

Change Leadership Toolkit 2.0:

A Guide for Advancing Systemic Change in Higher Education



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EXECUTIVE SUMMARY

Higher education leadership is change leadership these days. As a result of the pandemic, the racial reckoning of 2020 and its subsequent backlash, continuously fluctuating enrollments, and increasing financial pressures, leaders are in dire need of a guide that can support them in leading systemic change. Successful systemic change in higher education involves multiple leaders at various levels across campus employing an array of specific strategies, which we call Change Leader Moves, to create change. It requires an understanding of Leadership Context and the ways that elements of context can be leveraged to promote change or navigated to overcome barriers to change. However, there have been minimal research-based tools to support leaders in planning for and implementing this type of change, and no models that connect leaders' actions with their leadership context. For these reasons, we provide this Change Leadership Toolkit. The Toolkit consists of an array of tools that were developed with higher education leaders in varying roles across numerous institutional types nationwide.

Through an iterative research process, we developed an Ecosystem Model of Systemic Change Leadership that is composed of eight Moves leaders can use to make systemic change. In addition, we outline aspects of Leadership Context that shape Leader Moves and provide opportunities and barriers to the change process, as well as Levers that can be used to amplify Leader Moves. We describe the importance that leaders' role and agency play in shaping their project's process and outcomes. This Toolkit also includes a set of worksheets that guide leaders through a Change Leader Moves Inventory, analysis of their Leadership Context and identification of Levers in preparation for creating an Ecosystem Map and a Change Leadership Plan for the change team to use to implement next steps and actions. Finally, a series of questions guides leaders through a process to Assess

Leader Moves and Process to fully support a systemic change initiative over time. In addition to the Toolkit's worksheets, we connect leaders with other existing resources that dive deeper into Leader Moves via our Case Studies and Resource Library, available on our [Pullias Center website](#).

This guidebook helps users understand the various components of the Toolkit and its application. The Toolkit provides a robust understanding of Leadership Context factors that influence systemic change and the opportunity that leaders across campus — from presidents to students, from faculty to administrators to entry-level staff — all have for driving systemic change. The worksheets and Case Studies are intended to provide concrete activities to help enable systemic change. Ultimately, we call on change agents to lean into this Change Leadership Toolkit, which serves as a foundational resource for leaders across higher education, “to deeply reflect on the changes they are proposing, to systematically analyze and design a change process that fits the institutional context in which they are located, and to engage in the challenges of creating deep change...” (Kezar, 2018, p. 246). The original CLT was published in March 2023. In this second, updated version, we offer a few revisions based on an evaluation we conducted of leaders and teams using the guidebook over the past year:

- 1. More closely aligned Lever and Context categories**
- 2. Reorganized elements of the Ecosystem Model to begin with the Moves instead of Context**
- 3. Deleted the Prioritization Worksheet and replaced with the Ecosystem Map**
- 4. Added some additional figures and graphics**

AUDIENCE

The audience for the guide is wide ranging:

- This guide is intended for leaders at all levels on campus and with varying backgrounds and experience. New staff, faculty, or administrative leaders will find this useful for understanding the basics of enacting systemic change. More experienced leaders can refresh their skills and may especially benefit from exploring the context tools and levers or accelerators of change they may not have considered before.
- Faculty leaders, department chairs, student affairs and other staff, deans and provosts will all find useful ideas that can help them in their work to execute systemic change. Even students can be included as leaders in using this guide.
- We hope that groups involved with leadership development will use this as a resource for their programs. Policy groups may use this guide as they work on institutional transformation and reform efforts.
- In addition, higher education associations, national organizations and projects, philanthropic foundations, state systems of higher education, collaborative groups focused on organizing multiple campuses, consultants working with campuses on change initiatives and funded projects, and evaluators who are engaged in national or campus-level funded change efforts may also find this Toolkit helpful in guiding leadership teams.

ACKNOWLEDGMENTS

This Change Leadership Toolkit is based on research funded by the Bill & Melinda Gates Foundation. The findings and conclusions contained within are those of the authors and do not necessarily reflect positions or policies of the Bill & Melinda Gates Foundation. This guidebook is based on a workshop of change leaders that was held using funding from the National Science Foundation (grant #2017799). Version 2.0 of the Toolkit was informed by research conducted with funding from the Alfred P. Sloan Foundation.

We also wish to acknowledge the contributions of more than 100 people representing nearly 40 campuses that participated in the project to help refine the Toolkit and served as co-authors for selected Case Studies. We commend these institutions and their leaders for their critical feedback and willingness to showcase their growth areas and successes through the Case Studies. Their support in polishing the worksheets and applying the Toolkit to their systemic change initiatives provides a wealth of knowledge for other leaders in similar roles and institutions who may face similar challenges and opportunities.

We are also grateful for the support of our various partnering national organizations, associations, and national projects that helped recruit participants to inform Toolkit development and whose leaders participated in focus groups and convenings to help refine the tools presented within this Toolkit. These organizations include: Achieving the Dream, the Association of American Universities (AAU), the Association of Public & Land Grant Universities (APLU), the APLU Network of STEM Education Centers (NSEC), the APLU Mathematics Teacher Education Partnership (MTEP), the APLU and NSF INCLUDES Aspire Alliance Institutional Change Network (IChange), the American Association for the Advancement of Science (AAAS), American Association of State Colleges and Universities (AASCU), the Bayview Alliance (BVA), the Howard Hughes Medical Institute (HHMI), the National Association of Student Personnel Administrators (NASPA), plus several more.



ABOUT THE PROJECT TEAM



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Adrianna Kezar is Dean's Professor of Leadership, Wilbur-Kieffer Professor of Higher Education and Director of the Pullias Center for Higher Education, University of Southern California. She is a national expert on change and leadership in higher education. Her research agenda explores the change process in higher education institutions and the role of leadership in creating change. Kezar's change and leadership research has been used by government agencies, accreditation bodies, foundations, state systems, consortia, and individual campuses to forward change agendas and initiatives and her leadership research has been used to design leadership development among national associations, consortia of colleges, and campus-based leadership programs. She also regularly consults for campuses and national organizations related to her work on diversity/equity/inclusion, non-tenure track faculty, STEM reform, collaboration, and governance. She is an international expert on the changing faculty and she directs the Delphi Project on the Changing Faculty and Student Success — www.thechangingfaculty.org. Kezar is well published with 23 books/monographs, over 100 journal articles, and over a hundred book chapters and reports. Recent books include: *Shared Leadership in Higher Education: Responding to a Changing Environment* (2021) (Stylus Press); *The Gig Academy* (2019) (Johns Hopkins Press), and *Administration for Social Justice and Equity* (2019) (Routledge).



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Susan Elrod is an experienced biology professor, university administrator, and national leader in STEM higher education and systemic change leadership. In addition to her former administrative position at University of Indiana South Bend, she has served in leadership positions at Cal Poly, San Luis Obispo, California State University, Fresno and California State University, Chico. She also served as the executive director of Project Kaleidoscope (PKAL) at the Association of American Colleges & Universities (AAC&U) in Washington, DC. In this position, she launched multi-campus national initiatives focused on improving undergraduate STEM education and enhanced PKAL's networking and leadership programs. She is also a co-founder of CRUSE, the Coalition for Reform in Undergraduate STEM Education, which is a consortium of national associations focused on fostering national collaborations for student success in STEM. She has over 20 publications on topics ranging from undergraduate research and to systemic change and leadership, as well as several scientific publications and patents, including her recent book with colleagues on shared leadership in higher education. She has consulted with campuses, national organizations, and state systems of higher education, and serves on the HERS Board of Directors and the editorial board of Change Magazine. She holds a PhD in Genetics from the University of California, Davis and an undergraduate degree in Biological Sciences from California State University, Chico. She was a postdoctoral fellow at Novozymes, Inc. in Davis, California and was elected as a Fellow of the American Association for the Advancement of Science (AAAS) in January 2020 for her work in STEM higher education.



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also consulted with various higher education organizations on issues related to teaching and assessment, DEI, and faculty development. Dr. Holcombe's publications include an edited book, book chapters and peer-reviewed journal articles, as well as technical reports and commentary. She has held a variety of roles in student affairs administration and was also an elementary school teacher. She holds a PhD from the University of Southern California, an MA from Teachers College, Columbia University, and a BA from Vanderbilt University.

About the Pullias Center for Higher Education

Promoting Equity in Higher Education

One of the world's leading research centers on higher education, the Pullias Center for Higher Education at the USC Rossier School of Education advances innovative, scalable solutions to improve college outcomes for underserved students and to enhance the performance of postsecondary institutions. The mission of the Pullias Center is to bring a multidisciplinary perspective to complex social, political, and economic issues in higher education. The Center is currently engaged in research projects to improve access and outcomes for low-income, first-generation students, improve the performance of postsecondary institutions, assess the role of contingent faculty, understand how colleges can undergo reform in order to increase their effectiveness, analyze emerging organizational forms such as for-profit institutions, and assess the educational trajectories of community college students.

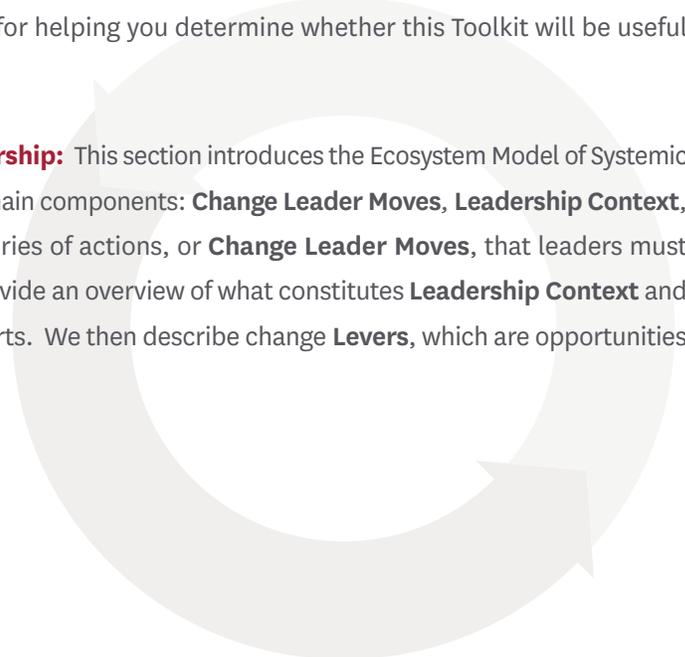
INTRODUCTION TO THE CHANGE LEADERSHIP TOOLKIT (CLT) 2.0

This Toolkit is specifically designed to facilitate successful, scalable, and sustained systemic change. We define “systemic change” as one that affects multiple courses, departments, programs, divisions, colleges (or beyond) and results in changes to policies, procedures, norms, cultures, and/or structures (organizational, curricular, fiscal).

Successful systemic change in higher education involves multiple leaders at various levels across campus employing an array of specific strategies (which we call “Moves”) to create change. It requires an understanding of leadership context and the ways that elements of context can be leveraged to promote change or navigated to overcome barriers to change. Leaders across campus — from presidents to students, from faculty to administrators to entry-level staff — all have an important role to play in driving systemic change.

In order to help those involved in systemic change efforts, we have developed this Change Leadership Toolkit with various resources to support leadership of the systemic change process. This guide includes the following sections:

- 1. Guiding Framework and Background for Change:** We begin with an overview of the systemic change and social justice framework that grounded the development of this Toolkit.
- 2. Getting Started with Systemic Change: Clarifying Your WHAT, WHY, and WHO of Change:** This section provides an opportunity to reflect on your goals and scope of change to clarify what you are trying to accomplish, ensure that it is a systemic change, and understand why this change is important. It will also help you identify who is best situated to help achieve these outcomes. Reflection questions in this section ask leaders to consider their role and agency, as well as key considerations around forming a team. This section is crucial for helping you determine whether this Toolkit will be useful in helping you meet your goals.
- 3. Overview of the Ecosystem Model of Systemic Change Leadership:** This section introduces the Ecosystem Model of Systemic Change Leadership. A synopsis of the model highlights its three main components: **Change Leader Moves**, **Leadership Context**, and **Levers** for change. We begin by outlining the eight categories of actions, or **Change Leader Moves**, that leaders must employ to create sustainable and scalable change. Next, we provide an overview of what constitutes **Leadership Context** and why considering these aspects matters for systemic change efforts. We then describe change **Levers**, which are opportunities leaders can utilize to amplify the Leader Moves.



4. Systemic Change Leadership Worksheets: This section consists of the main worksheets and tools of the Toolkit, which are designed to help change leaders develop a plan to support their systemic change initiative. While the worksheets can be used in any order, we have placed them in the order that we suggest using them for maximum impact. They are:

Change Leader Moves Inventory Worksheet: This worksheet helps you take stock of Moves you have already made.

Leadership Context Worksheet: This worksheet supports reflection around elements of your Leadership Context that can serve as barriers or opportunities to change, as well as shape the Moves you make.

Levers Worksheet: This worksheet will help you examine and identify opportunities within your Context that can be used as Levers to accelerate your systemic change goals.

Ecosystem Mapping Worksheet: This worksheet helps you map your Systemic Change Leadership Ecosystem by bringing together Moves you have already made, relevant elements of Leadership Context, and potential Levers. After completing this worksheet, you should have a sense of which Moves you might make next.

Change Leadership Planning Worksheet: This worksheet will help you develop your systemic change leadership plan by digging deeply into the Moves and sub-Moves and identifying exactly what they will look like in your Context, who will make these Moves, and when they will be made.

Assessing Leader Moves and Process Worksheet: Designed to be used after 3-6 months of implementation, this worksheet will help you reflect on your progress and your process and assess the efficacy of the Moves you have made.

5. More Ways to Engage with the CLT:

- Workshops: In-person or virtual for campus teams or organizations, customized length and content
- Webinars: Webinar series that takes teams through the entire CLT to develop a comprehensive Change Leadership Plan
- Consulting or Change Leader Coaching: Campus consultations or individualized change leader coaching sessions with one of our team members
- For more information, please visit <https://pullias.usc.edu/project/the-change-leadership-toolkit-for-advancing-systemic-change/> or changeleadershipgroup.org

6. Additional Resources: We have several additional resources available on our website to further support leaders engaged in systemic change. First, we published a series of Case Studies to help leaders understand the Toolkit in action. These Case Studies represent different institutional types and change projects and provide insight into how leaders in various roles and with different levels of agency made certain Leader Moves and pulled particular Levers to achieve their project outcomes. Visit <https://pullias.usc.edu/clt-case-studies/> to access the Case Studies. Second, we put together a comprehensive Resource Library where we link specific tools and a reading list that can help assist in the systemic change process. There are resources and tools that focus broadly on the systemic change process, as well as resources that align with specific Change Leader Moves. Visit <https://pullias.usc.edu/project-page/toolkit-resource-library/> to access our Resource Library.

