

Shared Equity Leadership Start-Up Toolkit



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Introduction to Shared Equity Leadership Start-Up Toolkit

Shared Equity Leadership (SEL) is a collaborative approach to equity leadership in which responsibility for diversity, equity, and inclusion (DEI) work is shared broadly across campus instead of siloed in a single office or under a single leader.

SEL creates a critical mass of faculty, staff, and administrators who collectively lead equity work and are supported through institutional processes, policies, and structures. It is designed to help move campuses, in a collective approach and spirit, to meet existing or emerging equity goals and to instigate deep cultural change regarding how leadership is exercised and how equity objectives are realized.

The SEL model entails three main elements: (1) **a personal journey** toward critical consciousness in which leaders solidify their commitment to equity; (2) a set of shared **values** that center equity and guide the work; and (3) a set of **practices** that leaders enact collectively to change inequitable structures. By distributing the work across campus and embedding equity-mindedness into all sorts of different roles and functions, SEL moves away from siloed, performative/symbolic approaches to DEI work and starts to change culture on campus. This model builds on ideas of equity-minded leadership (Dowd & Bensimon, 2015) and shared leadership (Pearce & Conger, 2003; Kezar & Holcombe, 2017; Holcombe et al, 2021).

Because shared or collaborative approaches to leadership differ from traditional hierarchical ways of operating in higher education, it can be tricky for leaders to know what steps to take to implement an SEL approach on their own campuses. How do you include more people in this work? Who should be included? How do you convince people that this approach is important? How do you navigate challenges and potential opposition (both on campus and

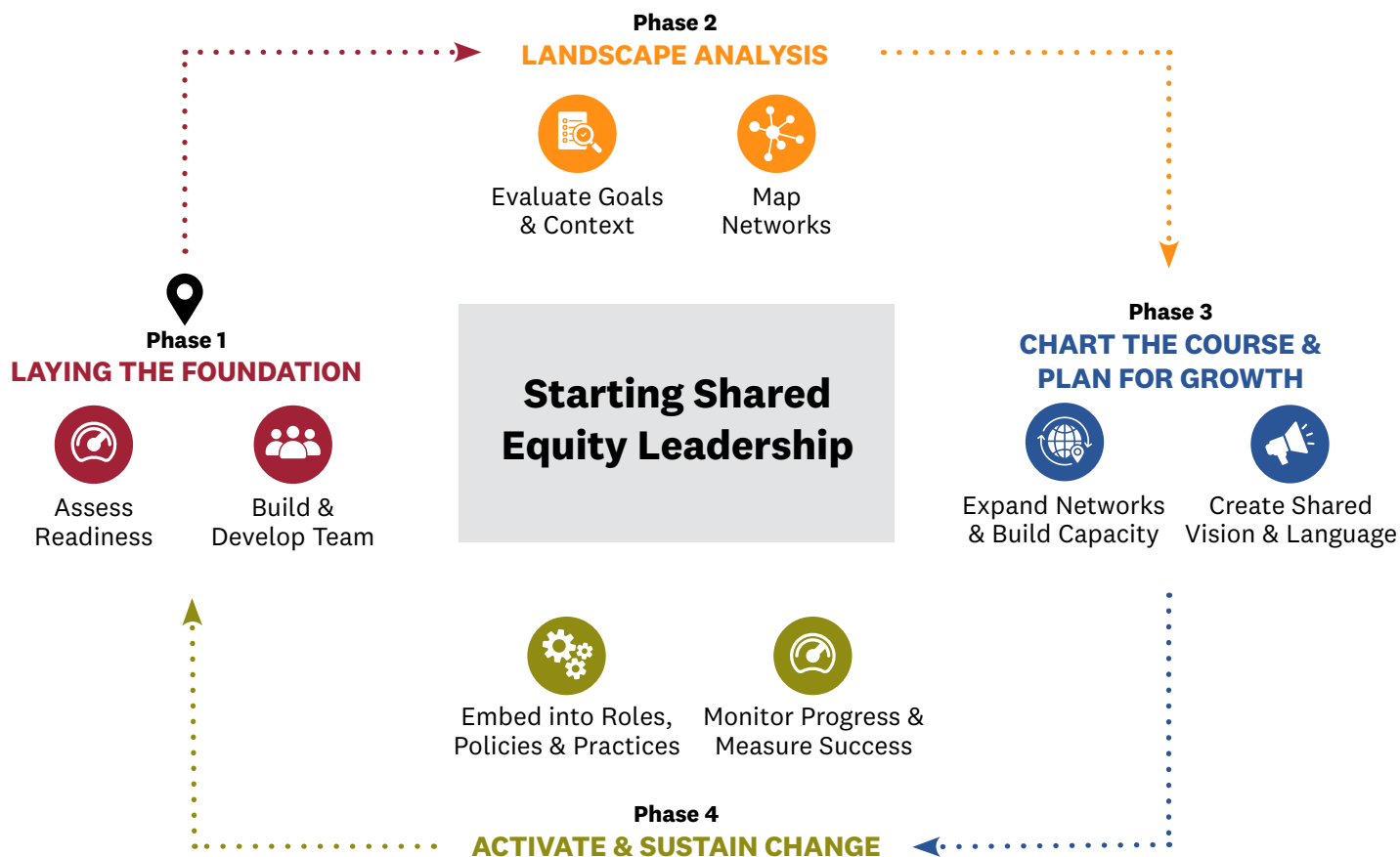
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This SEL Start-Up Toolkit will guide you through the process of implementing SEL on your campus. It builds upon previous tools and resources developed by Pullias Center researchers.

