preskill and Brookfield (2009) cautioned leaders who employ these methods in environments where patriarchal and hierarchical methods dominate due to “cultural indoctrination [where] self-effacing and facilitating leaders who want to support other peoples’ growth are frequently viewed as weak, waffling administrators who cannot make up their minds” (p. 70). Fortunately, as a non-positional leader within my organization, I am able to naturally assume the facilitator role without the

expectation that I dictate decisions.

Table 13

Principles-focused Evaluation using PEAQC Principles

Evaluation purpose	Principles-focused evaluation questions	Concrete examples
Formative evaluation	How can the institution's adherence to principles be improved?	The evaluation shows that students are invited to participate in the evaluation; however, survey response rates are low, students who serve on committees are silent and attendance is poor. The institution should find ways to connect with students on their terms, provide training so that students can effectively contribute to meetings, and ensure that students see the benefits of their contribution.
Accountability evaluation	Is the institution following principles as specified in funding and policy mandates?	The institution's reporting cycle for evaluations requires that reports be submitted by the date specified in the terms of reference. The institution monitors emergent studies that may influence the reporting deadlines, and adjusts accordingly when findings will be most useful to the primary intended users.
Knowledge-generating evaluation	What can be learned about the effectiveness of principles?	The institution follows an appreciative approach for evaluating student success, by starting with and building upon the strengths and positive characteristics of learners. The institution gathers feedback from faculty, students, and elders to generate lessons about the effectiveness of an anti-deficit principle for evaluating student success. The findings are used to judge if the strengths-based approach should be used for other assessment practices at the institution.
Developmental evaluation	How are principles being applied in adaptation of an innovation to new contexts?	Core theme committees are using a mix of quantitative and qualitative indicators to measure progress towards stated outcomes. The committees share with one another how they are adapting to the use of qualitative measures by describing: <ul style="list-style-type: none"> • the different methodologies they are using (e.g., cultural mapping, open-ended survey questions, photovoice, narrative inquiry); • how they are resourcing these efforts (e.g., student ambassadors, research assistants, institutional research staff, off the side of their desk); and, • how they are adapting methods based on different contexts, faculty and staff expertise, cultures, and learner-types.
Summative evaluation	Are the principles relevant and effective? Should they be maintained, modified, replaced?	The institution follows a catalytic principle that stresses the importance of improvement and action. The environmental sustainability committee has recently gathered data which demonstrates that capital developments are having a negative impact on local biodiversity. The committee uses the findings to discuss if the catalytic principle needs to be clarified as some people at the institution associate <i>improvement with growth and expansion</i> .

Note. Table 13 is a modification of Patton's (2018) *Exhibit 5.2* (p. 28).

Self-reflection is a useful evaluative tool; however, much wisdom can be gleaned by combing through research, theory, and practice. For example, Anderson and Smylie's (2009) research on health systems' performance measurement in Canada articulated powerful insights into how these systems act as a cultural imposition and perpetuate mistrust in Indigenous contexts. Barriers to the effective use of these systems include: indicators driven by accountability, insufficient sharing of information with Indigenous communities, Western Eurocentric evaluation frameworks, and externally imposed

processes (Anderson & Smylie, 2009). Shifting the focus from an external to an internal orientation to meet the needs of students requires that postsecondary education leaders consider the worldviews of local stakeholders.

As a constructivist leader, one of my responsibilities is sharing research-informed practices with the committees to enhance educative, catalytic (enabling and empowering others), and tactical (training others) authenticity (Mertens, 2020). Examples of institutions employing qualitative methodologies to better understand student experiences include Cornell University (Meyerhoff, 2020) who used ripple-effect mapping to leverage participation and validate diverse stakeholder experiences; and, Capital University (Lynner et al., 2020) who conducted campus climate assessments using qualitative approaches underpinned by principles of critical theory. A breadth of examples that demonstrate the use of qualitative methodologies to measure mission fulfilment is provided in Appendix E. Distributing and discussing these exemplars will be a standing item on working group agendas. In the next section, I will describe the plan to communicate the need for recursive changes to Sage's mission fulfilment planning and evaluation process.

Plan to Communicate the Need for Change and the Change Process

The communication strategy for disrupting current patterns, stimulating disconfirmation—an intrinsic need for change—and building awareness of the need for change within the university is designed around the key premises of dialogic organization development (OD) theory (Bushe & Marshak, 2016). The communication strategy is a subset of the *Change Implementation Plan* (Table 11), and reflects the intent to reduce the perceived bureaucratic burden of quality assurance processes and to increase collaborative sense-making (Weick et al., 2005) through dialogue. Informal and formal conversations are the primary communication channels. Consequently, I have created numerous containers for dialogue through committee meetings, workshops, and retreats.

Table 14 details the *Communication Plan* for the change effort.

Table 14

Communication Plan

Premise of dialogic OD and goal of communication plan	Communication strategy	Key messages	Reach (audience) measure	Engagement (interaction) measure	Impact (behavioural and attitudinal change) measure	Change implementation plan phase
Reality and relationships are socially constructed; therefore, a multiplicity of diverse voices and stakeholders need to be engaged.	<ul style="list-style-type: none"> Establish working groups that have diverse representation; and, develop terms of reference and embed PEAQC principles. 	<ul style="list-style-type: none"> This is an institutional priority. It aligns with the institution's values of inclusion and diversity. 	<ul style="list-style-type: none"> Number of people invited to join a working group Number of volunteers Diversity of representation 	<ul style="list-style-type: none"> Attendance rate Retention rate Observable active participation 	<ul style="list-style-type: none"> Extent of adherence to PEAQC Principles Spread of social networks and communities of practice, internal and external to the organization 	Phase 3.a.
Organizations are meaning-making systems; therefore, change is defined through social interactions, conversations, and agreements (which are open to many interpretations).	<ul style="list-style-type: none"> Facilitate critical review of planning process using Lambert's (2009) list of questions pertaining to the four reciprocal processes of constructivist leadership at a monthly committee meeting. Confirm findings with Core Theme Executive Group. Facilitate annual Participatory Interpretation Activity for each committee and a joint-committee session. 	<ul style="list-style-type: none"> The committees are responsible for mission fulfilment planning, have ownership over the process, and are empowered to make changes. The collective wisdom of the group is more powerful than any one individual. 	<ul style="list-style-type: none"> Number of committee members Extent to which the committee members are representative of the student demographic (race, ethnicity, gender identity) Extent to which committee members are representative of the operational, academic, and service units 	<ul style="list-style-type: none"> Attendance rate Observable active participation Frequency of interactions (number of committee meetings) 	<ul style="list-style-type: none"> Extent to which committee members advocate for greater diversity of membership Extent to which higher status individuals set aside assumptions and listen to diverse voices Changes to committee membership if diversity and inclusion gaps are identified 	Phases 1.b. and 3.a.
Language, broadly defined, matters; therefore, change is created and sustained through the use of words, symbols, and narratives.	<ul style="list-style-type: none"> Affirm PEAQC Principles with members of the Intercultural Understanding Committee, who are mandated to advise Senate on culturally-responsive performance measurement through a SOAR analysis activity. Review and revise (as necessary) all procedural documents and reporting templates for alignment with the PEAQC principles. Knowledge mobilization through conference presentations and journal publications 	<ul style="list-style-type: none"> The PEAQC Principles align with the institution's vision and values The institution is a values-based, ethically grounded organization The mission fulfilment planning and evaluation process is evidence-based 	<ul style="list-style-type: none"> Ease that committee members can recall the descriptions of the PEAQC Principles Number of newsroom feature stories detailing examples of PEAQC Principles in action Number of knowledge mobilization activities Readability rating 	<ul style="list-style-type: none"> Open rate of newsroom feature stories Number of policies, procedural documents, and program proposals that reference PEAQC Principles 	<ul style="list-style-type: none"> Document analysis shows a shift from deficit to strengths-based narratives when describing learner equity gaps Degree of transparency of communications Degree of alignment between institutional policies and procedures with the PEAQC Principles 	Phase 2.a. and 4.b.