For real-life examples of the CLT in action, please don't forget about our Change Leadership Case Studies!

Here are a few examples from a selection of the Case Studies we offer:				
	Forsyth Tech Community College	University of Portland	California State University, Monterey Bay	University of LaVerne
Institutional Type	Community college	Private, Catholic university	State public university	Liberal arts college, Hispanic-Serving Institution (HSI)
Leader Role and Agency	President	Department chair	Dean	Faculty
Goals of Change	Change student onboarding practices and policies to improve retention and transfer	Adopt evidence-based teaching practices and use peer observation to improve teaching in STEM	Eliminate remedial courses to better serve minoritized students	Create a new teaching evaluation policy for the institution
Moves Highlighted	<p>Create Vision, Expectations, and Pacing</p> <p>Sensemake and Learn</p> <p>Develop Strategy and Resources</p> <p>Lead People and Teams</p> <p>Foster DEI</p> <p>Communicate Effectively</p> <p>Engage in Advocacy and Navigate Politics</p>	<p>Create Vision, Expectations, and Pacing</p> <p>Sensemake and Learn</p> <p>Lead People and Teams</p> <p>Communicate Effectively</p> <p>Engage in Advocacy and Navigate Politics</p>	<p>Create Vision, Expectations, and Pacing</p> <p>Sensemake and Learn</p> <p>Develop Strategy and Resources</p> <p>Lead People and Teams</p> <p>Communicate Effectively</p> <p>Engage in Advocacy and Navigate Politics</p>	<p>Create Vision, Expectations, and Pacing</p> <p>Foster DEI</p> <p>Communicate Effectively</p> <p>Engage in Advocacy and Navigate Politics</p> <p>Prepare for Success Over the Long Term</p>

	Forsyth Tech Community College	University of Portland	California State University, Monterey Bay	University of LaVerne
Context	Institutional type Culture	Institutional type Culture	Human capital and capacity Externalities	Institutional type Culture
Levers	Campus (system, state) strategic plan(s), including mission, master plan, diversity plan, and other plans Affiliations with national associations and organizations	Campus (system) culture, norms and networks Funding streams and sources	Campus (system) culture, norms and networks Campus (system, state) strategic plan(s), including mission, master plan, diversity plan and other plans Rewards, incentives, constraints and perceptions	Governance and power structures

And see many more case study examples on our website at <https://pullias.usc.edu/project-page/the-change-leadership-for-advancing-system-change-case-studies/>

SECTION 1: Guiding Frameworks and Background for Change

Two main frameworks supported the development of the Change Leadership Toolkit. We first describe the **Keck/PKAL Model for Systemic Institutional Change** as a way to understand the complex process of change. We then introduce the equity and social justice framework lens applied in the development of the Toolkit found in the book **Higher Education Administration for Social Justice and Equity**.

The Keck/PKAL Model for Systemic Institutional Change

Systemic change is a long-term journey. There are several different models and theories of change that have tried to capture this complex process that occurs over time. One example is Kotter's eight-step process model (Kotter, 1996). Another is the model developed and published by Elrod and Kezar (2016) to advance change in undergraduate STEM education, shown in Figure 1. This model, which conceptualizes the change process as a river, is a helpful visual representation of the systemic change process over time.

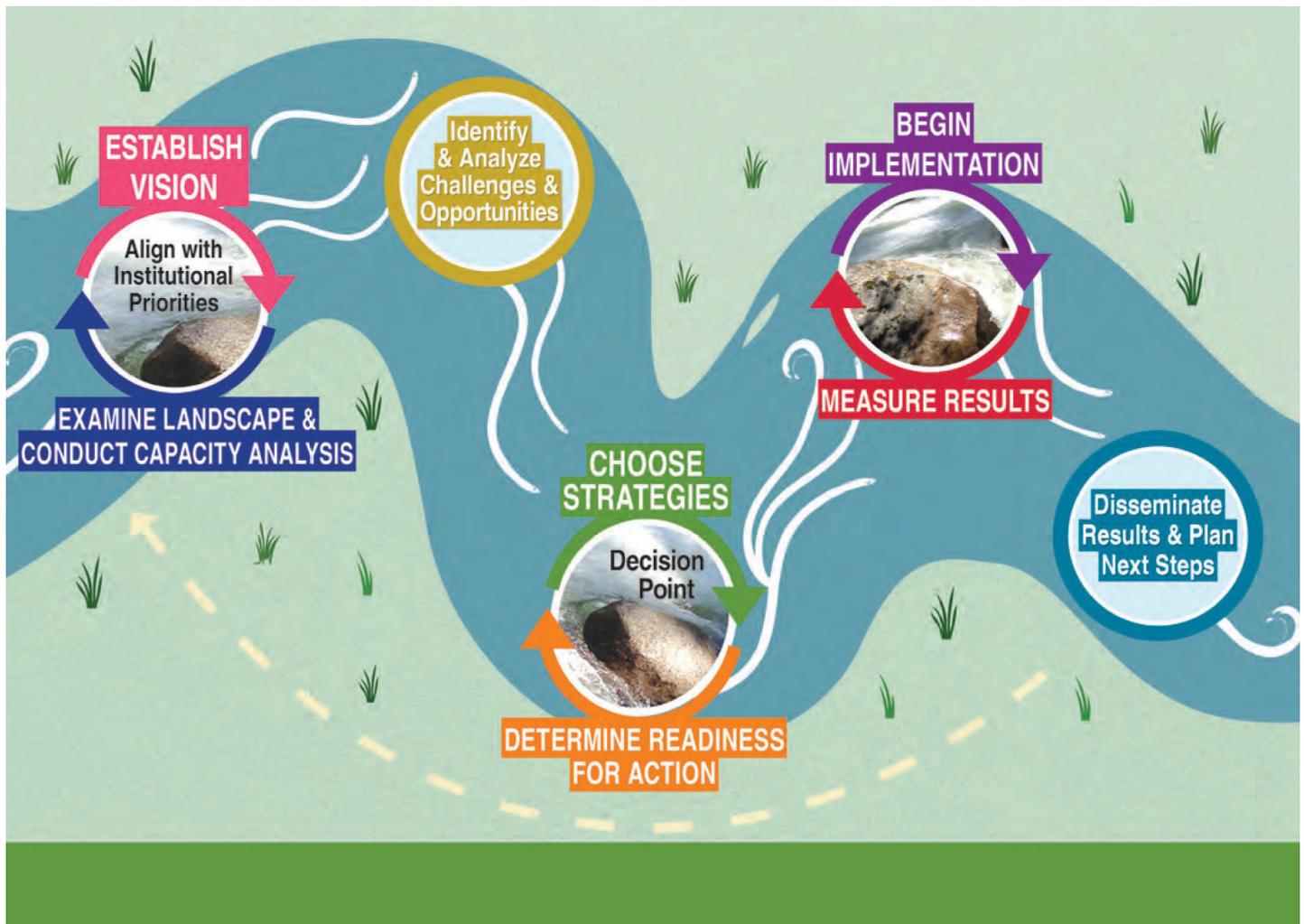


Figure 1
The Keck/PKAL Model for Systemic Institutional Change in STEM Education

The Keck/PKAL model uses a river metaphor for change because the flowing nature of a river can mirror the process of institutional change that is both dynamic and in constant flux. In this model, the flow corresponds to the change process, with obstacles or challenges in the course of change shown as rocks and eddies (circular arrows) that may slow the flow. Those traveling on the river may enter or exit at any point due to competing campus priorities, shifts in duties, leadership changes, fatigue, or other contextual changes. Sometimes the river is flowing smoothly and leaders are moving their change efforts forward, while other times they may hit rapids and be unable to move forward until issues are addressed. Similarly, there might be new travelers joining the team on the river who bring new energy, skillsets, and ideas to the systemic change process. As stated at the bottom of the river diagram, progress through the flow requires leadership, assessment of readiness and, ultimately, action. The Moves described in this Change Leadership Toolkit can be mapped onto this river process. Explore the [Keck/PKAL Model for Systemic Institutional Change in STEM Education](#) guidebook to learn more about the change journey.

Social Justice and Equity Mindset for Application of Toolkit

The Change Leadership Toolkit embeds equity and social justice in the systemic change process. We recognize institutions of higher education perpetuate inequities for minoritized communities such as first-generation college students, low-income, Black, Indigenous, People of Color (BIPOC), women, and those from the Lesbian, Gay, Bisexual, Transgender, Queer and more (LGBTQ+) community. As leaders explore their change project goals and outcomes, they must consider whether they are (intentionally or unintentionally) reinforcing inequities or moving toward equity. Kezar and Posselt (2020) speak to the need for infusing an equity and social justice framework into higher education leadership and administration. This Toolkit applies critical elements of the equity and social justice framework presented in their book, **Higher Education Administration for Social Justice and Equity**, to the change process. We took several specific steps to ensure that this framework was authentically embedded throughout the Toolkit.

First, we engaged numerous diverse leaders across institutions and identities in the creation and refinement of the Toolkit. They provided feedback and shared insights as to whether the Ecosystem Model, Change Leader Moves, and tools reflected the concerns of minoritized leaders and would help

address inequities. For example, in the Change Leader Moves categories, beyond calling out explicitly **Fostering Diversity, Equity, and Inclusion (DEI)** as a Leader Move itself, we embed DEI across various Moves. Similarly, in the **Lead People and Teams Move**, we describe the importance of including those with minoritized identities on change leadership teams.

Second, we developed reflection activities that foreground equity. For instance, in the “Getting Started” section, there are questions about how the proposed change will address inequities on campus, as well as questions that speak to team formation and the need for diverse voices that help cultivate equitable change. Change leaders can also explore the ethical considerations of the systemic change being tackled through critical reflection and learning from past change projects, with the goal of pinpointing where past efforts went awry or had inequitable outcomes (Kezar & Posselt, 2020). The Toolkit activities require reflexivity, sensemaking, and learning, which all support equity-mindedness in the systemic change process.

Finally, another Pullias Center resource for leaders interested in systemic changes that are specifically designed to dismantle inequitable systems and structures is the Shared Equity Leadership (SEL) model. SEL engages teams or groups of

leaders collectively in leadership for DEI and requires both individual and organizational transformation. Leaders engage in a personal journey towards critical consciousness, in which they reflect on their own identities and experiences as well as the structural and systemic nature of inequity. Collectively, leaders operate with a new set of values and practices that help them infuse equity work across campus rather than

siloeing it in a single office or under a single leader. Leaders engaged in DEI-specific systemic change projects should look at the SEL resources available on the [Pullias Center website](#) for additional support. Our team is also working to integrate the CLT with the SEL model to create an equity-centered guide to systemic change, so please stay tuned for additional resources to come!

SECTION 2: Getting Started with Systemic Change: Clarifying Your WHAT, WHY, and WHO of Change

Before you dive into using the resources of the Change Leadership Toolkit, it is important to clarify what change you are trying to make, why you want to make this change, and who needs to be involved in order to make it happen. Your “what” of change involves the goals, intended outcomes, level, and focus of change. What are you trying to accomplish with this project? Is it, in fact, a systemic change—one that cuts across multiple departments and divisions and changes policies, procedures, norms, cultures, or structures? Does it represent a real alteration of the status quo? Or is it a more routine and well-defined change, such as creating a new course or hiring a new leader? Sometimes these differences are called first-order or second-order change (Kezar, 2018). First-order change focuses on “minor improvements or adjustments,” while second-order change addresses “values, assumptions, structures, processes, and culture” (Kezar, 2018, p. 71). Typically, systemic change is second-order change. If your project is not a systemic change, this guidebook is probably not the right resource for you. You can likely accomplish your goals in a more simplified or straightforward way, though you may still find some helpful tips in this guidebook. This section will help you determine whether your intended change is systemic in nature. Figure 2 also provides examples of what systemic change **is** and **is not**.

SYSTEMIC CHANGE

One that cuts across multiple departments and divisions and changes policies, procedures, norms, cultures, or structures

CLARIFYING SYSTEMIC CHANGE

	YES
Eliminating remedial course requirements and resulting degree and curricular decisions	
Integrating DEI outcomes into faculty promotion and tenure criteria	
Promoting use of evidence-based teaching practices campuswide	
Institutionalizing effective practices that reduce the number of high failure rate courses	
Streamlining bureaucratic practices that are barriers to student success	
Reorganizing academic schools and colleges	
Merging or closing campuses	
	NO
Revising a course to include experiential learning	
Forming a new teaching and learning center	
Drafting a new policy on scholarships	
Preparing a budget for a new department	

Once you clarify your “what” of change and confirm that it is, in fact, systemic, you should also understand the “why” behind what you are doing. Your “why” of change gets at the motivation behind the project. Understanding your “why” can help you align your project’s goals with broader institutional goals or mission and promote buy-in.

Finally, after you clarify your “what” and your “why,” it is time to think about your “who.” Which leaders on campus are best positioned to help you accomplish your goals, whose motivations might align with or complement your own? Systemic change requires a team or shared approach to leadership, and identifying team members who can work together to accomplish these goals is a crucial part of the planning process.

WHAT OF CHANGE: Identifying Goals and Outcomes, Level and Focus

As you consider leadership team formation, it is important to keep in mind both your desired goals and outcomes of change as well as who has the ability and resources to help achieve these results. The outcomes of your desired change can help leadership team formation as you identify what Change Leader Moves particular leaders might make given their role(s) and agency. Additionally, revisiting your goals and outcomes of change will help you think about potential tensions and obstacles that might arise. Kezar (2018) highlights that in some change processes, resistance will emerge based on stakeholder interests and desired outcomes of systemic change.

Figure 2
What Systemic Change Is and Is Not

GOALS AND OUTCOMES OF CHANGE

Because “every change process is value-and interest-laden,” change agents should gauge who benefits from desired goals and outcomes of a project and whose interests are served in such achievement (Kezar, 2018, p.23). Depending on the scope, level, and focus of change, different types of initiatives may garner buy-in or engagement more or less easily. Examining the goals of change in relation to who might be impacted is an important consideration to make as part of the change process. Use the questions below to briefly reflect on your goals and intended outcomes of change.