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in the broader cultural/political landscape)? This SEL Start-Up Toolkit will guide you through the process of implementing SEL on your campus. The tools and resources in this guide are informed by research and consultation with dozens of campuses across the country from 2020-2026. It builds upon previous tools and resources developed by Pullias Center for Higher Education but is specifically designed to be a comprehensive guide for beginning to implement SEL.

The toolkit is divided into four sections or phases which align with the process of starting SEL. Each phase contains two steps. These steps are dynamic, and we anticipate that you and your team will pause, reflect, and revisit them periodically throughout the implementation process. In the first phase, **Laying the Foundation**, you will take stock of your readiness to implement SEL using the Assess Readiness tool and begin to create your team through the Build and Develop the SEL Leadership Team tool. In the second phase, **Landscape Analysis**, you will assess your current landscape for change using the Evaluate Goals and Context tool and identify current pockets of equity work using the Map Networks tool. In the third phase, **Chart the Course and Plan for Growth**, you will build on your landscape analysis as you clarify your approach using the Create Shared Vision and Language tool and recruit others to the work using the Expand Networks and Build Capacity tool. The fourth phase, **Activate Change**, will support you as you create concrete changes using the Embed SEL into Roles, Policies, and Practices tool and monitor your progress using the Monitor Progress and Measure Success tool. The graphic below shows a visual representation of this process:



Behind the Design of the Toolkit and How to Approach It

SEL is a collective leadership approach, and we have designed this toolkit to be completed in a similar manner: with others, in community. We designed it with the busy, yet committed and deeply curious leader-practitioner in mind. This toolkit is intended for leaders intrigued by SEL and interested in starting it up on their respective campuses. Thus, it contains activities and reflection questions that will lead to careful introspection, analysis, action, and strategy.

The phases were designed to be ideally completed during a two-hour meeting or even a retreat. However, we trust that teams will consider the most effective way to distribute this content, whether through a concentrated retreat over a week, throughout a semester, or across the academic year.

As a reminder, your objective is not to develop an entirely new equity plan or additional equity outcomes for your campus. Instead, SEL works most effectively to support your already established plans, goals, and outcomes, whether in a strategic plan, mission, long-term vision, or in a state mandate. Engaging in the activities outlined in this toolkit will help you expand your SEL team beyond just a curious and committed few, support alignment and anchoring, ensure stakeholder buy-in, deepen your understanding of your campus context and landscape, and lead to the development or refinement of capacity-building activities (such as professional development). It may even prompt revisions to current practices, policies, and role expectations. Throughout this work, you will be prompted to reflect on and re-evaluate your goals and context to ensure that the work you do is aligned and that it reflects the rapidly shifting higher education landscape.