Premise of dialogic OD and goal of communication plan	Communication strategy	Key messages	Reach (audience) measure	Engagement (interaction) measure	Impact (behavioural and attitudinal change) measure	Change implementation plan phase
Creating change requires changing conversations; therefore, change occurs when everyday conversations are altered (changing who is in conversation with whom and what is being talked about).	<ul style="list-style-type: none"> Build a collaborative culture using a three-tiered approach (Appendix H). Mission fulfilment planning is a standing agenda item for all committee meetings. The QA practitioner provides monthly updates on the progress of the working groups. 	<ul style="list-style-type: none"> Everyone is responsible for student success Understanding the diversity of students' lived experiences requires inclusive decision-making processes Mission fulfilment planning is an iterative, ongoing process 	<ul style="list-style-type: none"> Map of the connections/ communication channels between reported results and stakeholders who have the power to influence change. <i>Levels of Participation</i> diagnostic assessment (Hoare & Goad, 2021a) 	<ul style="list-style-type: none"> Attendance rate Retention rate Observable active participation 	<ul style="list-style-type: none"> Analysis of meeting minutes shows a greater diversity and number of perspectives and recommendations for improvement Document analysis shows a balance of storytelling, culturally relevant metaphors, and oral histories with quantitative metrics Input from students is actively sought 	Phases 3.a. and 4.c.
Groups and organizations are continuously self-organising; therefore, the QA practitioner may accelerate or disrupt normal processes, but they cannot unfreeze and refreeze them.	<ul style="list-style-type: none"> Provide committees with professional development opportunities for equitable assessment practices and principles-focused evaluation, including cultural competence and anti-deficit methods. 	<ul style="list-style-type: none"> <i>Culturally-responsive performance measurement</i> is an ongoing, iterative process that requires lifelong learning 	<ul style="list-style-type: none"> Number of people invited to attend a workshop or webinar Number of articles, stories, or exemplars shared with committee members 	<ul style="list-style-type: none"> Attendance rate Open rate Re-share rate 	<ul style="list-style-type: none"> Extent to which committee members show initiative by applying principles learned beyond mission fulfilment planning to other operations within the university. Knowledge transfer can be collected by polling committee members annually in June. 	Phase 1.b.
Transformational change is more emergent than planned; therefore, disrupting current patterns and engaging people to uncover a collective intent/shared motivation is required.	<ul style="list-style-type: none"> Host retreat with the four university committees to explain principles-focused evaluation, and review (and revise, if necessary) the PEAQC Principles. Submit memorandum to university's governance process in order to seek Senate and Board of Governors approval of PEAQC Principles. Student success stories are shared with Senators and Governors to help them understand how the principles work in practice. 	<ul style="list-style-type: none"> There are alternate ways to measure and evaluate student success beyond Western Eurocentric models Existing postpositivist methods are limiting and do not capture the strengths of underserved learners A contextualized approach shows how student experiences are not homogenous 	<ul style="list-style-type: none"> Number of senior leaders who are informed about the potential for alternate methods 	<ul style="list-style-type: none"> Number of Senators and Governors who vote in favour of adopting the PEAQC Principles 	<ul style="list-style-type: none"> Extent to which senior leaders, Senators, and Governors seek out (ask for, require, expect) qualitative measures for other institutional reporting processes Document analysis shows a trend towards inclusion of student narratives and stories that accompany quantitative metrics in institutional, departmental, and unit strategic plans 	Phase 2.a.

Note. The key premises of the dialogic OD mindset are modified from Bushe and Marshak (2016, pp. 17-18).

The goals for the plan stem from key premises of dialogic OD theory and the communication strategies follow principles of inclusive and constructivist leadership. For example, by establishing permanent working groups, I will create webs of inclusion (Helgesen, 2005) with the potential to broaden social networks, elicit active participation, and build leadership capacity for a principles-focused approach to evaluation.

The key messages detailed in the *Communication Plan* centre on embedding the principles and change practices into Sage's institutional fabric thereby bringing coherency and legitimacy to the committees' efforts to improve institutional effectiveness and student success. The primary audience identified for the *Communication Plan* (Table 14) is members of the university committees responsible for mission fulfilment planning and evaluation at Sage.

A key principle of inclusive leadership is open communication whereby information is shared freely. Hoare and Goad's (2021a) research showed that perceptions of participation in North American postsecondary institutions vary across stakeholder groups (administrators, faculty, students) and within groups. For example, when asked "Whose interests are considered in goal-setting at your institution?" participants noted numerous conditions, including financial, power dynamics, and cultural assumptions, which can derail inclusive decision-making structures (Hoare & Goad, 2021a). Therefore, as an inclusive leader, I will measure the success of the *Communication Plan* (Table 14) with respect to reach (audience), engagement (interaction), and impact (behaviour and attitude) (Girardin & Ilsen, 2014).

Reach

Reach measures can provide useful information for assessing the level of participation of members of the four university committees responsible for Sage's mission fulfilment planning, as well as potential barriers to accessing information. An emerging, yet untested diagnostic tool for assessing levels of participation (Hoare & Goad, 2021a), provides a promising method for auditing key points during implementation of the change effort to explore who has or does not have influence and who is

and who is not included. The tool delineated six levels of participation from *0: Institution*—deidentified, depersonalized, and passive engagement—to *5: Inclusion*—collective sense-making and power in decision-making—that draw attention to ways in which institutions may be inadvertently privileging one level at the expense of others (Hoare & Goad, 2021a).

Current practices involving lengthy, jargon-heavy reports filled with dense data act as barriers to participation and understanding resulting in unintended inequities in quality assurance processes (Davidson, 2013; Kim, 2018). This should be concerning to quality assurance practitioners because language can shape reality (Manning, 2018). Quality assurance practitioners should be mindful of overusing technical jargon because, as Chen (2018) admonished, “I cannot stress enough how important it is to recognize that exposure to terminology doesn’t mean lack of ability to understand” (para. 5). One way to address this is to test the readability of reports using one of a number of free readability tools online.

Faculty and staff at Sage persistently lament the bureaucratic burden of quality assurance processes, which can be attributed, in part, to information overload. Weick and Sutcliffe (2005) identified six inputs and subsequent outputs that contribute to information overload, such as collecting and hoarding information without a clear rationale for its purpose. This excess load is common in postsecondary institutions where we see a wealth of data collection, but a dearth of data analysis that translates to deep insight and wisdom (Spitzer, 2007). Collective sensemaking can alter the perception of information overload so that individuals feel a greater capacity to take on and understand excess information through action and enactment (Sutcliffe & Weick, 2008); therefore, opportunities for facilitated collaborative data analysis are built into the *Communication Plan* (Phases 1.a. and 3.a).