REFLECTION ON GOALS AND OUTCOMES

WHAT ARE THE GOALS FOR THE CHANGE PROJECT? (including any subgoals)

WHAT ARE THE DESIRED OUTCOMES OF THE CHANGE PROJECT? (should be measurable, but not exclusively)

HOW IS YOUR CHANGE SYSTEMIC IN NATURE? (see definition, page 9)

WHAT ARE THE EQUITY IMPACTS OF YOUR CHANGE EFFORT? (consider who might be impacted)

LEVEL AND FOCUS OF CHANGE

You have identified the goals and outcomes of change. Now, consider the scope of this change. Change happens at multiple levels — individual, group, and organizational. Individual-level change might involve changes to faculty teaching practices or training advisors to use new proactive advising approaches, for example. Group-level change could involve changes to faculty meeting norms, search committee practices, or an academic program. Organizational-level change could include changes to the teaching evaluation process, admissions standards, or advising structures. Most systemic change projects require change across multiple levels. Considering which parts of your change goals are situated at which levels can help you plan accordingly. Lastly, you should consider your focus of change, meaning the “phenomenon affected” (Kezar, 2018, p. 74). There are three types of foci: structures, processes, or attitudes/values. Structures refers to a focus on changing how aspects of the campus are organized, including elements such as leadership organizational charts or policies. Process-focused changes are those that deal with how things happen on campus, such as how students register for classes, the interview process for faculty, or other operations-related changes. Attitudes/values-focused changes relate to how people feel about their work in relation to structures and processes — in other words, the organizational culture (Kezar, 2018). Below are a few questions to help you reflect more deeply on the level and focus of your change.

REFLECTION ON LEVEL AND FOCUS

AT WHAT LEVEL IS YOUR SYSTEMIC CHANGE PROJECT NESTED? (e.g. individual, group, organizational, or multiple levels)

IF THERE ARE MULTIPLE LEVELS OF CHANGE, PLEASE REFLECT ON DIFFERENT GOALS OR OUTCOMES YOU MAY HAVE FOR THESE DIFFERENT LEVELS.

WHAT IS THE FOCUS OF YOUR CHANGE GOALS AND OUTCOMES? (e.g., structure, process, or attitudes/values)

WHY OF CHANGE: Clarifying Motivation and Evidence

Now that you have determined the goals, outcomes, level, and focus of your change, you should make sure you are clear on why this change matters. Your “why” of change is related to the motivation behind undertaking this particular change project at this particular point in time. Is it a mandated change, or one that stems from your own personal passions or convictions? Is it something you have observed at peer institutions or read about in higher education trade publications or research journals? What evidence exists to support the potential efficacy of this change? Clarifying the motivation behind your change is an important step that can help you recruit other leaders to work with you to make the change happen. Being able to clearly share the need for the change with others and provide evidence in support of this change will help build trust and dampen resistance (Kezar, 2018). The questions below can help you dig more deeply into the “why” behind your change.

REFLECTIONS ON MOTIVATION AND EVIDENCE

WHY IS THIS CHANGE IMPORTANT AT YOUR INSTITUTION?

WHY IS NOW THE RIGHT TIME TO PURSUE THIS CHANGE PROJECT?

WHAT EVIDENCE EXISTS IN SUPPORT OF THIS CHANGE? (e.g. journal articles, examples from other campuses, data)

WHO OF CHANGE: Leader Role(s), Agency, and Teams

Creating systemic change requires leadership not just from one leader, but from many leaders working together in a coordinated system that takes into consideration their various roles and agency. Change agents must be attuned to a “broad and expansive view of leadership,” one that doesn’t only consider “individuals in positions of power,” but rather considers a collective or network of members across the institution (Kezar, 2018, p. 135). Below we provide a brief overview of how role(s) and agency can impact the change process, as well as considerations for building your leadership team.

LEADER ROLE(S)

In this Toolkit we conceive of roles in two ways. First, we underscore that there are functional roles with certain duties, tasks, and actions that can shape change leadership. Functional areas in higher education range from student affairs and academic affairs to business affairs, auxiliary services, facilities, alumni relations, and development/fundraising, among others. Below we highlight four functional roles that are commonly involved in systemic change efforts.

Student Affairs/Services Roles: Roles within this function are often associated with direct service and support for students. These roles include a variety of functions that pertain to the holistic development of the student. These functions include residence life, student life, cultural centers, student government, and many more that are primarily student-facing.

Academic Affairs/Services Roles: These roles often have a direct tie to the learning function of the institution, such as leaders working in “teaching and learning centers, online learning, assessment, deans’ offices for a school or college, provost’s offices, and sometimes academic support programs” (Holcombe et al., 2022, p.8).

Administration, Finance and Institutional Research Roles: These roles have ties to budget, facilities, data and information that is frequently required to focus on the funding, physical infrastructure and evidence needed to support the change.

Faculty Roles: These roles are associated with the teaching and learning that happens within the classroom. Faculty have a key responsibility in curriculum development — what gets taught and how. Further, faculty have traditionally played an important leadership role on campus through shared governance systems. There are a variety of types of faculty roles that are engaged differently on campuses (i.e., adjunct faculty, tenure-track faculty). A great example of a project that works to examine differences among faculty being hired off the tenure track is [The Delphi Project on the Changing Faculty and Student Success](#).

Second, role relates to not just what you do — your function — but your positioning within the “organizational hierarchy — senior, mid-level, and ground-level” (Bess & Dee, 2008; Holcombe et al., 2022). In essence, role is then both the function assumed by a leader in a particular area and their level within the organizational structure. In terms of hierarchical role, there are typically three levels to consider:

Senior-level leaders are usually either part of the presidential cabinet or presidents themselves. Senior-level leaders are able to work with a variety of campus leaders because of where they are situated within the organization. Similarly, they engage both with internal and external constituents as part of their role.

Mid-level leaders include directors, department chairs and deans, institutional researchers, librarians, and deans of students. Often within hierarchical leadership structures, these leaders are positioned between two leadership forces with different needs and wants (senior and ground-level leaders). Mid-level leaders in change initiatives are positioned to be translators across different constituent groups because of where they are situated, serving as communicators who can bridge different messages across levels of the organization.

Grassroots or ground-level leaders are those engaged in the core work of the institution, such as faculty, students, and entry-level staff. Their perspective will be informed by their work with students, whether inside or outside the classroom, or by their experience as students. While these leaders may not have formal positions of power and authority, they could have informal leadership roles that carry significant influence.

Leaders across all the roles mentioned can be important change agents. Additionally, the functions and position of a role are not mutually exclusive from one another, and some roles might be seen as boundary-spanning. As you navigate your systemic change project, you may need to bring in leaders in certain roles at specific points to achieve your desired outcomes.

LEADER AGENCY

Agency relates to who you are and what you bring (e.g., identity, passion, experiences, social status) to your role that empowers you to act (e.g., capacity) (Kezar, 2018). These different facets that shape one's agency are important when considering systemic change efforts. For example, a leader who is passionate about sustainability might engage thoroughly in a system-wide climate change initiative for their students. Their passion for sustainability and environmental concerns can be a motivator for entering an existing change project. Another example might be a campus working to

develop a supportive culture for transfer students. A faculty leader who was a transfer student at one point might choose to engage with these efforts and join the campus-wide committee because they can pull from their own experiences to help the change process. Similarly, a first-generation administrator who is the director of retention-based programs might not only be able to ignite change because of their functional role and administrative skills, but also because of their personal identity and experiences. This leader might utilize their agency to advance support for first-generation students by establishing a new student orientation that is culturally responsive to these nuanced needs.

Leaders' agency is influenced by the structural and cultural aspects of the ecosystem in which they find themselves working. A senior-level leader for example, might choose to closely align strategies of change with their formal positional power. Say a president of a university is charged with helping to establish the values, vision, and mission of change. This charge will inform their work on using planning mechanisms, such as resource allocations or changes in motivational techniques such as incentives and rewards (Kezar, 2018). Senior-level leaders, like a president, can have wide-ranging agency that impacts the campus-wide community across scope, level, and foci of any change.

Aspects of leader roles and agency can overlap as they relate to one's function, social status, and power within an institution's organizational chart. For example, senior-level leaders "often have the ability to mandate change, alter rewards structures, use devices such as strategic plans, refine mission and vision statements, and have other mechanisms to support changes" (Kezar, 2018, p.136). This ability stems from their roles, embedded within formal structures that provide specific positional power and influence (Kezar, 2018). Mid-level leaders, however, have the opportunity to act on their agency and engage "smaller spheres of influence,"

helping teams navigate through challenges, identify and share opportunities, while affirming successes of their team (Holcombe et al., 2021, p. 203). Grassroots-level leaders

often have the agency to generate excitement about a new initiative and help promote implementation and success by identifying sources of resistance, advocating, and cheerleading.

REFLECTIONS ON ROLE AND AGENCY

WHAT IS YOUR FUNCTIONAL ROLE?

WHAT IS YOUR POSITIONAL ROLE?

WHAT ASPECTS OF YOUR IDENTITY, PASSION, AND/OR EXPERIENCES EMPOWER YOU TO ACT AS A LEADER? (Thinking about who you are personally, professionally, and in the context of the project in which you are involved may help you identify your leader agency)

FORMING TEAMS

Extensive work on change and leadership supports that a team approach is often much more successful at achieving change than having leadership efforts rest with a single leader or few individuals (Bensimon & Neumann, 1993; Kezar & Lester, 2011). However, forming a team must be done with intentionality. When we say team(s), we draw from Bensimon and Neumann (1993), where a team is not just an assemblage of people from across the institution; rather, a team consists of individuals that come together within an organizational context to build capacity toward “innovation, problem solving, and productivity” (p. iv). Team members must be “carefully selected, oriented, and socialized” to avoid dysfunctionality and yield desired change outcomes (Kezar, 2018, p. 101). Thus, team formation must consider teams that are diverse not just by role, skillset, or knowledge, but also racial, gender, socio-economic status, experience, and backgrounds.

There is an array of benefits to utilizing a team or shared leadership approach that ultimately “fosters improved performance of both teams and organizations (Elrod et al., 2021, p. 50). Leadership teams need to know how to

function efficiently and productively together and not just as a collection of individual leaders. Within a shared leadership framework, leadership as a process is “heavily influenced by context (both within and outside an organization), shaped by participants’ interpretations of their environment, and takes place over time” (Holcombe et al., 2021, p. 28). This perspective aligns well with the framework we describe in the next section of this Toolkit, where contextual leadership factors shape the actions leaders can take.

Now it is time to think about your “who” of change — that is, who should be on your change leadership team. Teams can vary in size from 5-8 on a smaller campus or within a department to 25-30 people for a more comprehensive institution-wide change effort. In the Forming Teams Chart below, take some time to think about who is (or should be) on your team. What is their role? What agency do they bring to the project? What specific knowledge and skills will help them contribute to the project’s success?

FORMING TEAMS			
WHO IS ON THE TEAM? Name	LEADER ROLE What function and organizational positioning do they represent?	LEADER AGENCY What do they feel empowered to contribute to in the change initiative? <i>(consider identity, passion, experiences, social status)</i>	KNOWLEDGE & SKILLS OF CHANGE PROJECT How do they have knowledge or skills about the change initiative?
Example: Maria Martinez	Department Chair	Woman, scientist, Latina, concerned about first-gen student challenges, alum of the university	Created programs, taught courses, mentored students

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For further details about skillsets or functions that are critical for teams, read chapters 2-4 of Bensimon and Neumann (1993) **Redesigning Collegiate Leadership: Teams and Teamwork in Higher Education**, and Kezar et al., (2006) **Rethinking the ‘L’ Word in Higher Education: The Revolution of Research on Leadership**, the section on Team and Relational Leadership (p.62). Another resource — **Shared Leadership in Higher Education**, Holcombe et al. (2021) — explores team formation and other team processes that are also important to consider. While outside the scope of this guide, we recommend reading chapter 4, **Creating an Environment of Support for Shared Leadership: Building Organizational, Team, and Individual Capacity** in the book, **Shared Leadership in Higher Education**. Holcombe et al. (2021) outline considerations of forming teams and building team capacity through a clear and shared purpose, composed of diverse leaders with varying expertise,

whose roles are clearly defined, who plan actions together in a collaborative process, and are provided opportunities for ongoing team coaching and development. Links to these and other shared leadership resources for team(s) to use to help drive success over time are provided in the [Resource Library](#).

While you likely completed this section on your own, we recommend that teams work together to complete the remaining components of this Toolkit (specifically the Worksheets in Section 4) in order to maximize your desired systemic change outcomes. The next section (Section 3) provides an overview of the Ecosystem Model of Systemic Change Leadership and contains crucial background information to set you and your team up for success when completing the planning exercises in Section 4.

SECTION 3: Overview of the Ecosystem Model of Systemic Change Leadership

The Ecosystem Model of Systemic Change Leadership is a framework for understanding systemic change processes. This model emerged through an iterative collaborative process with leaders in various roles and at different types of institutions across the nation and shows that leaders do not operate in a vacuum. Rather, change is made within a broader context with varying opportunities and challenges that influence decisions, actions, and outcomes (Kezar, 2003). It is a continuous process shaped by unique institutional and external factors that can (and should) influence leaders’ approach to change.