If you have not already done so, we suggest that you explore the SEL resources available on the Pullias Center's [website](#). In particular, we have published seven reports on different aspects of SEL that can deepen your understanding of what this work looks like both conceptually and in practice.

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Laying the Foundation

Welcome to the beginning of your Shared Equity Leadership journey! You may be coming to this toolkit from a variety of different places in terms of your readiness to get started with SEL. This section will help you gauge your campus's strengths and areas for growth and set you up for success as you start to implement SEL. Step 1, Assess Readiness, will help you reflect on your organizational readiness in several different areas including leadership support, resources, and your own skills in terms of facilitation and leading change. We highly suggest completing Step 1, even if you have already made some progress in implementing SEL on your campus. This exercise will help you identify gaps you may not have considered. The exercises and activities in Step 2, Build and Develop the SEL Leadership Team, may or may not be necessary for you depending on whether you are picking up this guide with a preexisting team. If you have already formed your team, you may still find it useful to reflect together on your strengths and expertise in Exercises 2.1 and 2.2. In Exercise 2.3, Explore SEL Together, team members can reflect on areas of the SEL model both individually and collectively. For more in-depth learning about the SEL model, please read our [first report](#) and check out the [accompanying toolkit](#) for more reflective exercises.

Step 1: Assess Readiness

Step 2: Build and Develop the SEL Leadership Team

Exercise 2.1: Reflections on Leader Role and Agency

Exercise 2.2: SEL Leadership Team Composition Activity

Exercise 2.3: Explore SEL Together

Activity 2.3.1: Personal Journey Reflection

Activity 2.3.2: Values Reflection

Activity 2.3.3: Practices Reflection

Step 1

Assess Readiness

This step will help you consider important areas of readiness that will shape your ability to successfully transition to an SEL approach on your campus. For each category, please reflect on the statement in the left column and reflect on whether your campus is “ready” (R) or “not yet ready” (N). You can add more detail about this aspect of readiness on your campus, along with some potential next steps you might take, in the middle two columns. The boxes in the right column have resources and examples that can help you improve your readiness in each category.

It’s important to note that you don’t need to be “ready” in every category in order to get started on your SEL journey. Please don’t be discouraged even if you select “not yet ready” in most categories! You can still get started, just be aware that these are areas you should pay attention to as you move forward. For example, if you don’t have senior leader support or adequate resources to support your work, how can you prioritize these areas as you move through your planning and implementation process? Or how might you prioritize grassroots leadership strategies if you don’t have senior leader support? This exercise should bring your awareness to strengths and gaps in your readiness and sensitize you to potential actions you should take moving forward.

Readiness Category	Status of Your Readiness in this Category	Reflection on Your Work in this Category	Potential Next Steps	Resources and Examples
Description of Readiness Category	Ready (R) Not Yet Ready (N)	Add more detail on your work in this category. For example in the Senior Leader Champions category: “Our provost and VPSA are strong supporters and are already familiar with the SEL model. They have committed to supporting their teams’ engagement.”	What might you do next if your readiness in this category is not strong? Or how might you leverage strengths in this area?	In this column we share a few examples and resources that can help you improve your readiness in this category.
Pockets of Existing DEI Work We have identified pockets of existing DEI work.				

Readiness Category	Status of Your Readiness in this Category	Reflection on Your Work in this Category	Potential Next Steps	Resources and Examples
Senior Leader Supporters and Facilitators We have identified a few senior leaders who support our work and can help facilitate implementation and broader buy-in.				Examples could include: Leaders with significant power, influence, and impact in academic (e.g., deans), student (e.g., Dean of Students or VPSAs), and operational affairs (e.g., Chief Financial Officer or General Counsel), as well as in key DEI areas such as civil rights and identity centers.
Potential Resources We have identified some potential resources (financial, human, or other) to support our work.				Examples could include: internal/strategic planning funds, student ambassadors, senate sub-committees, etc.
Anchor Vision We have identified a vision to anchor our work to campus priorities.				An anchoring vision might include a DEI plan or equity goals in your campus's strategic plan, a presidential initiative, or a campuswide value-driven ethos such as inclusive excellence.