The perception of needless bureaucracy can be addressed by following Weick’s (2009) theory of distributed sensemaking, which offers useful guidance for communicating the change practices clearly and persuasively to relevant audiences by prioritizing distributed cognition, “the degree of intelligence

manifest by a network of nodes... determined by the quality, not just the quantity of its interconnectivity” (Taylor & Van Every, 2000, p. 213). A cautionary note, the structure of networks, such as the university committees and working groups, can produce ignorance, tunneling vision, or normalize unexpected outcomes (Weick, 2009). To counteract this, reciprocal interdependence—inquiry, argumentation, and deliberation—is built into the *Communication Plan* (Table 14) through facilitated dialogue and a diversity of participants involved in the change (Phases 2.a., 3.a., 4.c.). Weick’s (2009) theory showed that the strength of the communication strategy is tightly linked to how the social dimension of sensemaking is organized, thus calling attention to the roles of the change leader, the university committee members and working groups, and Sage’s governance structure.

One common theme throughout the literature on university committees, culturally-responsive evaluation, and professional learning communities is the necessity for dialogue. Dialogue in this sense refers to a groups’ ability to reach a participatory consciousness (Bohm, 1996/2013) or shared content, which is only possible when participants suspend their assumptions and see one another as human beings rather than objects. Bohm argued that an organization’s ability to address inequities requires that marginalized voices are part of dialogue; therefore, a critical aspect of the *Communication Plan* includes measuring reach by mapping the interconnections and communication channels between reported results and stakeholders who have the power to influence change to determine whether gaps exist.

Engagement

Engagement measures are concerned with the frequency and mode of audience interaction. Cultural norms of compliance and a low sense of agency result in the perception of quality assurance processes as an event, a moment in time to be forgotten once complete, rather than a continuous and ongoing reflexive process. However, transformational change is more emergent than planned (Bushe & Marshak, 2016). Change necessitates “frequent local interactions” (Stacey, 2015, p. 157) to listen and

clarify to achieve a shared intent. To ensure frequency of communications, I have included mission fulfilment planning as a standing item on the four university committees' monthly agendas. Each month, I will provide progress reports of the working groups, as well as share educational resources. This also provides an informal pulse check to gauge committee members' interpretation of the change effort and to mitigate misunderstandings.

Finally, disrupting current patterns and engaging people to uncover a collective intent and shared motivation is required. Consequently, the *Communication Plan* includes a formal process for approving the PEAQC Principles (Phase 2.a.) thereby embedding the work in institutional policy. Simple metrics can be used to track collective intent, such as meeting attendance and retention rate. More complex qualitative measures can be used to track shared motivation and active participation, such as changes in the observable evidence of committee culture, the baseline for which was documented in Chapter 1 (Table 1).

Impact

Impact measures focus on the extent or degree to which the change practices shift stakeholders' behaviour and attitudes. Assessing impact goes beyond measuring stakeholders' awareness of the change to instead measuring *salience*, the belief that the change is important and urgent (Asibey Consulting, 2008). This can be captured by the visibility of the change relative to other issues in the organization. For example, the extent to which senior leaders, senators, and governors seek out and expect qualitative measures for other institutional reporting processes is one way to measure impact of the change effort and communication plan.

Another way to measure impact is to assess committee members' level of self-efficacy. This refers to their belief in their own capability to adhere to the PEAQC Principles, to adapt, and learn. As a constructivist leader, I have prioritized opportunities for intentional collective learning in a supportive environment. Norms of collaboration and democratic participation have been shown to improve

professionalism and efficacy within educational environments (Hord, 2004). Behavioural intention, a willingness to do things differently, can also be used to measure impact (Asibey Consulting, 2008). For example, the extent to which committee members show initiative by applying principles learned beyond mission fulfilment planning to other operations within the university demonstrates that the message has been internalized.

Audience

The *Communication Plan* (Table 14) also incorporates opportunities to address stakeholder concerns. Anticipating resistance, both overt and covert, will help address a key component of this problem of practice—academics' resistance to quality assurance processes. This resistance results from quality assurance systems that fail to address the values of its constituents rather than reflecting the organizational context, cultures, and unique institutional vision, mission, and values (Hoare & Goad, 2020; Kim, 2018). Consequently, viewing the problem of practice from an interpretivist cultural lens illuminates ways in which cultural orientations influence preferences, perspectives, biases, and ways of being and doing. Quality assurance practitioners must be especially cautious of the lens that they use for evaluation purposes because this determines what they see (Corrigan, 2018). As an inclusive leader, this requires that I reflect on the role of culture in maintaining social systems, including the ongoing impacts of Western evaluation methodologies on historically marginalized communities (BC Office of the Human Rights Commissioner, 2020).

As an inclusive and constructivist leader, I am attentive to the psychological and emotional needs of stakeholders by addressing three key elements of motivation that Pink (2010) identified as impacting internal drive and job satisfaction: autonomy, mastery, and purpose. *Autonomy* refers to individuals' need to have control over their work. By following an emergent approach to mission fulfilment planning rather than prescribing static objectives, committee members are empowered to take ownership over the process. *Mastery* refers to humans' innate desire to learn and improve. By

prioritizing education and training rather than mandating a top-down approach, I am modelling a growth mindset (Dweck, 2006). Finally, *purpose* refers to a desire to be part of something bigger than we are. By emphasizing a principles-focused approach to mission fulfilment planning and amplifying students' lived experiences, committee members contribute to fostering a place of belonging at Sage.

Table 15 outlines anticipated stakeholder concerns, which includes: workload, validity of qualitative measures, and committee efficacy. In addition, Table 15 identifies mechanisms for addressing stakeholder resistance that are grounded in research-informed practice, build leadership capacity through collaborative learning, and emphasize the values of the university. Proactively considering stakeholder concerns will increase the likelihood of success of the change effort, as well as honour the relational and reciprocal aims of inclusive leadership.

Table 15

Anticipated Stakeholder Concerns

Concern	Mechanism for addressing stakeholder resistance	Communication strategy
Workload: limited capacity to take on additional work	<ul style="list-style-type: none"> • Emphasize and provide evidence of impact on student success • Aim for effectively structured and facilitated use of meeting time that capitalizes on relational energy • Prioritize conversations and dialogue over written reporting 	Committee and working group meetings
Validity of qualitative measures: quantitative bias surrounding performance measurement	<ul style="list-style-type: none"> • Provide evidence-based examples, both practical and theory-based • Emphasize a principles-focused approach to evaluation • Describe limitations of quantitative metrics and SMART Goals 	Workshops, webinars, and shared articles
Committee efficacy: confidence in capacity to implement qualitative measures	<ul style="list-style-type: none"> • Provide exemplars and practical application demonstrating value-added (Appendix E) • Provide education and training to build capacity of committee members • Model a growth mindset (Dweck, 2006) • Encourage knowledge mobilization activities 	Committee and working group meetings, workshops, webinars, and retreats

The *Communication Plan* is designed according to the key premises of dialogic organizational development theory and therefore prioritizes collective sense-making through informal and formal conversations that take place amongst committee members during regularly scheduled committee meetings. Communication strategies focus on reach, engagement, and impact measures to ensure sustained interactions and multiple feedback loops for tracking progress and clarity of the key messages.