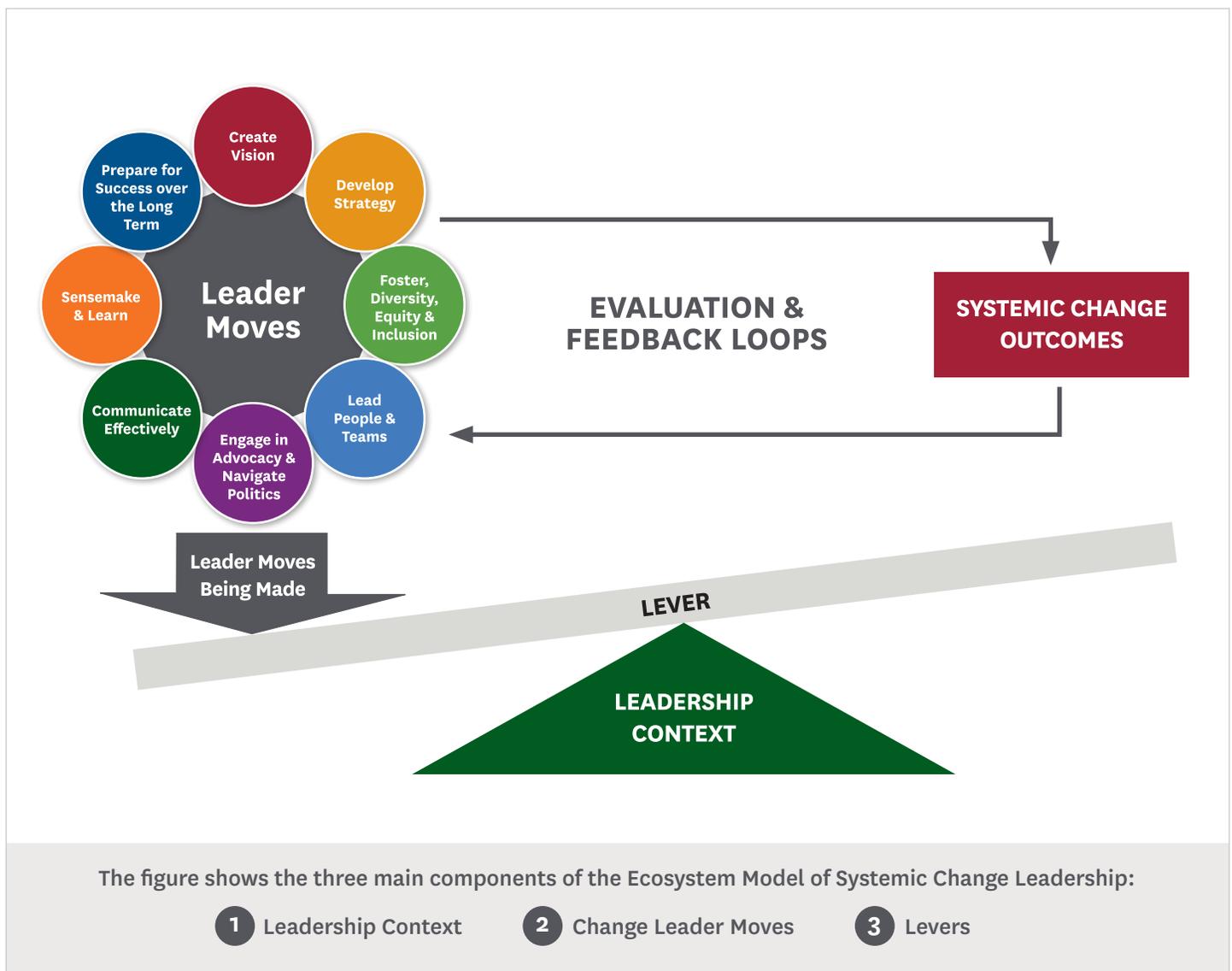


Figure 3
Ecosystem Model of Systemic Change Leadership

The Ecosystem Model focuses on the actions leaders take to drive change, or the Change Leader Moves. Depicted in the multi-colored circles at the top left of Figure 3, Moves can be made one by one or in clusters, and different leaders working collectively can make different Moves at the same time. These Moves are situated within a broader Leadership Context, represented by the green triangle at the bottom of Figure 3. Leadership Context includes many factors, from institutional type, leadership structure and governance, to institutional culture, politics, or external influences. Context shapes the Ecosystem in two ways. First, it shapes how Moves are executed. For example, a leader at a small, close-knit institution will likely carry out Communication Moves differently than a leader at a large, decentralized campus. Second, Leadership Context provides the larger environment of opportunities and barriers that also shape a systemic change process. For example, a campus with a culture that supports experimentation will likely be more open to a new systemic change project (opportunity), while a campus with a culture strongly in favor of the status quo may have more difficulty initiating systemic change (barrier).

Leaders should also be aware of potential Levers, which can accelerate the Moves or amplify the change process. Levers can be identified by analyzing Leadership Context and looking for potential opportunities that can be used as a springboard for change. For example, in the previous example about a campus with a culture supportive of experimentation, leaders might use that culture as a Lever by creating a new competition or innovation award related to their desired systemic change goals.

Systemic change takes time, and the model shows this cycle occurring iteratively, over time (see arrows), with its interacting components being carried out by multiple different types of leaders working in concert. The arrows also represent the evaluation and feedback loops happening as the campus moves toward achievement of systemic change outcomes,

resulting in adaptation, adjustments, and redirection of change leader actions as progress is made. This model focuses on the process of change to remind readers that leadership is a complex endeavor that goes beyond individual actions or traits (Holcombe et al., 2021). The following sections describe each piece of the model in greater depth: Change Leader Moves, Leadership Context, and Levers.

Change Leader Moves

We have defined eight categories of “Moves” or actions that Change Leaders make in creating successful, systemic, and sustainable change. They are shown in Figure 4 and briefly described below.



Figure 4:
Change Leader Moves

CREATE VISION, EXPECTATIONS AND PACING

These Moves result in the development and articulation of a shared vision drawing widely from campus stakeholders as well as articulation of goals, outcomes, and timing. This vision is most successful when aligned with the institution's mission and must be cognizant of prior relevant systemic change efforts (successful or otherwise).

→ **Why these Moves are important:** The team must have a shared vision of what they are trying to accomplish in order for change to be successful. Without a clear, shared vision, everyone will have their own idea about what is important, and the team may become fragmented or unable to agree on what needs to be done. It will also be difficult for the team to communicate what they are trying to achieve to others who need to get on board for support or resources.

DEVELOP STRATEGY AND RESOURCES

These Moves result in the development of an appropriate strategy or plan that includes the right set of actions to reach the desired vision, as well as organization of the revenue (with an eye/lens on who is impacted), infrastructure, and human resources needed to be successful.

→ **Why these Moves are important:** Without a plan, change will not happen. Strategy is important so the team and others involved have a roadmap for not only knowing where they are going, but how they will get there. These plans must be created in alignment with the vision as well as with other campus priorities for the greatest success.

FOSTER DIVERSITY, EQUITY, AND INCLUSION

These Moves ensure attention to diversity, equity, and inclusion (DEI) throughout the initiative. They involve using a DEI lens to situate the work, develop strategies, address cultural issues, and ensure the inclusion of diverse voices and perspectives across social identities (e.g., women, BIPOC, 1stGen, etc.), organizational role (e.g., student, faculty, staff) and other constituents' interests (e.g. community members).

→ **Why these Moves are important:** Truly systemic change requires a rethinking of the status quo, which can only happen with contributions from people with different perspectives, experiences, and backgrounds to ensure that whatever occurs in the change project meets the needs of the diverse audiences being served. Also, when only a small group of like-minded individuals are leading an effort, they may have tunnel vision and not be able to see areas for needed improvement. Foregrounding diversity and inclusion will help avoid inequities and promote equitable outcomes.

LEAD PEOPLE AND TEAMS

These Moves result in the development of high-functioning individuals and teams that drive success in any systemic change initiative. Leadership teams should be diverse not just in terms of disciplinary background or expertise but also social identities and life experience. They should be organized with expertise relevant to the change goals, inclusive of appropriate stakeholders, and attentive to the development and empowerment of leaders.

→ **Why these Moves are important:** Change is not led by a single individual but requires that many people are involved in the effort. Systemic change in particular touches many areas of the institution and thus requires a variety of leaders engaged in the process. Taking a team or shared leadership approach also ensures that leaders with diverse perspectives and experiences are included in the change process.

ENGAGE IN ADVOCACY AND NAVIGATE POLITICS

These Moves relate to understanding the dynamics of power and influence (informal and formal) and how to navigate them to achieve change goals, from recruiting key influencers and changing the minds of skeptics, to making the case to those in decision-making positions. These Moves also include effectively advocating for change to various audiences in order to gain support and foster success.

→ **Why these Moves are important:** Systemic change efforts involve an examination of practices and policies, as well as budgets, budget processes or other areas of the institution associated with power and influence. In addition, some changes require navigating challenging political territory, such as powerful committees or leadership structures. The identification of allies and the ability to win over skeptics may also be pivotal to success.

COMMUNICATE EFFECTIVELY

These Moves result in strong communication about the change initiative, both internally and externally. Effective communication includes crafting messages that inclusively engage stakeholders in conversations, telling meaningful stories, and soliciting and listening to feedback to amplify the voices of change makers.

→ **Why these Moves are important:** Change teams must effectively communicate about their work in order to gain needed support and resources, engage in strategy discussions with stakeholders, advocate for their project, and expand their base of support in order to reach all the areas of the institution that may be involved in the change process. It is also important to solicit and respond to feedback to ensure that all voices are heard.

SENSEMAKE AND LEARN

These Moves involve using data and information to understand the problem, gauge stakeholder perceptions, raise consciousness, and bridge gaps in current and needed knowledge and understanding in order to ensure strong organizational learning and development.

→ **Why these Moves are important:** Using data to inform change strategies will ensure that problems are well-understood and challenges are well-defined so that they can be addressed effectively. Leaders should consider numerical as well as qualitative data to provide the widest view possible of the situation. Additionally, teams should monitor data as the change effort is getting started, but also over the course of the project to help the team make adjustments along the way.

PREPARE FOR SUCCESS OVER THE LONG TERM

These Moves result in long-term project success and include ensuring ways to measure success and maintain momentum, identifying appropriate infrastructure required to scale and sustain the change (e.g., budget, policy, process, physical plant), building motivation and emotional support, understanding the human toll of change, and identifying next steps beyond the current project.

→ **Why these Moves are important:** Organizational change takes time, especially systemic change. It is easy to create a small pilot program, but long-term and scalable changes require shifts in infrastructure, policies, norms, and culture. In order for leadership teams to avoid surprises or setbacks, teams need to think through possible challenges up front so they can prepare for them right from the start.

These eight Change Leader Move categories each contain 'submoves' that provide a more in-depth understanding of what the Moves look like in action as leaders engage in systemic change efforts. Table 1 contains a list of potential sub-Moves within each category. Please note that this list is not exhaustive. These sub-Moves are merely the ones that showed up most in our research with leaders, but there are almost certainly more ways to make these Moves than the ones we have listed here.

Table 1

Moves and Potential Sub-Moves

Change Leader Move	Potential Sub-Moves or Examples of the Move
<p>CREATE VISION, EXPECTATIONS AND PACING</p> <p>These Moves result in the development and articulation of a shared vision, drawing widely from campus stakeholders as well as articulation of goals, outcomes, and timing. This vision is most successful when aligned with the institution’s mission and must be cognizant of prior relevant systemic change efforts (successful or otherwise).</p>	<p>Facilitate development of a shared vision with an understanding and ability to navigate the relevant internal and external landscapes, including institutional history of reform and where your project fits in to broader goals; identify appropriate locus(i) of change activity(ies)</p>
	<p>Articulate vision and reframe as necessary to maintain motivation; connect the dots especially to the bigger picture and beyond the university to societal/political/DEI or other important contexts, challenges or issues</p>
	<p>Set pace and expectations of change with clear expectations and hold people accountable</p>
	<p>Create a sense of importance and urgency</p>
	<p>Negotiate the tension of fidelity to institutional mission with the need for innovation and responsiveness to the change’s urgency and agenda</p>

Change Leader Move	Potential Sub-Moves or Examples of the Move
<p>DEVELOP STRATEGY AND RESOURCES</p> <p>These Moves result in the development of an appropriate set of plans that include actions that are equitable to reach the desired vision, as well as organization of revenue (with an eye/lens on who is impacted), infrastructure, and people resources needed to be successful.</p>	<p>Develop strategic plans that align with goals and vision</p>
	<p>Obtain new or reallocate existing resources, including fundraising, grant writing</p>
	<p>Identify and use relevant data to inform strategy and decision-making</p>
	<p>Ensure coordination among various aspects (resources, data analysis, opportunities) and teams working on the project</p>
	<p>Secure and promote early wins; use wins to maintain pace of change (e.g., obtaining a grant, approval by Provost to proceed, addition of a new community partner)</p>
	<p>Leverage existing opportunities, projects, initiatives, strategic or other campus plans</p>
	<p>Anticipate and identify challenges, barriers or bottlenecks (e.g., audit current policies and practices to determine alignment with changes or ways they may be barriers)</p>
	<p>Develop a plan to overcome challenges, barriers or bottlenecks; evaluate and monitor progress</p>
	<p>Respond to and negotiate challenges, barriers and bottlenecks to effectively overcome them (e.g., having difficult dialogues that address hot topics)</p>

Change Leader Move	Potential Sub-Moves or Examples of the Move
<p>FOSTER DIVERSITY, EQUITY AND INCLUSION</p> <p>These Moves ensure attention to diversity, equity and inclusion (DEI) throughout the initiative. They involve using a DEI lens to situate the work, develop strategies, address cultural issues and ensure the inclusion of diverse voices and perspectives across social identities (e.g., women, BIPOC, 1stGen, etc.), positional identities (e.g. student, faculty, staff) and other constituents’ interests (e.g. community members).</p>	<p>Apply diversity, equity and inclusion (DEI) lens to the work; demonstrate the value of diversity in articulating how change will contribute to making progress</p>
	<p>Use knowledge of national landscape with respect to DEI; situate local diversity efforts in the broader/national DEI agenda</p>
	<p>Use DEI-appropriate disaggregated data to inform goals and measure progress</p>
	<p>Understand how implicit cultural norms and biases intersect with, inform, or may impede change; develop approaches to address these issues as they arise</p>
	<p>Develop and value team leaders with diverse experiences and perspectives; identify opportunities to expand inclusion and representation</p>
	<p>Recognize possible taxation on groups who are overburdened, sometimes based on their social identities (women, BIPOC, 1stGen, etc.), to do change work and create buffers to mitigate burnout and push-out for these diverse leaders</p>

Change Leader Move	Potential Sub-Moves or Examples of the Move
<p>LEAD PEOPLE AND TEAMS</p> <p>These Moves result in the development of high-functioning individuals and teams that drive success in any systemic change initiative. Leadership teams should be diverse, not just in terms of disciplinary background or expertise, but also social identities and life experience. They should be organized with expertise and perspectives focused on the change goals, inclusive of appropriate stakeholders, and attentive to the development and empowerment of leaders.</p>	<p>Identify, recruit & support key leaders, advocates and champions</p>
	<p>Identify and engage an appropriate and diverse set of stakeholders, including staff, students, faculty, administrators, leaders and community members</p>
	<p>Generate excitement and connect to vision to get people on board by engaging various stakeholders</p>
	<p>Establish diverse teams; ensure new voices/ other voices/credible voices are valued; identify opportunities to expand inclusion and representation</p>
	<p>Create an environment that is safe for risk-taking and honest expression of perceptions, feelings, ideas; evaluate level of risk and appropriate risk-taking for different aspects of a change agenda; prepare to address possible negative consequences of having difficult dialogues</p>
	<p>Create inclusive ways for people to engage and participate</p>
	<p>Leverage incentives and rewards to motivate engagement</p>
	<p>Build relationships that foster collaboration and trust</p>
	<p>Develop and empower effective team leaders</p>