Readiness Category	Status of Your Readiness in this Category	Reflection on Your Work in this Category	Potential Next Steps	Resources and Examples
Commitment to Learning about SEL We have an interest and commitment to learning about SEL foundations.				For a quick overview of SEL basics, read these briefs as necessary.
Facilitation and Change Leadership Skills We have strong facilitation skills and an understanding of the change process necessary to lead this work.				For a stronger understanding of change leadership, see the Change Leadership Toolkit .
Commitment to Breaking Down Silos We have an interest in and commitment to breaking down silos, including fostering cross-functional relationships, a spirit of collaboration, and productive dialogue.				Consider reflecting on successful collaborations, cross-functional relationships, and difficult yet productive dialogues among team leads. How can you incorporate these lessons into the startup of this work?



Summative Reflections for Step 1

After completing these exercises, what are your reflections about your campus's readiness to implement SEL? Write a summary of your key takeaways from the exercises in Step 1.

Step 2

Build and Develop the SEL Leadership Team

You may come to this toolkit with an SEL leadership team already formed, or you may be an SEL champion looking to build a team from the ground up. In either case, the exercises in this section can help you identify the strengths on your team as well as gaps or areas of growth. When you are thinking about the composition of your team, you will want to consider several different characteristics of each team member. This exercise tends to be most effective when you can have each team member reflect on their own characteristics, but if you don't yet have your team formed you may use the chart below to help you reflect on the types of team members who would be most helpful for your work.

➔ Exercise 2.1: Reflections on Leader Role and Agency

First, consider each leader's role. We should think about roles in two different ways—both functionally and hierarchically. Your functional role is based on your job title, description, or function; for example, academic advising, faculty development, biology faculty, or facilities management would all be examples of a functional role. This describes the type of work you do and the area of campus functioning that you have access to by virtue of your role. Your hierarchical role is based on your position in the organizational hierarchy and whether you have others reporting to you. You could be a senior-level leader like a dean or cabinet-level executive, a mid-level leader like an associate dean or director or chair of a department or program, or a ground-level leader like a faculty member or advisor. It is important to note that you may have multiple roles both functionally and hierarchically! For example, you may be a faculty member (ground-level) and a department chair (mid-level). You can list all your different roles in the chart below so that you and your team can better understand the strengths you bring to the team because of your role. This exercise can help you identify whether you are missing any core roles on your team. For example, are you missing faculty or academic affairs leaders? Is your team entirely composed of mid-level and senior-level leaders? Do the members of your team have access or proximity to decision-making spaces?

As you build out your team, you want to ensure that you have members from a variety of different functional roles as well as hierarchical roles. Here are some suggestions for key functional and hierarchical roles you might want to include on your team:

- Institutional Research (IR)
- Finance/budget
- Member of cabinet or senior leadership
- Academic affairs
- Student affairs
- Facilities
- Legal or general counsel
- Faculty (*ideally more than one from different disciplines*)
- Advising
- Community outreach/external affairs
- Human resources

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Second, reflect on your agency as a leader. Leader agency relates to who you are and what you bring to the project—your identity, passion, or experiences—that empower you to act. This category is more personal and less based on your professional role, though you may have aspects of your professional identity that are relevant here too. For example, your identity as a female scientist may have sparked a passion for you to engage with initiatives related to women in STEM. Or your experiences as a first-generation college student may have shaped your desires to advocate for first-gen students on your campus. For this category, you should think about how you got engaged with equity work and why you care about it.

Third, think about what knowledge and skills you have that can benefit the team. Do you have a strong understanding or certain skills to navigate institutional processes, policies, or norms that may impact your team’s goals? For example, maybe you have a deep understanding of financial aid eligibility or awards processes, or perhaps you have been on the faculty senate for many years and understand its formal and informal dynamics very well. Maybe you are a student affairs leader who is skilled at collaborating with faculty, or perhaps you are a faculty member who has written and been awarded many grants. All of these skills and this knowledge can help your team accomplish its goals.