In the next section, I will discuss next steps and future considerations for improving upon the theory of action model for culturally-responsive performance measurement, including its potential utility in alternate domains.

Next Steps and Future Considerations

Throughout the writing of this organizational improvement plan, I wrestled with choosing an appropriate lens for viewing the problem of practice. Ultimately, I selected a lens that was relevant to my scope of influence and which sought to *understand* rather than to *deconstruct*. The benefits of studying Sage's organizational culture from an interpretivist paradigm is threefold: (1) it centers the co-construction of multiple realities, (2) it broadens our understanding of contextual elements of postsecondary institutions and, (3) it balances the inclusion of multiple perspectives, both internal and external to the university.

An interpretivist cultural lens provides a framework for understanding what is assumed or claimed at Sage about the people and things needing improvement, and how cultural norms can act as a barrier to inclusion of underrepresented voices. However, future considerations should be given to analyzing this problem of practice from different epistemological (nature of knowledge), ontological (nature of social reality), and axiological (nature of ethics) perspectives. Therefore, one question for future research is: Does a transformative or postmodernist lens offer additional insights for improving the proposed theory of action model?

In addition, future considerations should assess the transferability of the theory of action model for culturally-responsive performance measurement. This organizational improvement plan focused on an institutional-level process; however, success will ultimately require equitable assessment practices at the program-level, as well. Therefore, an emerging question to address is: Can the model be applied to other evaluation practices at Sage, such as academic program review, departmental review, curriculum development, and assurance of learning?

Finally, this line of inquiry should explore the linkages between equitable evaluation practices and educational policy development both internal and external to the organization. Consequently, a third question to explore is: Can the principles and components of the model be embedded in policy external to the organization, such as the provincial accountability framework or the accreditor's standards? I expand further upon these lines of inquiry below.

Postmodern Frameworks

Language and communicative tools are powerful symbols in the postsecondary education sector. These symbols—cap and gown, ivory tower, sage on the stage—influence reputation and consumer motivation. Postmodernism offers a critical lens for unpacking the potentially deleterious influence of these traditional symbols. Postmodernists reject language, naming, and symbolic representation, images that help us to negotiate our way through the world, but mask parts of reality, and ignore or discount the lived experiences of the nondominant culture (Chia, 2005). A postmodernist lens allows for contextual and individual differences in resulting social phenomena rather than seeking an objective, universal truth. Therefore, a postmodernist lens may offer valuable insights into interpreting the language of mission fulfilment planning at Sage, and who is excluded from images of student success.

Fine (2017) demonstrated the utility of a postmodern lens for illuminating the discrimination of marginalized youth in public schools by drawing upon “feminist, Marxist, critical race, and post-colonial” (p. x) theories and participatory action research methods. Furthermore, Fine (2017) and colleagues described ways to empower students and build research capacity through “justice of participation” (p. 110). Participatory action research methodologies are a dramatic shift from the postpositivist norms of postsecondary education performance measurement; consequently, the application of critical participatory action research methods at the institutional-level would require a transformative paradigm shift at Sage.

Another promising method for future exploration is Smith's (2005) mode of inquiry informed by sociology and feminist standpoint theory (Harding, 1988), which aimed to recognize social relations, both local and extra local, that affect structural processes within organizations. Smith's (2005) institutional ethnography mapped local experiences to broader societal structures (e.g., ruling relations, economy, politics) and their intersections, in an effort to bring light to otherwise invisible connections. This approach provides deep insight into how contextualized nuances are influenced by broader forces and offers a method for identifying potential points of intervention as part of a holistic performance measurement system.

The becoming orientation of postmodernists (Chia, 2005) aligns with the continuous quality improvement paradigm of quality assurance, which assumes that organizations are in constant flux. Postmodernism provides a theoretical foundation for questioning Western Eurocentric models of evaluation based on past practice in which theory was positioned by a "white, male, heterosexual, academically educated, Eurocentric majority context... that is, the invisibility of majority privilege" (Kirkhart, 2010, p. 402). Alternatively, program evaluation scholars advocate for contextualized, culturally appropriate performance measurement systems, in which validity requires congruence between theory and context, strengths-based approaches to evaluation, and situational responsiveness, such as cultural ceremonies and protocols relevant to local communities, and relational and reciprocal approaches. Therefore, it behooves postsecondary education leaders to be responsive to modern evaluation practices.

Transferability

Guba and Lincoln (1989) described *transferability* as the qualitative equivalent to external validity (generalizability), which allows others to determine the applicability of the research findings in similar situations. While I did not explicitly draw the link between mission fulfillment planning and educational policy at Sage beyond changes to the Intercultural Understanding Committee's terms of

reference there is potential to formally embed intercultural approaches into educational policy, in particular the university's academic program review policy.

Public policy is integral to ensuring there is a diversity of postsecondary institutions to serve the needs of diverse regions and student demographics. However, regulation, legislation, accreditation, and ranking systems result in homogenous institutions (Hazelkorn & Huisman, 2008). This is concerning because the dominant discourse evident in funding systems and evaluation mechanisms reinforce existing patterns of thinking and doing, which stifles diversity and compromises mission differentiation. Therefore, postsecondary education leaders must advocate for new standards of evaluation and judgement. The theory of action model for culturally-responsive performance measurement may offer one such tool for diversifying existing models and ways of thinking about student success.

Summary

Chapter 3 detailed a comprehensive plan for actualizing the theory of action model for culturally-responsive postsecondary performance measurement. The plan detailed three phases to be completed within one year's time, and a fourth phase to ensure an ongoing, reflexive, and sustainable process for improving Sage's mission fulfilment planning and evaluation process.

Embedded within the change implementation plan are opportunities for monitoring and evaluating adherence to the PEAQC Principles (Appendix C) and the resultant impact on student success, as well as reach, engagement, and impact measures, both quantitative and qualitative, to provide formative assessment for continuous quality improvement. In addition, the plan is attentive to stakeholder needs—autonomy, mastery, and purpose—and proactively addresses stakeholder concerns in anticipation of overt and covert forms of resistance to resolve incongruencies between the change effort and Sage's organizational culture.

Conclusion

This organizational improvement plan was designed to improve mission fulfilment planning and evaluation processes at a Western Canadian open access university by embedding contextualized performance measures into institutional operations. Dominant evaluation methods were critiqued and the interrogation concluded that Western evaluation methods are a poor match for the communities served by a university with a high percentage of rural, Indigenous, and international learners.

The change leader, the university's quality assurance practitioner, is perfectly situated between management and academics to enable collaborative, inclusive decision-making processes to generate the collective wisdom required to respond to this call to action—a need for more culturally-responsive performance measurement. The change leader was guided by an epistemological position that assumes social and historical factors shape how student success is defined and measured in the postsecondary education sector. An interpretivist cultural position values qualitative and subjective inquiry as a mechanism for understanding the attitudes and experiences of diverse student populations. Therefore, the change leader selected a trio of change practices for addressing the problem of practice composed of three relational and reciprocal change efforts: (1) build a collaborative culture of inquiry, (2) co-create institutional knowledge with students, and (3) advocate for institutional investment in qualitative data analysis.