Change Leader Move	Potential Sub-Moves or Examples of the Move
<p>ENGAGE IN ADVOCACY AND NAVIGATE POLITICS</p> <p>These Moves relate to understanding the dynamics of power and influence (informal and formal) and how to navigate them to achieve change goals, from recruiting key influencers to changing the minds of skeptics to making the case to those in decision-making positions. These Moves also include effectively advocating for the change to various audiences in order to gain support and foster success.</p>	<p>Use political acumen and strategy to navigate the power structures (e.g., knowing when to show up or not, what to say when you do show up, remaining cognizant of how leader words and actions travel and have meaning to a broader audience)</p>
	<p>Know and mobilize people of influence, allies, experts, and skeptics</p>
	<p>Understand and develop strategies for addressing political issues, difficult dialogues, negative perceptions, and barriers as well as emerging opportunities</p>
	<p>Understand how to effectively work across roles, disciplines, hierarchies, power structures, boundaries, boundary conditions and institutional culture(s)</p>
	<p>Gain buy-in from diverse key campus stakeholders, influencers and allies</p>
	<p>Leverage external messages, challenges, opportunities or imperatives to maintain momentum for the change</p>
	<p>Develop a compelling and coherent message about the vision, goals and value of the initiative</p>
	<p>Foster transparent & inclusive conversations about vision, purpose, data, goals, outcomes and progress, as well as challenges</p>
	<p>Clearly articulate motivating factors, inform, persuade, educate and activate</p>

Change Leader Move	Potential Sub-Moves or Examples of the Move
<p>COMMUNICATE EFFECTIVELY</p> <p>These Moves result in strong communication about the change initiative, both internally and externally. Effective communication includes crafting messages that inclusively engage stakeholders in conversations, telling meaningful stories, and soliciting and listening to feedback to amplify the voices of change makers as well as your successes.</p>	<p>Tell stories; use symbols, metaphors and values to communicate about change to reach different relevant audiences</p>
	<p>Listen carefully; solicit feedback, reflect on it, and respond to it</p>
	<p>Amplify the voices of change makers, ensuring diverse people and perspectives are included</p>
	<p>Represent and advocate for diverse constituencies involved in the change effort when communicating about change project goals, outcomes and progress</p>
	<p>Ensure that internal and external dissemination opportunities are utilized to communicate about project</p>
	<p>Foster necessary and sometimes difficult dialogues with diverse cultural perspectives; address unconscious biases and other possible negative perceptions, feelings, or consequences that may arise during the change initiative</p>

Change Leader Move	Potential Sub-Moves or Examples of the Move
<p>SENSEMAKE AND LEARN</p> <p>These Moves involve using data and information to understand perceptions, raise consciousness, and to bridge gaps in current and needed knowledge and understanding in order to ensure strong organizational learning and development.</p>	<p>Understand and plan for how stakeholders may perceive proposed change, both positively and negatively</p>
	<p>Develop a plan for ways to bridge the gap between current and needed knowledge and understanding</p>
	<p>Develop data capacity and knowledge management systems</p>
	<p>Develop a plan to ensure appropriate data distribution and analysis to different groups that need to engage in learning</p>
	<p>Provide training to support data use and interpretation of data and use data to inform decisions</p>
	<p>Give public presentations on the project to foster continuous dialogue, both internally and externally</p>
	<p>Create documents, publications and concept papers that capture the vision</p>
	<p>Use data to monitor progress and adjust when needed; be mindful of possible negative or unintentional consequences</p>

Change Leader Move	Potential Sub-Moves or Examples of the Move
<p>PREPARE FOR SUCCESS OVER THE LONG TERM</p> <p>These Moves result in long-term project success and include ensuring ways to measure success and maintain momentum, identifying appropriate infrastructure required to scale and sustain the change (e.g., budget, policy, process, physical plant), building motivation and emotional support, understanding the human toll of change, and identifying next steps beyond the current project.</p>	Continuously evaluate and address emerging issues of scale and sustainability over the long haul
	Measure and celebrate success; connect project success with other institutional successes
	Reassure when setbacks occur; encourage; motivate to keep momentum going
	Balance responsiveness and urgency in landscape and context; address inertia
	Build on successes to accelerate momentum
	Apply learning from successes and failures to project processes and outcomes
	Build and sustain leadership capacity on campus; create pathways for diverse emerging leaders, monitor and prepare for leader transitions and succession
	Identify next steps, vision beyond current project
	Identify infrastructure required to scale and sustain change (e.g., budget, policy, process, structure)

Leadership Context

In any systemic change project, there are a variety of contexts within which leaders are operating that influence what they might do and how they might do it. These contextual factors could result in change being made — or not. On average, 70% of change initiatives fail in the implementation process (Kezar, 2018). Therefore, Leadership Context is an important part of the change process for leaders to consider (Kezar, 2018). Both internal and external Leadership Contexts can influence the systemic change process (Elrod & Kezar, 2016; Kezar, 2018). Internal contextual factors are those aspects of Leadership Contexts that can be bound by the internal workings of the institution, whereas external contextual factors go beyond institutional boundaries. Leadership Context shapes which Moves are made and how they are made and also presents opportunities and barriers to navigate as the change process unfolds.

This section describes eight categories of Leadership Context that leaders should consider when working on systemic change projects. These categories are derived from existing organizational change research in higher education, as well as from practitioner feedback in the development of this Toolkit (Kezar, 2018). In the Ecosystem Model presented in Figure 5, Leadership Context is depicted as a green triangle — the foundation upon which the Leader Moves are made. Figure 4 shows the main aspects of context that leaders should consider: institutional type; leadership and governance; culture; politics; human capital and capacity; physical, financial, and technical resources; and externalities. While not exhaustive, this list provides key Leadership Context factors that influence the systemic change process. Examples of each category of Context are provided on the following pages.

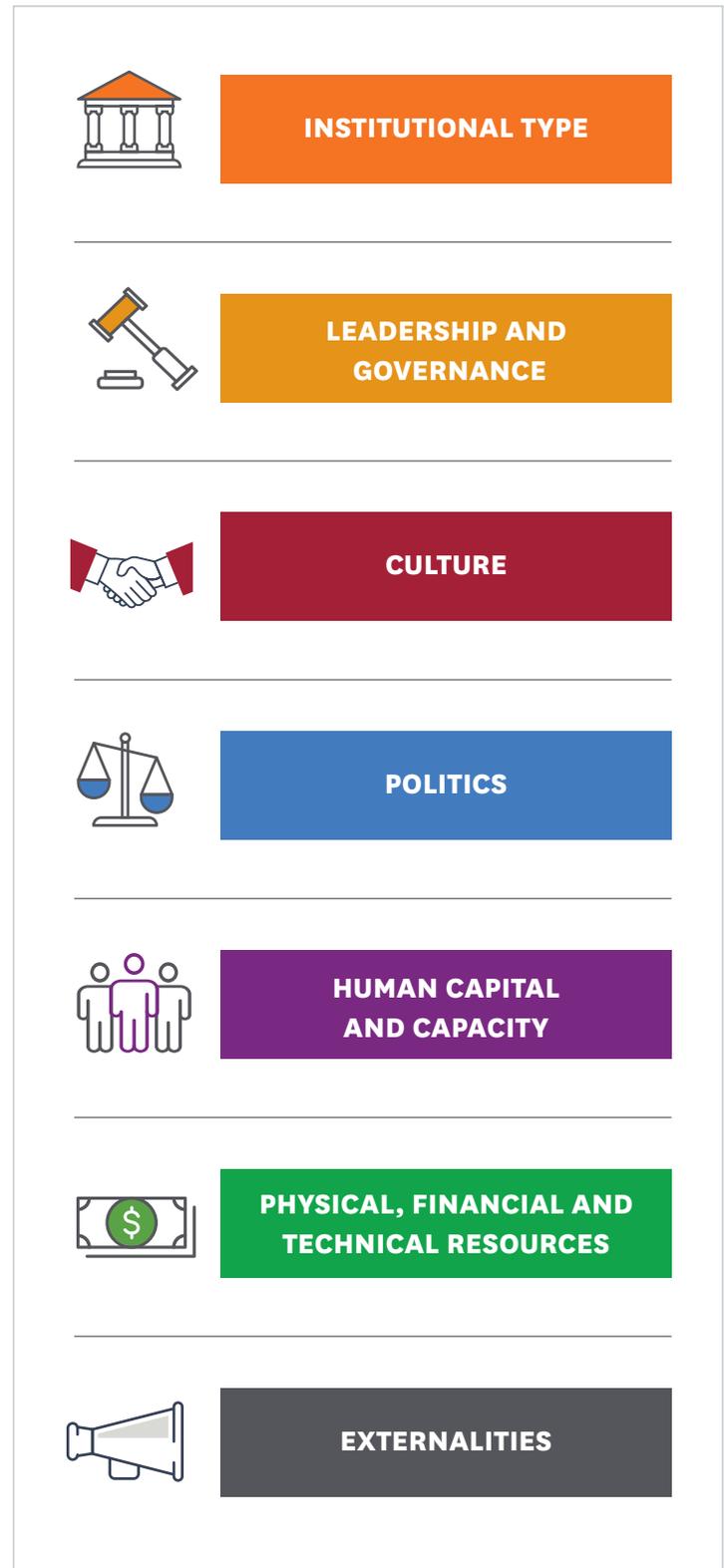


Figure 5:
Leadership Context



Institutional Type

Institutional types span the **Carnegie classification** and can range from small liberal arts colleges to larger institutions whose missions may vary. Characteristics of institutional types can include public or private control, community college, research-intensive, or regional comprehensive institutions. Similarly, institutional types can be designated based on federal grants or other historical contexts of the institution such as Historically Black Colleges/Universities (HBCUs), Hispanic Serving Institutions (HSIs), Minority Serving Institutions (MSIs), and Tribal Colleges and Universities (TCUs).

→ *Why is Institutional Type important for systemic change?*

Institutional type shapes institutional mission, team settings and composition, culture, and authority structures. For example, a community college's mission is grounded in open access for all, which will shape change initiatives differently than at a research university with a mission that focuses primarily on research and discovery. If change project outcomes infringe on, or conflict with, the institutional mission, leaders are more likely to encounter resistance in the change process. Campus size is another component of institutional type that affects Leadership Context. For instance, Communication Moves will likely look quite different on a small liberal arts campus versus a large, decentralized research university.



LEADERSHIP AND GOVERNANCE

Universities and colleges vary in their leadership and governance structures. The type of governing boards differ (from individual boards to system boards) as well as processes of shared governance (e.g., some have a faculty senate while others have a campus senate that includes faculty and staff). The relative power of faculty, staff, and administrators in decision-making also varies by campus. Some campuses have

more top-down leadership and governance structures, while others have more shared governance models, and others may be loosely coupled systems that have uncoordinated or decentralized processes of power and decision-making.

→ *Why do Leadership and Governance matter for systemic change?*

Understanding leadership and governance structures can help leaders make decisions about how to get things done. For example, a campus with a top-down leadership structure will need to ensure that senior leaders play a central role in making Vision and Strategy Moves, whereas a campus with a strong shared governance structure would need to include faculty governance bodies in making these Moves.



CULTURE

Every campus has a unique culture based on a set of shared basic assumptions, values, norms, and beliefs that shape its behavior, systems, structures, and processes. There are different levels of culture, ranging from the visible and tangible to the deeply embedded and even unconscious. It is especially important for Change Leaders to surface unconscious values or assumptions that may not be explicitly stated but nevertheless can meaningfully influence the change process.

→ *Why is Culture important for systemic change?*

Understanding the institutional culture is critical for avoiding missteps or making assumptions that fail to account for either articulated or unspoken rules, values or processes. For example, based on long-standing practices, particular forms of communicating or interacting with faculty, staff, and students might be expected of leaders in a change process. Therefore, leaders need to consider the unique ways that campus culture may influence not only what Moves to make but also how to make them.



POLITICS

Politics refers to the informal systems of influence and power that are at play on campuses which may help or hinder the achievement of organizational change goals and outcomes. While governance involves the formal system used for decision-making, it can be influenced by or overlap with more informal and often unspoken political processes. Change leaders must understand both the formal and informal channels of influence, power structures, and the key players who are involved in how these processes result in decisions being made.

→ *Why is Politics important for systemic change?*

Institutional politics provide the basis for understanding the influence and power structures which can shape leaders' every Move, from creating a vision, to communicating about change goals, to successfully sustaining changes made. It is particularly important for understanding and addressing political dynamics that can present barriers to change efforts. Being aware of the political context can inform who change agents can rely on, recruit, or mobilize as allies for change.



HUMAN CAPITAL AND CAPACITY

Another contextual category that can influence the success of change initiatives focuses on the people needed to engage in and enact the change processes. This includes not just who is involved, but also how they are recruited, incentivized, trained, and rewarded to carry out change goals. Campuses have different types of employment patterns, contractual arrangements, and opportunities for professional development. For example, faculty contracts can range from full-time tenure track to part-time contingent faculty, changing how faculty in these different groups might be engaged in a change process. Additionally, some staff are employed by the institution, while others are outsourced and employed by an outside company, so the ability to involve them in a change will also differ. Moreover, rewards and incentive systems define what is valued and shape the ability to motivate and

involve different groups in change processes. These reward systems can be leveraged or perhaps altered to support engagement, such as course releases for faculty or offering stipends for staff to participate in ways that go above and beyond their normal duties.

→ *Why is Human Capital and Capacity important for systemic change?*

Human capital and capacity can constrain or enable changes. The right combination of people with the right mix of skills is required for making change. Further, reward and incentive systems can either support or hinder change as they encourage or discourage certain behaviors on the part of change leaders. Understanding that these systems may need alteration is an important part of the context for change. For example, if participating in a change project will require additional time and labor that goes unrecognized and unrewarded, even well-meaning leaders might not participate unless incentive systems are changed.

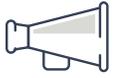


PHYSICAL, FINANCIAL AND TECHNICAL RESOURCES

This contextual category relates to an organization's financial, material, physical, and technical assets that provide resources to support change efforts. Change efforts require funding and often spaces in which new programs can operate. They may also require other material resources, such as technology, data systems, software, and other infrastructural items that might enable change.