Finally, consider your leadership team competencies and characteristics, or the ways that you can contribute most effectively to the work of a team. Adapted from Bensimon & Neumann’s (1993) study of college leadership teams and more recently used in the Center for Urban Education’s (2020) Guide for Composing Racial Equity Teams, these competencies are all important for effective team functioning. Consider which competencies and characteristics align with your strengths as a leadership team member:

CRITICAL THINKERS: Inquiry-oriented but stay focused on the task, are analytical, and expand the team’s “intelligence” by redefining and reinterpreting the problem or issue.

COLLABORATIVE LEARNERS: Open to new ideas and constructive feedback, do not see participation as a burden.

ANALYSTS: Skilled at defining the problem, interpreting and seeing patterns in data, viewing data from diverse angles, and helping the team move from the simple to the complex.

INTERPRETERS: Do not jump to conclusions, explain how an issue or topic could be viewed by those outside the team, and routinely ask, “How do we know that ... ?”

EMOTIONAL MONITORS: Establish, maintain, and balance the human, personal, and emotional aspects of team dynamics, and will facilitate others, introduce humanity, and ease tensions.

STUDENT ADVOCATES: Ask, “What can the institution do better to serve racially-minoritized students?” and acknowledge that racial inequities in outcomes are created and/or exacerbated by inadequate knowledge, a lack of cultural know-how, and/or the absence of practitioner and institutional support.

FRIENDLY SKEPTICS: Raise questions and critiques that will ultimately strengthen the team’s findings.

EQUITY MONITORS: Keep the team focused on racial equity and continuously raise questions about who is being impacted by race and ethnicity. Equity monitors are aware of their racial identity and recognize that white is a racial identity; reflect on racialized consequences of taken-for-granted practices; and model how to view practices, structures, and policies through a critical racial lens.¹

¹ Center for Urban Education (2020), pp 9-10

➡ **Exercise 2.2: SEL Leadership Team Composition Activity**

Now that you have considered each of these areas that are important for team composition, work with your team to fill out the chart below and answer the reflection questions that follow. Please note that it is very likely that your team composition will change, probably more than once! Leaders will leave the institution, new leaders will join, and as your work unfolds you may find that certain team members no longer fit with the team’s vision or that new members are needed. You can revisit this section periodically to reevaluate whether you still have the right team in place.

Who is on the team? (Name)	Leader Role (functional and positional)	Leader Agency (identity, experiences, and passions)	Knowledge and Skills	Leadership Team Competencies (critical thinker, collaborative learner, analyst, interpreter, emotional monitor, student advocate, friendly skeptic, equity monitor)

1. Who is on our team now? What roles, agency, knowledge, skills, characteristics, and competencies do we bring to the project?