The plan detailed five recommendations for culturally-responsive performance measurement. First, I recommended that Sage require participatory, inclusive performance measurement systems, that actively engage people who have the authority to act on the decisions and the resources needed to influence change with the expertise—both theoretical and experiential—and members from the communities the institution serves. Second, I recommended that Sage accommodate emergent, adaptive, and generous timeframes for reporting that meet the needs of the communities the institution serves. Third, I recommended that Sage require appreciative, strengths-based discourse that situates

the problem within the systems rather than within individuals, and review all reporting documents for culturally appropriate, anti-deficit language. Fourth, I recommended that the university encourage the use of qualitative methodologies for measuring institutional effectiveness and student success that complement commonly used quantitative measures. Finally, I recommended that Sage monitor the catalytic capability of performance measurement systems for improving student success.

A values-based change implementation plan was described as an alternative to functionalist models, such as Deming's (1993) Plan-Do-Study-Act and SMART goals (Doran, 1981). Models based on market logics of performance, self-interest, efficiency, and data that illustrate return on investment are in opposition to logics of teaching and learning, which prioritize quality, development, and continuous improvement (Brown, 2017).

Alternatively, principles-focused evaluation (Patton, 2018) was offered as a non-linear, highly individualized evaluation method that builds upon the university's core values of diversity and inclusion, community-mindedness, curiosity, and sustainability. By examining both process and outcomes, and honouring narratives and stories as essential to making sense of the past, present, and future (Murphy, 2018), principles-focused evaluation forefronts relationships and learning.

In conclusion, this metaevaluation examined the relevance of dominant evaluation methods, and offered numerous examples of organizations and scholars paving the way towards more culturally-responsive postsecondary performance measurement. With this organizational improvement plan, the change leader and university have the potential to positively influence student success, regardless of the multiple and differing definitions of student success present at the university.

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Appendix A: Comparison of Provincially Mandated Institutional Priorities

Social Justice Orientation <-----> Market Orientation							
Year	Student Safety	Vulnerable & Underrepresented Domestic Students	Indigenous Students	Access & Affordability	Environmental Sustainability	Neoliberal Logics	International Students
2014/15			participation and success	open education resources; tuition limit policy; faculty and students to study and work abroad		seamless education and training from high school to workforce; programming meets needs of students; graduate targets meet labour market needs; minimize overhead costs, consolidate functions where appropriate; balanced budget; freeze on executive and management compensation	retention and recruitment of international students
2015/16			participation and success			students transition into the workforce into jobs most in demand in the province; administrative efficiencies; balance or surplus budget; freeze on executive and management compensation; operational and financial activities are cost-conscious and most cost-effective use of taxpayer resources	
2016/17			participation and success			deepen BC's talent pool in the technology sector; <i>Skills Gap Plan</i> ; maximize efficient use of administrative resources; freeze on executive and management compensation; cost-conscious use of taxpayer resources; balance or surplus budget	advance two-way flow of international students
2017/18	promote safe campuses by developing policies and actions to prevent and respond to sexual misconduct and assault		participation and success	develop and promote use of online resources and open textbooks	help to achieve goals identified in BC's Climate Leadership Plan	deepen BC's talent pool in the technology sector; support Skills Gap Plan; maximize efficient use of administrative resources; Ensure cost-conscious use of taxpayer resources; balance or surplus budget	advance two-way flow of international students

Social Justice Orientation <-----> Market Orientation							
Year	Student Safety	Vulnerable & Underrepresented Domestic Students	Indigenous Students	Access & Affordability	Environmental Sustainability	Neoliberal Logics	International Students
2018/19	improve student mental health, safety and overall well-being including greater awareness of available supports	implement tuition-free Adult Basic Education and English Language Learning for domestic students; improve education success of former youth in care and implement the tuition waiver program	actively participate in process to develop a comprehensive post-secondary strategy that responds to the TRC Calls to Action and UNDRIP	comply with 2% tuition cap and mandatory fees		expand technology related programming to grow the knowledge-based economy; <i>EducationPlannerBC</i> , a common application system for all undergraduate applicants	balanced approach to international education
2019/20	improve safety and overall well-being in the areas of mental health and prevention of sexual violence and misconduct	increase access to education with a focus on vulnerable and under-represented students	implement the educated-related TRC Calls to Action; comprehensive strategy that increases student success and responds to TRC Calls to Action and UNDRIP	ensure seamless transition into post-secondary education from high school; tuition limit policy and mandatory fee increases for domestic students		expand programming related to high-demand occupations and priority sectors; expand co-op and work-integrated learning opportunities for all students; <i>EducationPlannerBC</i> , a common application system for all undergraduate applicants; balance or surplus budget	balanced approach to international education
2020/21	ensure student safety and inclusion	implement initiatives to increase participation and success of students including vulnerable and under-represented groups, promoting gender parity	support lasting reconciliation with Indigenous peoples through initiatives that increase participation and success; implement the education-related TRC Calls to Action	flexible lifelong learning pathways; expand dual credit opportunities; open learning resources		programming meets local, regional or provincial labour market and economic needs; align programming with high priority occupations; increase co-op and work-integrated learning opportunities; reskilling needs of BC; support students' awareness of career planning resources; enhance system innovation through participation in a post-secondary digital system strategy	student-centred international education framework that supports the success of domestic and international students

Note. The table shows the key priorities outlined in Sage’s mandate letter across a seven-year period (2014/15 to 2020/21). The table header displays eight broad categories on a social justice and economic orientation continuum. Each cell includes the strategic priorities mandated by the Ministry. Data from Sage *Mandate Letter* (Government of British Columbia, n.d.c).

Appendix B: BC Accountability Framework: Performance Measures

Social Justice Orientation <-----> Market Orientation								
Year	Student Safety	Vulnerable & Underrepresented Students	Indigenous Students	Access and Affordability	Environmental Sustainability	Fiscal Responsibility	Neoliberal Logics	International Students
2014/15			# of FTE enrolments delivered in all program areas	# of FTE student enrolments delivered overall and in developmental program areas (ABE, ESL)		Audited financial statements	# of FTE student enrolments delivered overall and in designated program areas, average # of credentials awarded; % of graduates who were unemployed at the time of the survey, compared with the % of BC unemployed individuals with high school credentials or less; % of former students who were very satisfied or satisfied with the education they received; % of students who rated the quality of instruction in their program positively; % of students who indicated their education helped; % of employed graduates who indicated the knowledge and skills they acquired through their education were useful in performing their job	
2015/16			no change	no change		no change	no change	
2016/17			no change	no change		no change	no change	
2017/18			no change	no change		no change	no change	
2018/19			no change	no change		no change	no change	
2019/20	student consultation		In addition: credentials awarded	In addition: % of high school graduates that enter a public post-secondary institution within 3 academic years of graduation, participation rate (% of BC pop. aged 18-24 years who were enrolled in post-secondary education), median monthly loan repayment as a % of median monthly income for employed students with debt at time of leaving their institution, undergraduate tuition and fees as a % of median household income; first year retention rate		no change	In addition, total sponsored research funding awarded from the federal government, provincial government and other sources; time to completion	

Note. Data from Government of British Columbia (n.d.a) *Accountability Framework*.