→ *Why are Physical, Financial, and Technical Resources important for systemic change?*

Although institutional leaders and teams might be eager to start change, if capacity to support the change is not there, it will eventually stall. Recognizing what funding, spaces, data systems, technology or other material resources might be needed is important to address up front, so they do not become barriers along the way.



EXTERNALITIES

This category of Leadership Context includes any external factors that impact or influence institutions, from governmental policies or state system processes, to accreditation bodies and associations, to philanthropic, foundation, and granting agencies. For example, legislation affecting higher education funding in a state may shape ways that change could proceed. Similarly, inclusion of new accreditation standards could require changes to institutional priorities that could either align with or undermine a planned systemic change effort. Other externalities that may impede or enable change include changes to federal laws, economic development funding, or local political issues such as controversy around critical race theory. The COVID-19 pandemic was also a notable externality that significantly shaped what colleges and universities could do for years.

→ ***Why is it important to be attuned to External influences on systemic change?***

Broader societal and (inter)national contexts influence what may or may not happen on campuses. For example, during the height of the COVID-19 pandemic, national mandates influenced institutional leaders' responses to how they addressed various challenges such as meeting basic needs

and instruction modality. Many institutional change efforts already underway were paused and, as the pandemic subsided, a new external landscape emerged, resulting in the need to reframe or re-energize change efforts. Federal Higher Education Emergency Relief Fund (HEERF) funding provided opportunities for supporting students or catalyzing infrastructural advances.

While these eight categories represent the most common elements of Leadership Context faced by leaders and teams in our research, this list is not fully exhaustive. A more comprehensive overview of Leadership Context can be found in Ch.6 of *How Colleges Change: Understanding, Leading, and Enacting Change* (Kezar, 2018). For other perspectives to think about Leadership Context consider also exploring Bolman and Deal's (1988; 2021) *Reframing Organizations*, linked in our [Resource Library](#).



Levers

As leaders consider their Leadership Context, they are faced with opportunities that can amplify or accelerate change. We refer to these opportunities as Change Levers. A Change Lever is an opportunity that can be leveraged, “pulled upon,” or manipulated to advance or accelerate the desired change. Levers are typically, though not exclusively, identified through analysis of Leadership Context. To help you better understand a Lever, simply put “...a Lever is a simple machine used to move an object at one location by applying a force somewhere else. By working at a distance, a Lever acts to magnify the applied force” (American Association for the Advancement of Science, 2019, p.7). Figure 6 showcases how Levers can shift based on changes in Leadership Context. Changes in Context may make a particular Lever easier or more difficult to use.

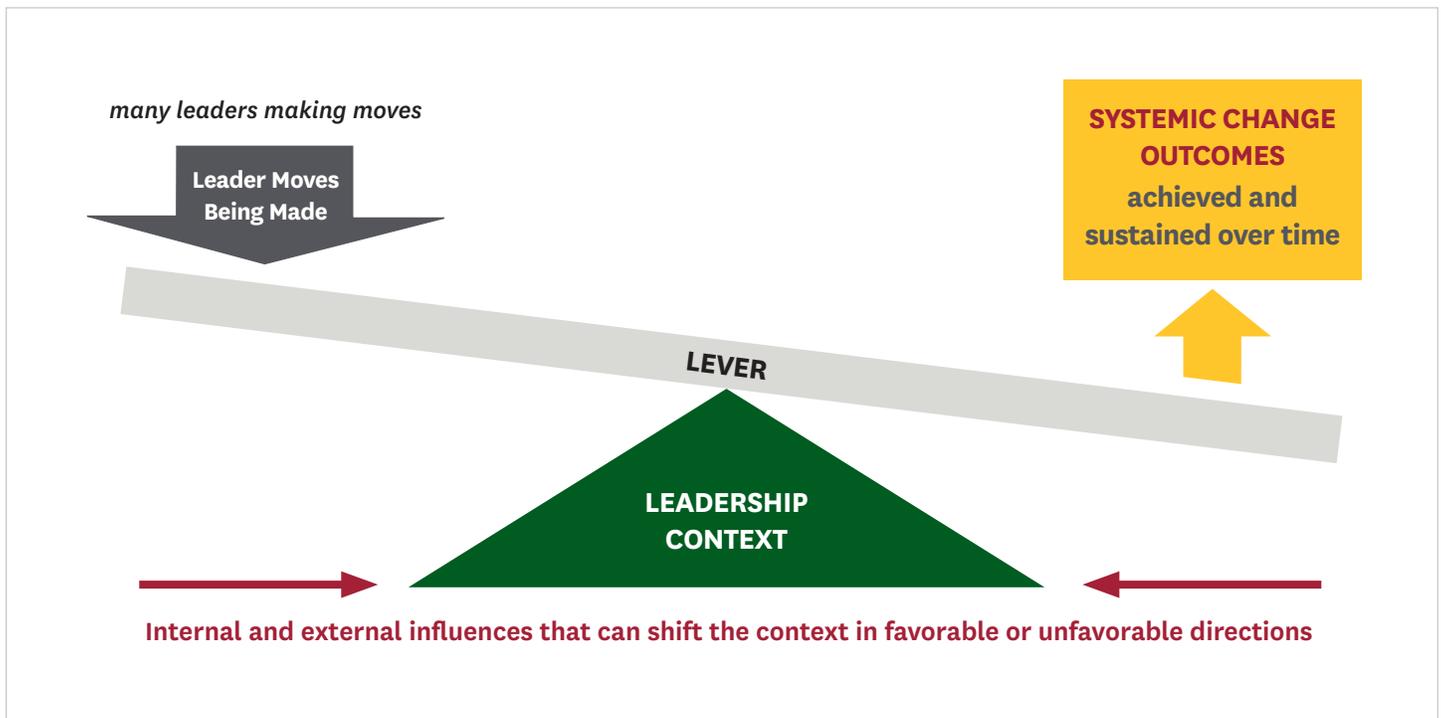


Figure 6
How Levers Can Be Used to Amplify Change

We identified a set of Levers that was based on our own research with change leaders and informed by two different publications: the recent [AAAS Levers for Change](#) (2019) publication and the Meadows (1999) Leverage Points article. Levers are associated with Leadership Context and fall into 9 categories, shown in Table 2 on the next page. It is important to note that not every Context category necessarily has Levers associated with it — however, we assume that our list of Levers is not exhaustive and there are other potential Levers that leaders could use to help accelerate their systemic change projects. We offer the list in Table 2 as a set of examples to help higher education change leaders begin to see how each Lever category might apply in their context.

Table 2
Examples of Levers Available to Campus Change Leaders

Context Category	Lever Category	Examples of Lever
Institutional Type	Institution size, sector, control, Carnegie classification, MSI designation	HSI status, community college bond, religiously based institution
Leadership and Governance, Politics	Campus (system, state) strategic plan(s), including master plan, diversity plan, and other plans	New or existing strategic plan, DEI plan, etc.
	Governance and power structures – internal and/or external	Academic senate, governing boards, councils, and committees related to the project
	Policies, practices, and structures – internal and/or external	Admissions policies, promotion, and tenure policies, hiring practices, policy audits
Culture	Campus (system) culture, norms, and networks, mission	Hierarchical or horizontal organizational structure, shared leadership approach, celebrations, anniversaries, reputation, symbols
Human Capacity and Capital	Rewards and incentive systems	Salary structures, merit pay, scholarships, equity hiring pools

Context Category	Lever Category	Examples of Lever
Physical, Financial, and Technical Resources	Funding streams and costs	Budget models and revenue sources, including state sources, endowment revenue, grants; tuition, fees, financial aid, emergency funds, food pantries, housing allowances; benefits or other employee programs
	Feedback systems	Data analytics, institutional research, advising portals, assessment systems
Externalities	Affiliations or partnerships with national associations & organizations, including regional, community, state, national or international	Accreditation agencies, influential memberships, alliances, athletic conferences, peer institutions/ aspirations, P-20 networks, national reports, partner associations, initiatives, networks

Here are a few scenarios to illustrate how Levers are being used:

- A campus leader might utilize a recent self-assessment as part of an accreditation process that identified student learning outcomes as a weakness. The leader could capitalize on this finding to further efforts on the campus to better serve students and help them succeed by having clearer learning outcomes for courses.
- If a campus is already re-examining promotion and tenure processes, leaders of change projects aimed at improving diversity, equity, and inclusion efforts might leverage this re-examination to create a vehicle for rewarding DEI work.
- A statewide policy on dual-credit high school courses may be a Lever for creating change regarding overcoming barriers to access for new student populations. Leaders can **Engage in Advocacy and Navigate Politics** around needed campus-based policy changes required to take advantage of the new statewide policy.
- A new campus budget planning process may provide a Lever for making Moves around **Develop Strategy and Resources** for getting the change effort started as well as to **Prepare for Success Over the Long Term**.
- Implementation of a new campus data dashboard technology platform may serve as a Lever that illuminates key diversity gaps in student success or faculty demographics that might help accelerate Moves in **Sensemake and Learn** as well as in **Communicate Effectively** and **Foster Diversity, Equity and Inclusion** categories regarding DEI change goals.

SECTION 4: Systemic Change Leadership Worksheets

This section of the Toolkit consists of the six Worksheets that can support you in planning for your systemic change project. The Worksheets can be completed in any order, but we recommend completing them in the order they are presented here. We also include an overview of timeline expectations for the planning process to give you a sense of how long each step of the process may take.

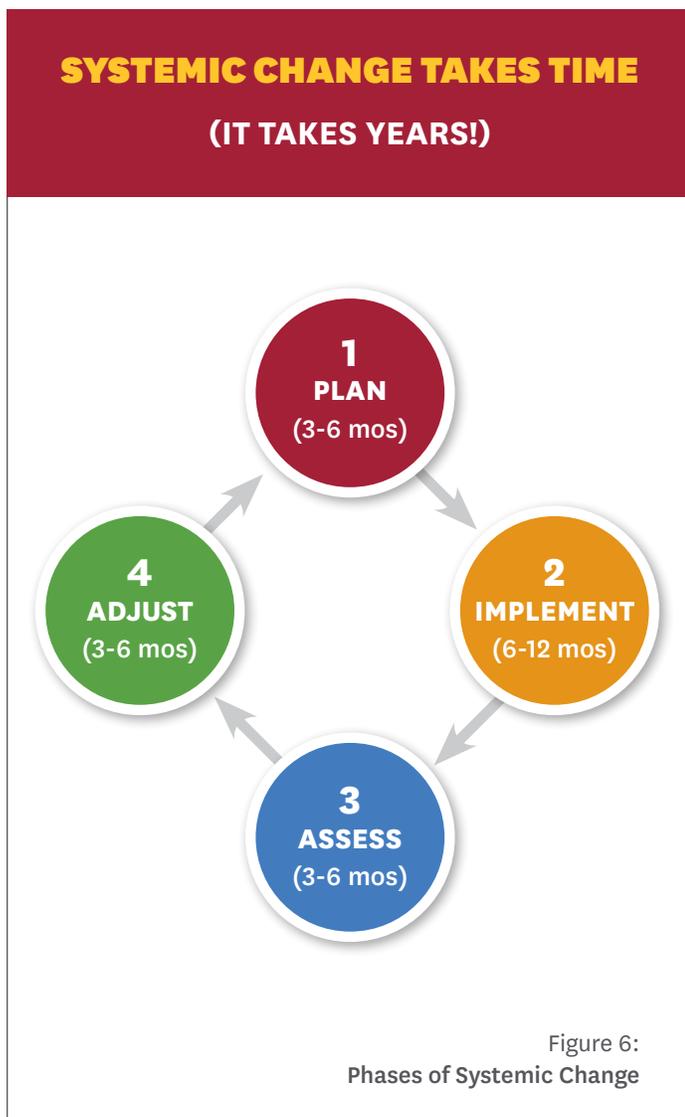
- To begin the planning process, the **Change Leader Moves Inventory Worksheet** helps you take stock of which Moves you may have already made and reflect honestly on your starting point. Whether your project is brand new or has been going on for quite some time, it is crucial to know where you are before you can figure out your next steps.
- Next, we suggest you complete the **Leadership Context Worksheet**. This worksheet will help you understand the aspects of your Context that are shaping your change landscape. As a reminder, your Context influences how you make certain Moves and also provides opportunities and barriers to the change process.
- Third is the **Levers Worksheet**, which asks you to consider the opportunities you identified within your Leadership Context and determine whether any of these opportunities could serve as Levers that can accelerate or amplify your change process.
- Fourth, the **Ecosystem Mapping Worksheet** helps you put together the pieces of your change leadership ecosystem. In this worksheet, you will bring together the Moves you have already made, relevant elements of your Leadership Context, and potential Levers. After completing this worksheet, you should have a sense of which Moves you might make next.
- Fifth, the **Change Leadership Planning Worksheet** will help you develop your systemic change leadership plan by digging deeply into the Moves and sub-Moves. You will identify exactly what they will look like in your Context, who will make these Moves, and when they will be made.
- Finally, the **Assessing Leader Moves and Process Worksheet** is designed to be used after 3-6 months of implementation to reflect on your progress and assess the efficacy of the Moves you have made.



Timeline Expectations

Systemic change takes time to accomplish, as it involves deep and meaningful change across multiple departments and divisions and not merely surface-level changes. Meaningful time should be spent in the planning phase in order to maximize the potential of making effective and lasting change. This Toolkit is designed to help teams primarily with planning, as well as assessment and adjustment of the plan as needed. For additional support with implementation, please visit our [Resource Library](#). The phases below should help you and your team develop appropriate expectations for planning and implementation timelines:

- **PLAN (3-6 months):** The first 5 Worksheets in this Toolkit are designed to support you in the planning phase: Change Leader Moves Inventory Worksheet, Context Worksheet, Levers Worksheet, Ecosystem Mapping Worksheet, Change Leadership Planning Worksheet.
- **IMPLEMENT (6-12 months):** You can use the Worksheets to guide you through the implementation process. You can also find additional supportive implementation resources in the Resource Library available on our website.
- **ASSESS (3-6 months):** The final Worksheet in this Toolkit, Assessing Leader Moves and Process Worksheet, will help you reflect on your progress and evaluate how well your Leader Moves have been working.
- **ADJUST (3-6 months):** You can revisit the first 5 Worksheets using the results of your assessment and make changes to your Context, Levers, and Moves as necessary. The process is cyclical and lasts for years!