2. Are there any key gaps on the team—in any area?

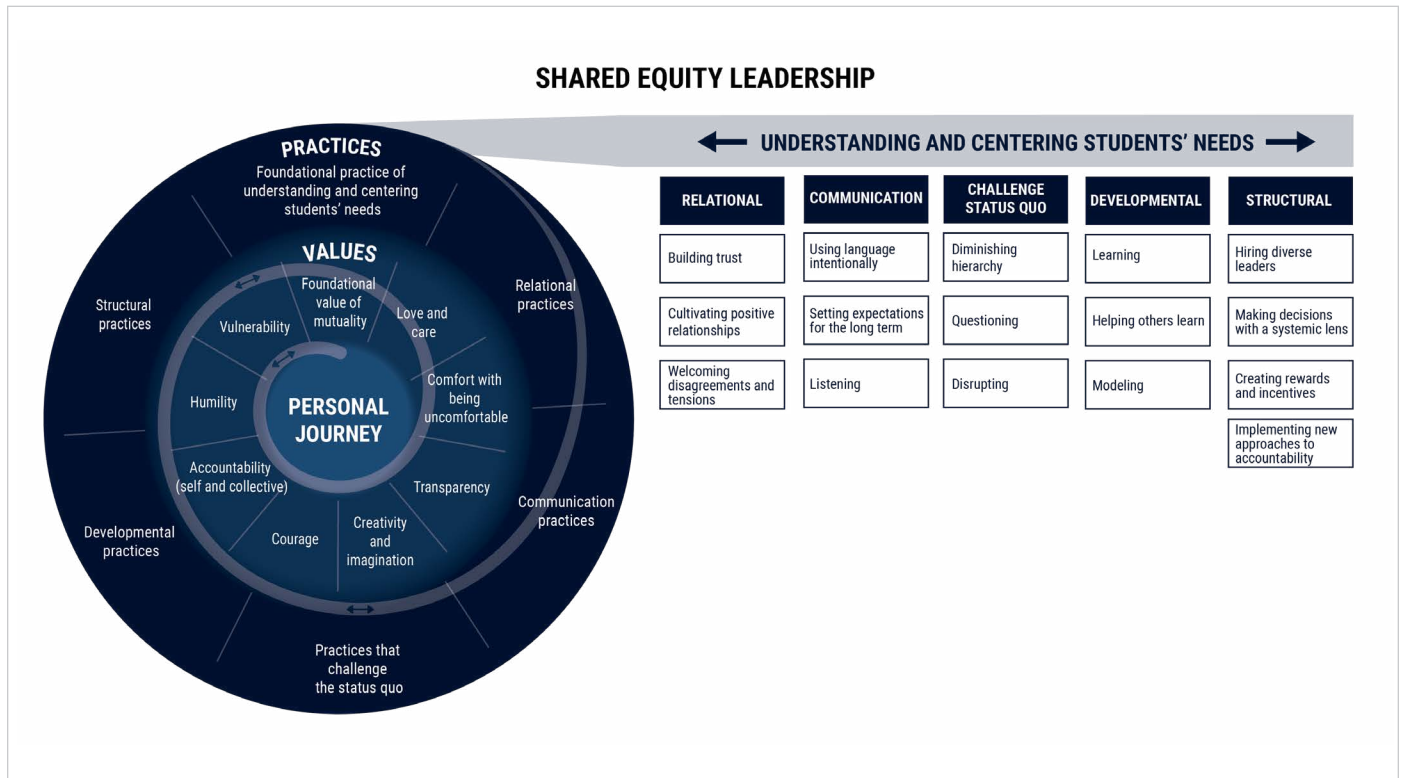
3. Who and what will we channel as inspiration for this work? How can we commit to building and maintaining the community necessary to initiate and sustain this work?

4. How might different levels of power or hierarchy among team members shape our team dynamics?
How can we attend to these issues as we move forward?

5. How can we leverage our team to expand our equity networks on campus?

➔ Exercise 2.3: Explore SEL Together

Now that you have built your SEL leadership team, let’s reflect on the SEL Model together—the personal journey toward critical consciousness, values, and practices. In this activity, you and your team will reflect on each element of the model as you begin to think about how you’ll work collectively to enact your equity goals.



Activity 2.3.1: Personal Journey Reflection

Answer the following questions as a group, reflecting on how your personal journey has shaped you as individuals and as a group.

1. How does your campus position shape or influence your approach to equity leadership?

2. Where are you on your personal journey and how do you need to continue to develop?

3. How do you think aspects of your identity or position (either privileged or marginalized) affect other leaders you might work with in a shared equity leadership effort?

4. How do you hope to further grow on your journey as an equity leader?

Activity 2.3.2: Values Reflection

Reflect on the **SEL values** and answer the key values discussion questions below. After each team member has reflected on their strengths, fill out the Team Values Inventory by filling in each team member's name and checking the values in which they feel the strongest. This inventory will help you identify the areas of strength on your team, as well as any gaps you may need to be intentional about filling. Once you have completed the Team Values Inventory, work as a group to discuss the reflection questions that follow.

➤ Key Values Discussion Questions

What are one or two values that you feel are particular strengths of yours?

How might you leverage your strengths in a team-based or shared leadership setting?

Team Values Inventory									
Team Member	Mutuality	Love and Care	Comfort with Being Uncomfortable	Transparency	Humility	Courage	Accountability (self and collective)	Creativity and Imagination	Vulnerability

> Values Group Reflection Questions

1. Are any values strongly represented on your team map? If yes, how have you seen this value manifest in your day-to-day work, given that so many team members have strength in this area? Consider this question for each strongly represented value.