Appendix C: PEAQC Principles

PEAQC PRINCIPLES

FOR CULTURALLY-RESPONSIVE POSTSECONDARY
PERFORMANCE MEASUREMENT

PARTICIPATORY

Data is meaningful when defined by the user. Evaluation committees consist of culturally diverse academic peers and stakeholders with cultural competence.



EMERGENT

A contextualized approach is often emergent with generous time-frames. Evaluation windows for qualitative methodologies allow for longitudinal studies and extended reporting cycles.



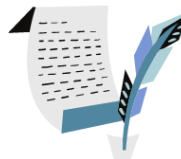
APPRECIATIVE

Culturally responsive interpretation and communication of research results builds on learners' strengths. Evaluation committees use anti-deficit/strengths-based approaches, are attentive to relationships, and aware of insider-outsider complexity.



QUALITATIVE

Performance indicators are most reliable and valid when assessed as a collection of diverse data sets. Evidence portfolios include both quantitative and qualitative measures.



CATALYTIC

Effective evaluation processes lead to improvement through action. Inquiry leads to action and informs programming that supports student success.



Appendix D: University Committee Resource Calculation

4 University Committees

20 members Sustainability

20 members Research

24 members Student Success

17 members Intercultural Understanding

81 faculty, staff, and students*

*Some duplication across committees exists, e.g., QA practitioner

Monthly meetings September – June

1.5h meeting

1.5h prep

3h x 10 months = 30 hours

30h x 81 committee members = 2,430h

+ 1 working group per committee

4 committees x 8 members

32 members x 10 mtgs x 2h (1h mtg + 1h prep) = 640h

+ 1 executive mission fulfilment planning group

12 members x 5 mtgs x 2h = 120h

2,430h + 640h + 120h = **3,190h**

= 455 days (7 hours/day)

= 91 weeks (5 days/week)

= **23 months** (4 weeks/month)

Note. The mission fulfilment planning and evaluation process equates to roughly two full-time employees on an annual basis. If conducted efficiently, Sage's university committees have the time and human resources to influence change. If done poorly, they represent a serious missed opportunity.

Appendix E: Complementary Quantitative and Qualitative Measures of Success

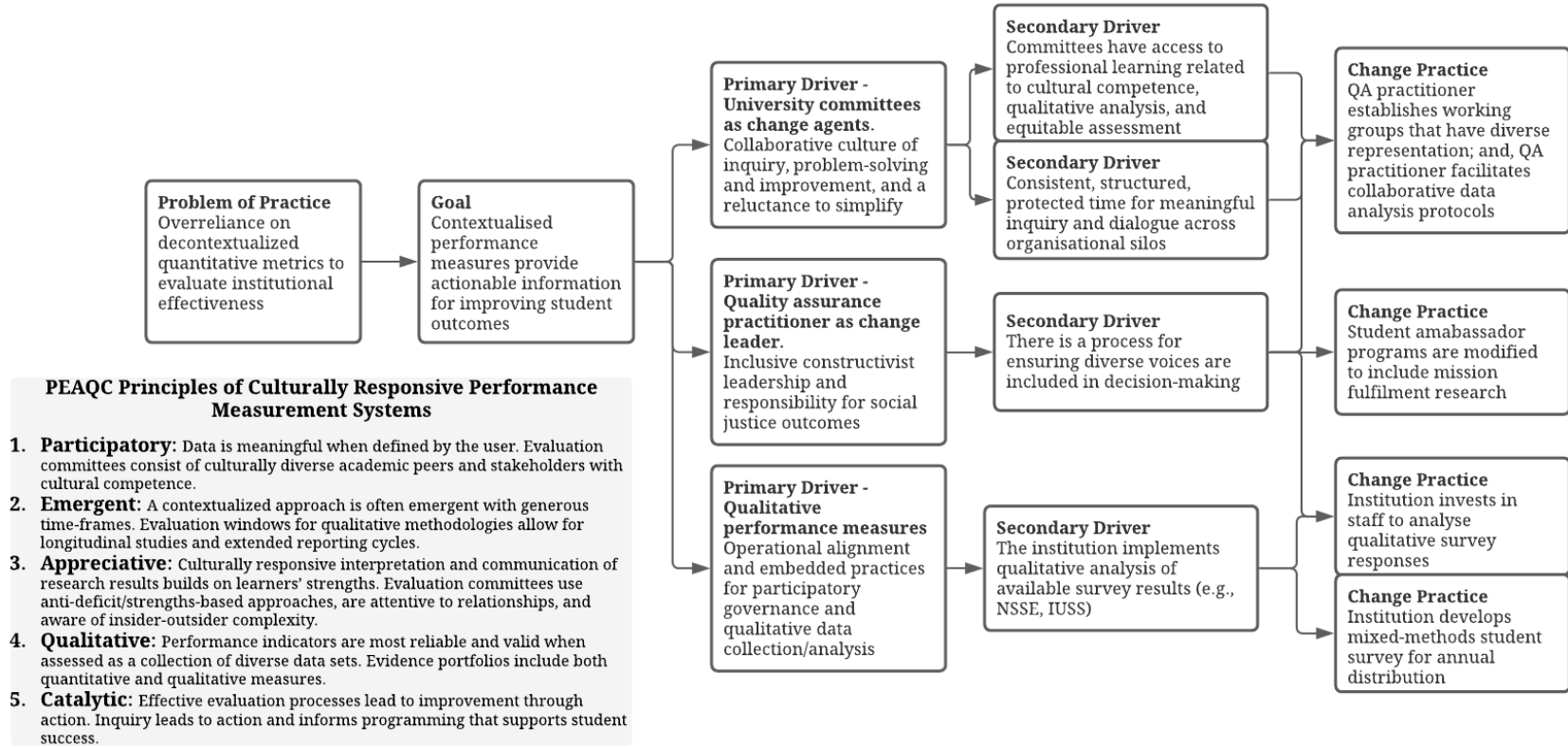
Purview (Focus)	Quantitative Metric	Qualitative Indicator	Example-Type (Source)
Accreditor (Standard)			
The institution articulates its commitment to student success, primarily measured through student learning and achievement... with a focus on equity and closure of achievement gaps	Retention rate disaggregated by race, ethnicity, age, gender, socioeconomic status, first generation college student, and any other institutionally meaningful categories	Indigenous student perceptions of available support services for improving retention, as evidenced by student responses to an open-ended survey question: "What can the university do to improve the recruitment, transition, retention, and completion rates for Indigenous learners".	National survey (Indigenous Undergraduate Student Survey, n.d.; Chambers, 2010)
		Reduction in barriers to accessing education as demonstrated through themes that emerge through student stories using Indigenous Talking Circles methodology.	Community research (First Peoples' Postsecondary Storytelling Exchange, 2021)
	Persistence rate disaggregated by race, ethnicity, age, gender, socioeconomic status, first generation college student, and any other institutionally meaningful categories	Student sense of belonging as described through narratives of success and challenges; and, best practices that foster community, strengthen cultural values, and lead to knowledge sharing.	Institutional program/initiative (Helena College, n.d.)
		Trajectory of BIPOC (Black, Indigenous, People of Colour) learners and their ability to overcome barriers that typically disadvantage their peers.	Faculty research (Harper, 2007)
		Impact of intrusions of work/life commitments on student experiences in the classroom through combination of quantitative survey and cognitive/identity mapping techniques.	Faculty research (Greene & Sanchez, 2018)
Graduation rate disaggregated by race, ethnicity, age, gender, socioeconomic status, first generation college student, and any other institutionally meaningful categories	Perception of class experiences of domestic and international students, as evidenced by interviews and diary entries.	Faculty research (Grayson, 2008)	
	Value of a professional program, as demonstrated by a positive or negative sentiment in response to the question: What has been the most positive/negative part of your study experience in your program up to now?	National survey (Canadian Association for Graduate Studies, n.d.; Grebennikov & Shah, 2013)	
Employment rate disaggregated by race, ethnicity, age, gender, socioeconomic status, first generation college student, and any other institutionally meaningful categories	Knowledge, attitudes, and practices of students related to school-to-career opportunities in their transition from post-secondary to the workforce based on Talent Development evaluation, a mixed-methods evaluation approach that includes interviews, written assessments, and surveys.	School program (Manswell Butty et al., 2004)	
Institution (Mission, Core Themes, Strategic Change Goals)			
Eliminate achievement gaps. All groups in our region – including Indigenous and rural learners – will achieve in higher education on par with others.	Retention, persistence, graduation and employment rates disaggregated by Indigenous, BC rural, and non-Indigenous	Mitigation of student mental health problems informed by responses to the question: What could we do to improve Indigenous services, facilities, or events at the university?	National survey (Indigenous Undergraduate Student Survey, n.d.)
		Reduction of social and physical barriers in the campus environment that prevent students with disabilities from achieving positive outcomes in higher education, as evidenced by participatory action research Photovoice methodologies.	Institutional program/initiative (Agarwal et al., 2015)
	Dimensions of access to knowledge versus access to success, which consider the conditions necessary for success, including housing and food insecurity; and, financial, familial, and emotional struggle.	Faculty research (McCormack et al., 2014)	
	Faculty, students, staff, and administrators understand the unique perspectives of each in regard to teaching and learning expectations, impact of cultural contexts on education, and the realities of daily life impacting learning through the use of Story Circles.	Global initiative (Deardorff, 2020)	