Change Leader Moves Inventory Worksheet

This worksheet is designed to help you and your team evaluate Change Leader Moves you may have already made. Below you will examine each Move category and determine whether you have not yet taken action in this area (**N**), whether you have begun to make this Move somewhat recently (**B**), or whether this Move has been ongoing (**O**). Then in the column on the right, you will reflect on each Move category — if you have made this Move, how effective has it been? If you haven't yet made this Move, why not? Taking stock of what you have already done will help you evaluate where you are and determine what steps to take next.

We recommend that leaders and teams complete this worksheet first. Review the Move Categories in the first column, then put the status (**N**, **B** or **O**) in the second, and finally reflect on your responses in the third column.

Move Category	Move Made?	Reflection on Move
<p>Description of each Leader Move category</p>	<p>Identify status of each Leader Move category</p> <ul style="list-style-type: none"> → No Action (N) → Beginning Action (B) → Ongoing Action (O) 	<p>If you have made this Move, how effective was it?</p> <p>If you haven't yet made this Move, why not?</p>
<p>CREATE VISION, EXPECTATIONS AND PACING</p> <p>These Moves result in the development and articulation of a shared vision drawing widely from campus stakeholders as well as articulation of goals, outcomes, and timing. This vision is most successful when aligned with the institution's mission and must be cognizant of prior relevant systemic change efforts (successful or otherwise).</p>		
<p>DEVELOP STRATEGY AND RESOURCES</p> <p>These Moves result in the development of an appropriate set of plans that include equitable actions to reach the desired vision as well as organization of revenue (with an eye/lens on who is impacted), infrastructure, and people resources needed to be successful.</p>		

Move Category	Move Made?	Reflection on Move
<p>Description of each Leader Move category</p>	<p>Identify status of each Leader Move category</p> <ul style="list-style-type: none"> → No Action (N) → Beginning Action (B) → Ongoing Action (O) 	<p>If you have made this Move, how effective was it?</p> <p>If you haven't yet made this Move, why not?</p>
<p>FOSTER DIVERSITY, EQUITY AND INCLUSION</p> <p>These Moves ensure attention to diversity, equity, and inclusion (DEI) throughout the initiative. They involve using a DEI lens to situate the work, develop strategies, address cultural issues, and ensure the inclusion of diverse voices and perspectives across social identities (e.g. women, BIPOC, 1stGen, etc.), positional identities (e.g. student, faculty, staff) and other constituents' interests (e.g. community members).</p>		
<p>LEAD PEOPLE AND TEAMS</p> <p>These Moves result in the development of high-functioning individuals and teams that drive success in any systemic change initiative. Leadership teams should be diverse not just in terms of disciplinary background or expertise but also social identities and life experience. They should be organized with expertise and perspectives focused on the change goals, inclusive of appropriate stakeholders, and attentive to the development and empowerment of leaders.</p>		

Move Category	Move Made?	Reflection on Move
<p>Description of each Leader Move category</p>	<p>Identify status of each Leader Move category</p> <ul style="list-style-type: none"> → No Action (N) → Beginning Action (B) → Ongoing Action (O) 	<p>If you have made this Move, how effective was it?</p> <p>If you haven't yet made this Move, why not?</p>
<p>ENGAGE IN ADVOCACY AND NAVIGATE POLITICS</p> <p>These Moves relate to understanding the dynamics of power and influence (informal and formal) and how to navigate them to achieve change goals, from recruiting key influencers to changing the minds of skeptics to making the case to those in decision-making positions. These Moves also include effectively advocating for the change to various audiences in order to gain support and foster success.</p>		
<p>COMMUNICATE EFFECTIVELY</p> <p>These Moves result in strong communication about the change initiative, both internally and externally. Effective communication includes crafting messages that inclusively engage stakeholders in conversations, telling meaningful stories, and soliciting and listening to feedback to amplify the voices of change makers.</p>		

Move Category	Move Made?	Reflection on Move
<p>Description of each Leader Move category</p>	<p>Identify status of each Leader Move category</p> <ul style="list-style-type: none"> → No Action (N) → Beginning Action (B) → Ongoing Action (O) 	<p>If you have made this Move, how effective was it?</p> <p>If you haven't yet made this Move, why not?</p>
<p>SENSEMAKE AND LEARN</p> <p>These Moves involve using data and information to understand perceptions, raise consciousness, and to bridge gaps in current and needed knowledge and understanding to ensure strong organizational learning and development.</p>		
<p>PREPARE FOR SUCCESS OVER THE LONG TERM</p> <p>These Moves result in long-term project success and include ensuring ways to measure success and maintain momentum, identifying appropriate infrastructure required to scale and sustain the change (e.g., budget, policy, process, physical plant), building motivation and emotional support, understanding the human toll of change, and identifying next steps beyond the current project.</p>		

Leadership Context Worksheet

This worksheet will help you think about your Leadership Context. As a reminder, Leadership Context shapes which Moves you make and how you make them, as well as provides opportunities and barriers to navigate as the change process unfolds. We recommend that leadership teams consider these seven areas of Leadership Context: **institutional type**; **leadership and governance**; **culture**; **politics**; **human capital and capacity**; **physical, financial and technical resources**; and **externalities**.

This worksheet first features a set of reflection questions for teams to consider in each area of Leadership Context. We don't imagine that every team needs to answer every question—these are merely examples to get you started with reflecting on each area of Context. After your team has a discussion around each area of Context, please fill out the Leadership Context chart. In this chart, you will first describe your own context in each area that is relevant for your project. For example, for Institution Type you might write: “large, research 1 university, public, state flagship, urban location, HSI.” Next, you will note whether any aspects of your context present either opportunities or barriers to your systemic change project. For example, you might determine that your Institution Type serves as an opportunity: “Our HSI status presents an opportunity as we are eligible for a new category of grant funding based on that status which could support our change project.” Or your Institution Type could serve as a barrier to your change project: “Our R1 status means that

teaching is less valued on our campus, which is a barrier to our goals of improving undergraduate STEM teaching.” Please note that you may not see an opportunity or barrier in every aspect of Context — that's OK! Sometimes Context matters just in terms of shaping which Moves you might make or how you go about enacting a certain Move.

We recommend that leaders and teams complete this worksheet second, after the Change Leader Moves Inventory. Use the reflection questions as discussion prompts for your team to consider different aspects of each Context category in relation to your change initiative. You do not have to answer all of the reflection questions, they are simply a tool to help you think about your context from a variety of different angles. Once you have discussed your Context, then use the chart below to describe relevant contexts and identify whether they are opportunities or barriers.

LEADERSHIP CONTEXT REFLECTION QUESTIONS

INSTITUTIONAL TYPE

1. What is your Carnegie Classification (e.g., R1, R2, Master's, etc.) and how might that designation shape your context for change?

2. Does your campus have any other designations that provide additional context (e.g., Hispanic-serving, AANAPISI, rural-serving, religious affiliated)?

3. Is your campus a public or private institution? How might that shape your context for change?

4. Does the location of your campus play a role in setting the context for change?

5. How might the size (small vs large) of your campus shape creating a shared vision, importance of relationships, communications, sensemaking, politics?

6. How might planning differ based on your size? (e.g. multiple plans for larger campus, one plan for smaller.)

LEADERSHIP & GOVERNANCE

1. If your campus has a governing board, how might the board and its approach, policies or engagement either help or hinder your change process? If there is a board, how does that impact leadership, policies, strategies on your campus?

2. Is there more or less leadership turnover (administrative and faculty) on your campus and how might this shape your change process? Are there new or emerging leaders that might be helpful (or not) to your change process?

3. How are decisions made? What is the governance structure like and how can it be used to support change, or will it be a source of resistance? Are there particular committees or governance structures that need to be engaged in your change process?

4. Can students be collaborators and supporters for change and change moves?

5. Are there organizational reporting lines, ways campuses are organized into separate units, or unit structures that might serve as opportunities or barriers to your change process?

6. Are there existing strategic or other plans that might aid you in your change process?

7. Do you need succession planning or professional development to ensure there are enough people to lead?

CULTURE

1. How might your campus mission be drawn upon to support change? How might the research or teaching mission be a barrier or facilitator of changes?

2. What issues about campus are critical to know to move forward — demographics of student population, urban or rural-serving mission, collective bargaining agreement?

3. How might teams be shaped by openness or lack of openness to new ideas? How might many different ideas in a change process (often on larger campuses) create conflict? Does your campus size or culture play a role? How might a small campus environment inhibit brainstorming and diverse ideas with a culture of consensus and homogeneity? How might facilitation help?

4. Is the campus culture siloed and bureaucratic? Is it more collaborative? How will this affect moves like communication, team building, navigating politics, and sensemaking?

5. Have there been other change initiatives? Is your campus suffering from “initiative fatigue” or will it be receptive to the change process?

POLITICS

1. How are budget and resource decisions made and how will that affect your change process and outcomes?

2. Does unionization impact the political landscape, possibilities for professional development, leadership work and any other issues related to the change process and moves?

3. What are sources of resistance in your context? How does lack of turnover at small campuses create some embedded resistance? Unions? Alumni? State legislatures or state politics? How might these create politics that need to be navigated?

4. Who are the influencers, allies, skeptics on campus — individuals, or formal or informal groups? How might they be used to advance your change process and outcomes?

5. What are the agendas of various stakeholders (some may be hidden)? What are the unspoken rules or long-standing traditions or processes that may be helpful or a hindrance?

HUMAN CAPITAL & CAPACITY

1. How do promotion, tenure, merit, and reward structures shape possibilities for change? How might they be changed to better support change and Leader Moves?
2. How do leaders motivate faculty and staff? Can a small campus appeal to mission? Can a tuition-dependent campus use a crisis in enrollment to motivate change? Can a large campus create change based on faculty interests or passion or research areas of interest?
3. Do you have the right faculty in place to enact change? Are change efforts being driven primarily by adjunct faculty who may not have the capacity in their workloads? How can you create a good mix of different types of faculty who are engaged? What staff are passionate about the project and how might they be engaged? What about student capacity to serve on task forces and provide key insights?
4. What accountability systems are in place — from state, board, administration? Do they support the change? How can they be in support of Leader Moves? Do they need to be better aligned? Are they in conflict with the change?
5. What type of professional development does the campus have? How is it aligned with the change? How can professional development support Leader Moves — for example, sensemaking or teamwork?

PHYSICAL, FINANCIAL AND TECHNICAL RESOURCES

1. What is your institutional research capacity like? Does it need to be built to better enable or support your change? How do you have access to institutional data?
2. Do you have the classroom or program space available for the modified or new programs? Are there other facilities issues that need addressing or planning?
3. Do you have space for the team to meet, offices to house personnel?
4. What is the resource environment like on your campus? For campuses with fewer resources, can you draw on support from the state system, federal grants or other grants and philanthropic sources? What sources of support might exist for special mission campuses? How might change be tied to increasing enrollments in tuition dependent campuses? How might the financial model hinder or help the change?
5. Do you have the technology, facilities or other infrastructure support to execute the change? Can technology be leveraged to support teams, communication, planning, and other moves? Is a lack of technology a source of resistance or potential block to the change? Are facilities appropriate to the goals?

EXTERNALITIES

1. Are there state or federal policies or programs that are related to the change?

2. What initiatives, organizations or businesses in your community are related to the change you are trying to achieve?

3. If your campus is public or part of a state system, are there messages, policies and priorities that can be drawn on to support changes?

4. Is your campus a member of a national association that has initiatives you might participate in that will help you advance your change, gain momentum and support?

5. Are there state, federal, or philanthropic organizations that have grant programs aligned with your change goals? Do you have any major donors that can be engaged in your change project to support your goals?

6. Is your campus or the programs involved in the change project up for re-accreditation or accreditation? Can these processes or organizations be leveraged to support your change goals?

7. Does your campus have goals to advance in any Carnegie classifications or national/ regional rankings that may provide opportunities aligned with your change goals?

LEADERSHIP CONTEXT SUMMARY CHART			
CONTEXT CATEGORY	DESCRIPTION OF YOUR RELEVANT CONTEXT	OPPORTUNITY? (IF YES, EXPLAIN HOW)	BARRIER? (IF YES, EXPLAIN HOW)
Institutional Type			
Leadership & Governance			
Culture			
Politics			
Human Capital & Capacity			
Physical, Financial, and Technical Resources			
Externalities			

Levers Worksheet

As a reminder, a Lever is an opportunity that can be “pulled upon” or manipulated to accelerate your systemic change. Levers are typically, though not exclusively, identified through analysis of Leadership Context. Think of them as “actionable opportunities.” You can look at your Leadership Context Worksheet for categories where you identified potential opportunities as a starting point to help you identify Levers.

In this worksheet, please select at least one Lever (but no more than 3) that you might use to amplify your systemic change efforts. For each Lever category you select, make sure to note what this Lever will look like in your context and how specifically you will use it. For example, you might select the Lever “*Campus (system, state) strategic plan(s), including master plan, and other plans*” under the “*Leadership, Governance, and Politics*” Context category. When you fill out the third column of the worksheet that corresponds with this Lever, you might write something like “*Our goal of supporting first-year transition for students in STEM is aligned with strategic goal 2 in our campus’s new strategic plan. There is also extra funding attached to initiatives that are directly linked to strategic goals. We will leverage this connection to build our initiative into the strategic plan, which gives us more legitimacy and also potential access to these strategic funds.*”

We recommend that leaders and teams complete this worksheet third, after the Leader Moves Inventory Worksheet and the Leadership Context Worksheet. Use the chart below to record levers in relevant categories with a short description. It is common just to use 1 or 2 levers so no need to fill the whole chart out.