2. Are there any values that only one or two members of the group selected? How might you capitalize on their strengths in these areas to bring these values to the forefront of your team's work?

3. Are there any values that no one selected as their area of strength? How might you cultivate these values with your team without existing reservoirs of direct expertise or strength?

4. Are there any conditions or systems on your campus that might be inhibiting the expression of particular values?

Activity 2.3.3: Practices Reflection

Reflect on the SEL practices and answer the key discussion question. After each team member has reflected on their strengths, fill out the Team Practices Inventory Chart on the next page by adding each team member's name and checking the boxes associated with their strengths. This inventory will help you map areas of strength in terms of SEL practices on your campus, as well as identify any potential gaps. Once you have completed the Team Practices Inventory, work as a group to discuss the reflection questions that follow.

➤ Key Practices Discussion Question

Which practices are areas of strength for you? How might you leverage your strengths in a team-based or shared leadership setting?

Team Practices Inventory																	
Team Member	Foundational Practice	Relational Practices			Communication Practices			Developmental Practices			Practices that Challenge the Status Quo			Structural Practices			
	Understanding and Centering Students' Needs	Building Trust	Cultivating Positive Relationships	Welcoming Disagreements and Tensions	Using Language Intentionally	Setting Expectations	Listening	Learning	Helping Others Learn	Modeling	Diminishing Hierarchy	Questioning	Disrupting	Hiring Diverse Leaders	Making Decisions with Systemic Lens	Creating Rewards and Incentives	Implementing New Approaches to Accountability

> Practices Group Reflection Questions

1. Are there one or a few practices that are very strongly represented on your team map? How have you seen this practice manifest in your day-to-day work given that so many team members have strength in this area?

2. Are there any practices that were selected by only one or two members of the group? If so, how might you capitalize on their strengths in these areas to build this practice into your team's work?

3. Are there any practices that no one selected as their area of strength? If so, how might you cultivate these practices on your team without existing reservoirs of direct expertise or strength?

4. What structures or systems on your campus may be inhibiting the enactment of certain practices, either implicitly or explicitly?



Summative Reflections for Step 2

After completing these exercises, do you feel confident about your team composition and understand one another's strengths? Do you have a clear understanding of the SEL model? Write a summary of your key takeaways from the exercises in Step 2 and what your next steps will be.

Landscape Analysis

In this phase, teams can expect to establish a more careful and critical understanding of current capacities and networks, as well as context and goals to help facilitate the integration and implementation of SEL. In Step 3, you will evaluate current campus equity definitions and goals, assess your current context, and reflect on different types of capacity and capacity-building opportunities on campus. Step 4 asks you to map your equity networks—both the personal networks of each team member, as well as the existing pockets of equity work across campus. Ultimately, these exercises will help you construct a campus equity “network map,” which will highlight areas of strength as well as areas where there are gaps in equity work on campus. This landscape analysis is really foundational for understanding the current state of equity work on your campus. Having this understanding will help you make better decisions about how to move your work forward.

Step 3: Evaluate Goals and Context

Exercise 3.1: Identify Existing Campus Equity Goals and Definitions

Exercise 3.2: Understanding Context and Considering Levers for Change

Exercise 3.3: Considering Current Capacity

Step 4: Map Campus Networks

Exercise 4.1: Mapping Your Personal Network

Exercise 4.2: Reflecting on Personal Networks and Key Influencers

Exercise 4.3: Mapping the Institutional Equity Network

Step 3

Evaluate Goals and Context

As a reminder, SEL is a leadership approach where responsibility for equity work is shared across the organization rather than siloed in one role or office. Clarity around your campus's existing equity goals is critically important so that you can determine the most effective ways to share the work. You may know generally that you want to promote equity on your campus, but what specifically do you hope to accomplish? Are there persistent gaps in retention and completion among racial/ethnic groups on your campus you are hoping to close? Do you want to recruit more faculty and staff from diverse backgrounds so that your campus workforce better reflects your student population? Are there climate issues on campus? Does the campus struggle with inclusion/belonging for students from low-income backgrounds or working/part-time students? Your approach may look different if you are hoping to improve campus climate than it would if your goals are to ensure equitable access to study abroad or other high-impact practices, or to promote diverse faculty hiring.