Purview (Focus)	Quantitative Metric	Qualitative Indicator	Example-Type (Source)
We come together to help one another. Mutual benefit guides us to connect meaningfully with people in the communities we serve, contributing to an interconnected world where we all share a common future and humanity.	Community citation score (number of faculty research citations in local news sources)	Capital and knowledges gained from communal and familial experiences, as evidenced by “community cultural wealth” (Gonzalez, 2017, p. 120) through assess-mapping methodologies.	Faculty and graduate student research (Yosso, 2006; Cleary & Wozniak, 2013; Edward 1993)
	Participation rate (attendance) in intercultural, international, and Indigenous activities offered by the institution.	The impact (degree of benefit) of university activities (e.g., research, partnerships, policies, peer networks, etc.) measured through case studies, participative dialogue, and mapping reports.	Institutional program/initiative (Farnell et al., 2020)
		Faculty, staff, and students’ awareness of sociocultural diversities, including their own, as evidenced by deconstructivist work (e.g., examining institutional policies, practices, and culture).	Institutional program/initiative (Colyar, 2010)
		Students’ perception of the university as a place of belonging, as evidenced through participatory action research Photovoice methodologies.	Community project (Stack & Wang, 2018; City of Kamloops, 2020)
Impact of multicultural group work on students’ experiences and intercultural learning in the classroom, evidenced by students’ reflections.	% of undergraduate baccalaureate degree students who complete a 3-credit Indigenous Knowledges & Ways course	Social cohesion and appreciation of diversity informed by responses to the question: What specific kinds of Indigenous programs, courses, content, or Indigenous teaching models would you like to see at the university?	National survey (Indigenous Undergraduate Student Survey, n.d.)
		Indigenous students’ perception of the university as a place of belonging, as evidenced by counter-stories as representations of racialized experiences.	Institutional program/initiative (Beckert & Stevens, 2011; Hubain et al., 2016)
State/Province (Priority)			
Ensure seamless transition into post-secondary education from high school	% of high school graduates that enter a public post-secondary institution within 3 academic years of high school graduation	Student experiences navigating the transition to post-secondary (e.g., admissions processes, financial barriers, family responsibilities, etc.), measured through journey mapping techniques.	Faculty research (Andrews & Eade, 2013; Hamshire et al., 2017)
Increase Indigenous students’ participation and success	# of FTE enrolments of Indigenous students delivered in all program areas	Impact of student engagement in different learning situations, measured through ripple effect mapping.	Institutional program/initiative (Meyerhof, 2020)
Ensure educational programming meets local, regional or provincial labour market and economic needs	# of FTE student enrolments delivered in designated program areas (e.g., nursing and allied health, early childhood education, engineering)	Employer expectations regarding graduate attributes and graduate career readiness, measured through qualitative interviews with employers of various fields.	Faculty and graduate student research (Hoare & Hu, 2017)
	% of former students who were very satisfied or satisfied with the education they received	Student satisfaction with their experience at the university, as demonstrated by a positive or negative sentiment in response to the question: “Looking back on your experiences as a student, what aspects of your experience at this university have been most negative/positive?”	National survey (Canadian University Survey Consortium, n.d.; LeBoeuf, 2020; NSSE, 2019; NSSE, n.d.)
		Impact of community and cultural beliefs and behaviours on utility and relevance of the delivery of co-curricular and curricular programming.	Faculty research; government study (Duxbury et al., 2015; United States Government Accountability Office, 2003)

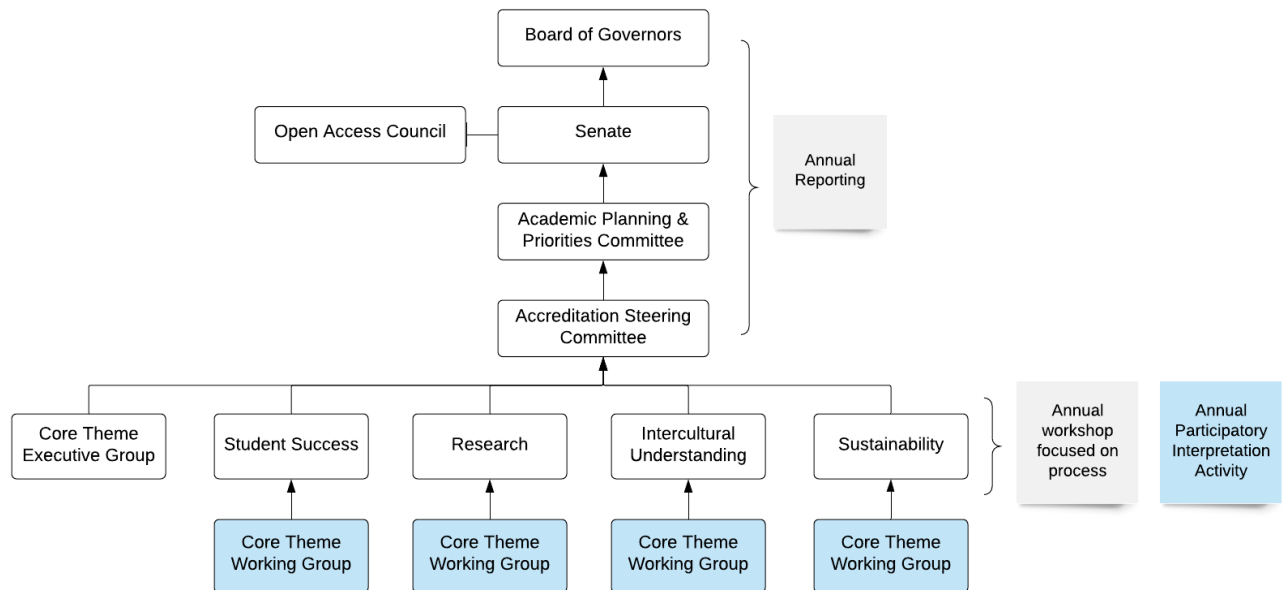
Appendix F: List of Institutional Survey Qualitative Questions