IDENTIFYING LEVERS WORKSHEET			
CONTEXT CATEGORY	LEVER CATEGORIES	EXAMPLES OF LEVER	WHAT WILL THIS LEVER LOOK LIKE FOR US AND HOW WILL WE USE IT?
Institutional Type	Institution size, sector, control, Carnegie classification, MSI designation	HSI status, community college bond, religiously based institution	
Leadership & Governance, Politics	Campus (system, state) strategic plan(s), including master plan, diversity plan, and other plans	New or existing strategic plan, DEI plan, etc.; relationship to change goals	
	Governance and power structures — internal and/or external	Academic senate, governing boards, councils, and committees related to the project	
	Policies, practices, and structures — internal and/or external	Admissions policies, promotion, and tenure policies, hiring practices, policy audits	

IDENTIFYING LEVERS WORKSHEET			
CONTEXT CATEGORY	LEVER CATEGORIES	EXAMPLES OF LEVER	WHAT WILL THIS LEVER LOOK LIKE FOR US AND HOW WILL WE USE IT?
Culture	Campus (system) culture, norms, and networks, mission	Hierarchical or horizontal organizational structure, shared leadership approach, celebrations, anniversaries, reputation, symbols	
Human Capacity and Capital	Rewards and incentive systems	Salary structures, merit pay, scholarships, equity hiring pools	

IDENTIFYING LEVERS WORKSHEET			
CONTEXT CATEGORY	LEVER CATEGORIES	EXAMPLES OF LEVER	WHAT WILL THIS LEVER LOOK LIKE FOR US AND HOW WILL WE USE IT?
Physical, Financial and Technical Resources	Funding streams and costs	Budget models and revenue sources, including state sources, endowment revenue, grants; tuition, fees, financial aid, emergency funds, food pantries, housing allowances; benefits or other employee programs	
	Feedback systems	Data analytics, institutional research, advising portals, assessment systems	

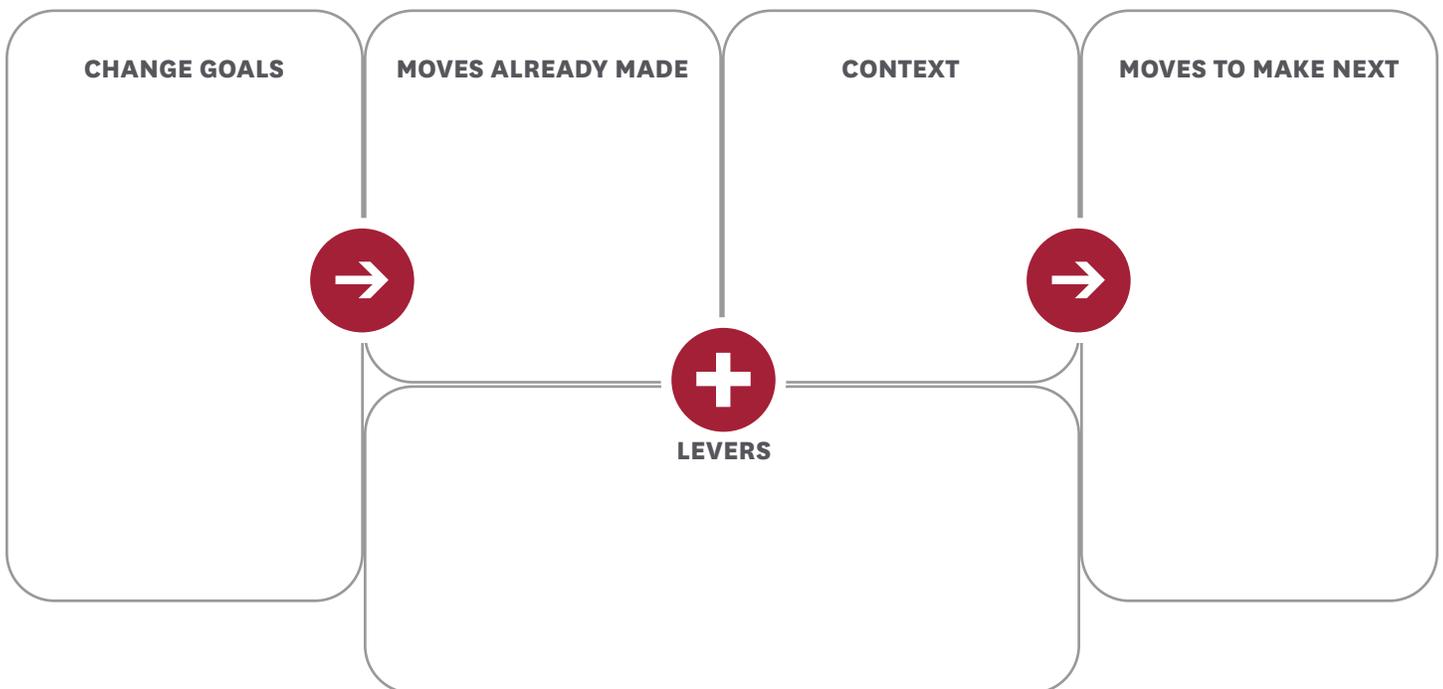
IDENTIFYING LEVERS WORKSHEET			
CONTEXT CATEGORY	LEVER CATEGORIES	EXAMPLES OF LEVER	WHAT WILL THIS LEVER LOOK LIKE FOR US AND HOW WILL WE USE IT?
Externalities	Affiliations or partnerships with national associations & organizations, including regional, community, state, national or international	Accreditation agencies, influential memberships, alliances, athletic conferences, peer institutions/ aspirations, P-20 networks, national reports, partner associations, initiatives, networks	
OTHER			

Ecosystem Mapping Worksheet

Now it's time to map out your Change Leadership Ecosystem! Each of the previous worksheets has helped you evaluate different parts of your Ecosystem, and now it's time to put those pieces back together. Completing this worksheet should help you identify which Moves to make next.

In the box on the left, "Change Goals," please make a note of your systemic change goals. These are important to note here just to ensure that the Context areas and Levers you identify truly align with your goals. In the three middle boxes, you will take the results from the previous 3 worksheets and fill them in here. In the "Moves Already Made" box, you will fill in the Moves from the Change Leader Moves Inventory Worksheet that you marked with a B or O (for Beginning or Ongoing action)--no need to put in the Moves you have not yet made (N). In the "Context" box, put in the 2 or 3 Context areas that are most relevant for your project from the Leadership Context Worksheet. And in the "Levers" box, make note of the Lever(s) that you identified in the Levers Worksheet. The box on the right, "Moves to Make Next," is a space for you to brainstorm which Moves you and your team should make next. There are also reflection questions that follow the Ecosystem Map that can help you decide which Moves should be next. It might be helpful to consider that Levers can help you pick or prioritize which Moves you make, and your Context can shape how Moves are made.

Before you start this worksheet, make sure you have completed: (1) Change Leader Moves Inventory Worksheet; (2) Leadership Context Worksheet; and (3) Levers Worksheet. Use the chart to capture your change goals and summaries of your Change Leader Moves Inventory, Leadership Context, Levers and Moves you might consider prioritizing for next steps.



ECOSYSTEM MAPPING REFLECTION QUESTIONS

PLANNING YOUR NEXT MOVES

1. Based on your Ecosystem Map, what are the next 2-3 Moves that emerge as your priorities?
Consider which Moves have not been made or which Moves may need to be advanced more? For example, if you haven't yet established a shared vision, perhaps you should prioritize Moves in the Vision category.
2. How does your Leadership Context shape the next Moves you need to make? Or how might it shape the way you make these Moves? For example, your Political Context might shape the way you approach Communication Moves.
3. How do the Levers you identified influence the Moves you might make next? For example, if you identified Funding Streams and Costs as a potential Lever because your campus has the opportunity to apply for HSI-specific grants, perhaps your next Moves should be in the Strategy and Resources category to focus on securing those funds.

Change Leadership Planning Worksheet

This worksheet will help you create your Change Leadership Action Plan. In your Ecosystem Map, you identified the Moves you need to make next. Below, you will reflect more deeply on those Moves and what they will look like in action. First, go to the row for the Move you want to make next. Think about **HOW** your Context might shape this particular Move and take some notes in the first blank column. Next, reflect on **WHAT** sub-Moves should be made within this Move category. For example, if you selected the Create Vision, Expectations, and Pacing category, you might need to make several specific sub-Moves in order to actually create your vision. You can look at the Moves and sub-Moves [chart](#) we included earlier in this document to give you ideas for this category. Next, think about **WHICH** specific steps you should take to enact this Move or sub-Move. While the sub-Moves are more specific and focused than the broader Move categories, you will need to break them down further into even more specific actionable steps that you and your team can take to execute them. Finally, you should think about **WHO** should make this Move, **WHEN** the Move should be made, and **HOW** you will know the Move has been successful, and fill out the corresponding boxes accordingly. Here is an example of what it might look like for a team focused on the Develop Strategy and Resources category:

EXAMPLE PLAN

Change Leader Move Categories	HOW will your Context shape this Move?	WHAT sub-Move(s) should be made?	WHICH specific steps do we need to take to enact this sub-Move/Move?	WHO should make this Move?	WHEN should this Move be made?	HOW will we know this Move has been successful?
DEVELOP STRATEGY AND RESOURCES	Relevant Context here is Physical, Financial and Technical Resources (we have strategic plan funding available that we can use, but otherwise we are resource-constrained, likely need grant funding to support)	Obtain new or reallocate existing resources, including fundraising, grant writing	Complete application for strategic plan funding and submit to ABC office	EH	12/1/24	Submit proposal & obtain funding
		Obtain new or reallocate existing resources, including fundraising, grant writing	Work with grants office to complete and submit NSF proposal	AG	11/19/24	Submit proposal & obtain funding

YOUR PLAN

Change Leader Move Categories	HOW will your Context shape this Move?	WHAT sub-Move(s) should be made?	WHICH specific steps do we need to take to enact this sub-Move/Move?	WHO should make this Move?	WHEN should this Move be made?	HOW will we know this Move has been successful?
CREATE VISION, EXPECTATIONS, AND PACING						

YOUR PLAN

Change Leader Move Categories	HOW will your Context shape this Move?	WHAT sub-Move(s) should be made?	WHICH specific steps do we need to take to enact this sub-Move/Move?	WHO should make this Move?	WHEN should this Move be made?	HOW will we know this Move has been successful?
DEVELOP STRATEGY AND RESOURCES						

YOUR PLAN

Change Leader Move Categories	HOW will your Context shape this Move?	WHAT sub-Move(s) should be made?	WHICH specific steps do we need to take to enact this sub-Move/Move?	WHO should make this Move?	WHEN should this Move be made?	HOW will we know this Move has been successful?
FOSTER DIVERSITY, EQUITY AND INCLUSION						

YOUR PLAN

Change Leader Move Categories	HOW will your Context shape this Move?	WHAT sub-Move(s) should be made?	WHICH specific steps do we need to take to enact this sub-Move/Move?	WHO should make this Move?	WHEN should this Move be made?	HOW will we know this Move has been successful?
LEAD PEOPLE AND TEAMS						

YOUR PLAN

Change Leader Move Categories	HOW will your Context shape this Move?	WHAT sub-Move(s) should be made?	WHICH specific steps do we need to take to enact this sub-Move/Move?	WHO should make this Move?	WHEN should this Move be made?	HOW will we know this Move has been successful?
ENGAGE IN ADVOCACY AND NAVIGATE POLITICS						

YOUR PLAN

Change Leader Move Categories	HOW will your Context shape this Move?	WHAT sub-Move(s) should be made?	WHICH specific steps do we need to take to enact this sub-Move/Move?	WHO should make this Move?	WHEN should this Move be made?	HOW will we know this Move has been successful?
COMMUNICATE EFFECTIVELY						

YOUR PLAN

Change Leader Move Categories	HOW will your Context shape this Move?	WHAT sub-Move(s) should be made?	WHICH specific steps do we need to take to enact this sub-Move/Move?	WHO should make this Move?	WHEN should this Move be made?	HOW will we know this Move has been successful?
SENSEMAKE AND LEARN						

YOUR PLAN

Change Leader Move Categories	HOW will your Context shape this Move?	WHAT sub-Move(s) should be made?	WHICH specific steps do we need to take to enact this sub-Move/Move?	WHO should make this Move?	WHEN should this Move be made?	HOW will we know this Move has been successful?
PREPARE FOR SUCCESS OVER THE LONG TERM						

Assessing Leader Moves and Process Worksheet

An important part of planning for systemic change and sustaining change is frequently assessing the process and making changes as necessary. This worksheet contains reflection questions that will help you consider the Moves you have made, how successful they have been (or not), which Moves you might make next, how your Levers have helped your change process, and how your Context may have changed. We recommend using this worksheet every 3-6 months or so to help you keep tabs on your progress and make adjustments as necessary. You can also go back to any of the other worksheets in the CLT as your project progresses and re-do them based on where you are now.

WHICH LEADER MOVES WERE SUCCESSFUL? WHY?

WHICH LEADER MOVES WERE NOT SUCCESSFUL? WHY NOT?

WHAT PROGRESS HAVE YOU MADE ON YOUR CHANGE GOALS?

**HOW HAS THE LEVER(S) YOU IDENTIFIED HELPED ADVANCE YOUR SYSTEMIC CHANGE GOALS?
ARE THERE NEW LEVERS TO CONSIDER?**

**HAS YOUR LEADERSHIP CONTEXT CHANGED SINCE YOU BEGAN YOUR PROJECT OR SINCE YOU LAST
ASSESSED YOUR PROGRESS? DO YOU ANTICIPATE ANY MAJOR SHIFTS IN CONTEXT IN THE NEXT 3-6 MONTHS?**

**HOW WILL YOUR PLAN CHANGE FOR THE COMING 3-6 MONTHS? WHICH MOVES WILL YOU/YOUR TEAM
MAKE? REVISIT THE CHANGE LEADERSHIP PLANNING WORKSHEET TO CREATE A REVISED PLAN.**

SECTION 5: Additional Systemic Change Leadership Resources

Our website contains additional systemic change leadership resources to support you and your team as you embark on your systemic change journey. First, we published a series of Case Studies to help leaders understand the Toolkit in action. These Case Studies represent different institutional types and change projects and provide insight into how leaders in various roles and with different levels of agency made certain Leader Moves and pulled particular Levers to achieve their project outcomes. Visit <https://pullias.usc.edu/clt-case-studies/> to access the Case Studies. Second, we put together a comprehensive Resource Library where we link specific tools and a reading list that can help assist in the systemic change process. There are resources and tools that focus broadly on the systemic change process, as well as resources that align with specific Change Leader Moves. Visit <https://pullias.usc.edu/project-page/toolkit-resource-library/> to access our Resource Library.

CONCLUSION

The late Supreme Justice Ruth Bader Ginsburg reminds us that “Real change, enduring change, happens one step at a time.”

As shown in this Toolkit, what makes change happen is taking a series of steps toward that change. It requires patience, planning, learning, and stamina. As external and internal forces continue to require higher education institutions to change, action-oriented resources such as this Toolkit will be of immense value to leaders enacting systemic change. Whether it is adopting a statewide policy for student success or addressing tenure and promotion practices for women in STEM, systemic goals will require change agents to engage in a series of specific actions to achieve change. Leaders who supported the development of this Toolkit and those who participated in the Case Studies echo the need for resources like this one that provide a roadmap for leaders at every level to use in leading change.

The Change Leadership Toolkit offers guidance to help change agents transform their institutions as they tackle complex challenges and work to improve higher education. We are optimistic about the prospects for the future for the leaders who take this bold path and engage in ongoing systemic change work.

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