Survey	Question(s)	Reporting Cycle
National Survey on Student Engagement (Centre for Postsecondary Research, n.d.)	What has been most satisfying about your experience so far at this institution, and what has been most disappointing?	Every three years 1st and 4th year baccalaureate degree students
Canadian University Survey Consortium (CUSC, n.d.)	Looking back on your experiences as a student, what aspects of your experience at this university have been most negative? How could we have helped or done a better job? Looking back on your experiences as a student, what aspects of your experience at this university have been most positive?	Annually Cycles through 1st, middle, and graduating baccalaureate degree students
Indigenous Undergraduate Student Survey (IUSS, n.d.)	What specific kinds of Indigenous programs, courses, content, or Indigenous teaching models would you like to see at the university? What can the university do to achieve the above stated Indigenous student success goals? How could the university improve the recruitment, transition, retention, and completion rates for Indigenous learners? Which of the Indigenous services, facilities, or events were the most helpful for you and why? Which of the Indigenous services, facilities, or events were the least helpful for you and why? What could we do to improve Indigenous services, facilities, or events at the university?	Annually All students are invited to participate
Canadian Graduate and Professional Student Survey (Canadian Association for Graduate Studies, n.d.)	Are there any additional comments you would like to add about your graduate student experience at this time? Suggestions: <ul style="list-style-type: none"> • What has been the most negative part of your study experience in your program up to now? • What has been the most positive part of your study experience in your program up to now? • What advice would you give to other students planning to enroll in this program? 	Every three years Graduate students enrolled in master's degree programs
BC Student Outcomes (Government of British Columbia, n.d.b)	Do you have any further comments to add about your educational experience or your program?	Annually Alumni who completed a program at the university

Appendix G: Culturally-Responsive Performance Measurement Theory of Action Model



Appendix H: Three-Tiered Approach to Collaborative Inquiry



Note. The current governance structure for Sage’s mission fulfilment planning and evaluation process is noted in black, white, and grey. The changes, including the establishment of working groups, and facilitation of annual participatory data analysis (for *both* individual committees and a joint-committee meeting), are identified in blue.

Appendix I: Qualitative Interview Protocol

Evaluating Principle = Participatory . Data is meaningful when defined by the user. Evaluation committees consist of culturally diverse academic peers and stakeholders with cultural competence.	
Criteria for evaluation: Guiding . A principle is prescriptive. It gives advice and guidance. It provides direction.	
Interview Question	Participant Response
1. To what extent, if at all, would you say the mission fulfilment planning and evaluation process is participatory and representative of a diverse group of stakeholders comparable to the faculty, staff, and student demographics of the institution?	
2. In what ways do/don't committee chairs and the quality assurance practitioner create a climate of inclusion and psychological safety? Please provide examples.	
3. What impact (if any) has broadening participation improved communication networks and knowledge mobilization? Please provide examples.	
Criteria for evaluation: Useful . A principle should have a clear purpose, yet sufficiently general to be applicable to a range of situations.	
1. How do you facilitate participatory processes as a member of a university committee and/or working group? Please provide examples.	
2. In what ways does this principle create challenges and/or opportunities in relation to the efficacy and efficiency of mission fulfilment planning? Please provide examples.	
3. What impact (if any) has broadening participation informed improvement to support services, programs, or initiatives aimed at student success across the institution and/or within your department? Please provide examples.	
Criteria for evaluation: Inspiring . Principles are derived from the university's values, thereby incorporating and expressing ethical premises. Principles articulate what matters to the institutions and should guide and inspire actions.	
1. What is your reaction to this principle?	
2. From your perspective what values about higher education, institutional effectiveness, and student success are expressed in this principle?	
3. To what extent, if at all, do you find this principle inspiring? Why or why not?	
Criteria for evaluation: Developmental . Principles are adaptable and applicable to diverse contexts and over time; therefore, principles are enduring (not time-bound), context-specific, and adaptable to complexity.	
1. Given the requirements of externally imposed accountability frameworks, how applicable and relevant is this principle to the university's context?	
2. In what situations do you find this principle a hindrance?	
Criteria for evaluation: Valuable . It is possible to document and judge whether the principle is being followed and whether following the principle leads to desired outcomes.	
1. What evidence do you, committees, and the quality assurance practitioner collect to measure whether the university committees consist of culturally diverse academic peers and stakeholders with cultural competence?	
2. How do you know (or how might you find out) if increased participation and representation of diverse stakeholders impacts decision-making at the institutional, faculty/school, and departmental level?	
3. Can you provide an example of when knowledge gained from the mission fulfilment planning and evaluation process lead to a change in your department?	

Note. The qualitative interview protocol is a modification of Patton's (2018) *Exhibit 21.2* (pp. 182-184) and is based on the GUIDE criteria (*Exhibit 6.1*, p. 38) for evaluating principles.

Appendix J: Quantitative Rating Scale

Instructions: Based on your experience, knowledge, and perspectives as a committee member, please rate each PEAQC Principle on the 5-point scale provided.					
A. Clarity of Guidance. How clear is the guidance offered to you as a committee member? To what extent is it clear to you what you should do to follow each principle? Please check the box in each row that best fits your opinion about the clarity of each principles.					
Principles	Very clear: I know what it means	Fairly clear	Partly clear, partly vague	Fairly vague	Very vague: I'm not sure what this means
Participatory: data is meaningful when defined by the user.					
Emergent: a contextualized approach is often emergent with generous time-frames.					
Appreciative: culturally-responsive interpretation and communication of research results builds on learners' strengths.					
Qualitative: performance indicators are most reliable and valid when assessed as a collection of diverse data sets.					
Catalytic: effective evaluation processes lead to improvement through action.					
B. Utility of the Principle: How useful is the principle to you as a committee member? To what extent can you use this principle as part of your role and responsibility in mission fulfilment planning and evaluation? (Check a box)					
Principles	Very useful	Fairly useful	Somewhat useful	Not too useful	Not at all useful
Participatory: data is meaningful when defined by the user.					
Emergent: a contextualized approach is often emergent with generous time-frames.					
Appreciative: culturally-responsive interpretation and communication of research results builds on learners' strengths.					
Qualitative: performance indicators are most reliable and valid when assessed as a collection of diverse data sets.					
Catalytic: effective evaluation processes lead to improvement through action.					

Note. The quantitative rating scale is a modification of Patton's (2018) *Exhibit 21.3* (p. 185).