Additionally, your organizational context matters because different institutional environments provide unique opportunities and challenges that can shape the success of your efforts. Your approach will likely be different if you are in a large and highly-decentralized campus versus a small, close-knit campus. Similarly, if your campus culture supports innovation and experimentation, you may have an easier time recruiting allies for your work than if your culture is very status quo-oriented. Understanding your context well can help you determine a way forward that will fit your unique campus environment.

➔ Exercise 3.1: Identify Existing Campus Equity Goals and Definitions

First you will identify and reflect on existing equity goals and outcomes that your campus may have. For example, you may already have a DEI plan or equity and inclusion goals that are a part of your campus's strategic plan. It is important to be aware of those goals and any measurable outcomes that are associated with them. You can anchor your SEL work into your existing DEI plan or your existing equity and inclusion goals to gain support for your work. You might also consider looking at school-level, college-level, or department-level plans and goals as well as institution-level plans and goals. The following questions will help you identify existing equity goals and understand how SEL can help you accomplish them.

1. Do you have a shared definition of equity on your campus? Or do you use a different term to describe the work, given your campus history or evolving political constraints (e.g. inclusive excellence, belonging, etc.)? If your campus does not have a common, well-understood definition, consider how your SEL team might be positioned to facilitate its development.

2. Does your campus have existing equity goals? If so, what are they? If not, what campus goals or priorities are connected to equity or student success? Where are these goals located (e.g. strategic plan, equity plan, campus mission/vision statement)?

3. Do you know how your campus is doing in terms of meeting current equity goals? What data or evidence do you have that demonstrates progress (or lack thereof)? How is the campus community kept informed about progress toward these goals?

4. Do you feel these are the right equity goals for your campus? What may be missing from these goals?

5. How do you think SEL could help you meet your campus's existing equity goals?

➔ Exercise 3.2: Understanding Context and Considering Levers for Change²

A deep understanding of the organizational context is pivotal for getting SEL off the ground and embedded across the organization. Organizational context includes aspects of your organization such as institution type, leadership and governance, campus culture, and resource environment (among others) that influence and either enhance or constrain your ability to implement SEL. For example, your approach to building relationships on campus will likely be very different if your campus is a small liberal arts college compared to a large multicampus community college or a major research university. Similarly, your equity goals will look different if your campus is a PWI (predominantly white institution) as opposed to an HSI (Hispanic-Serving Institution) or an HBCU (Historically Black College and University). Your existing organizational structures for equity work will also influence the decisions you make about how to move the work forward. For more information on potential ways to structure the work, please see our report [Organizing and Structuring the Work](#). Understanding your context will help you make the most effective decisions for your unique campus environment.

Similarly, understanding and identifying potential levers can help you accelerate your SEL work. Levers are opportunities that can be “pulled upon” or manipulated to accelerate change. Levers are typically, though not exclusively, identified through an analysis of your context. Think of them as “actionable opportunities.” For example, you may have access to grant funds that you could leverage to meet your SEL goals. Or your campus may be embarking on a new strategic planning process that you could leverage to enshrine some of your key SEL priorities. You can use these potential levers to anchor and amplify your work.

In this exercise, reflect on **all** context categories and how your context might shape your approach to SEL. Then, select **at least one** lever (but **no more than three**) that you might use to amplify your SEL efforts.

Use the chart below to record reflections on context and levers in relevant categories with a short description.

“A deep understanding of the organizational context and potential levers is pivotal for getting SEL off the ground and embedded across the organization.”

² This section is adapted from the [Change Leadership Toolkit 2.0](#)

Considering Context and Levers

Context Category (please consider all)	How might this area of context shape our approach to SEL?	Lever Categories (please select between 1-3 potential levers from this column)	How could this lever support our SEL approach? How will it accelerate our progress?
Institutional Type		Institution size, sector, control, Carnegie classification, MSI designation	
Leadership and Governance		Campus (system, state) strategic plan(s), including master plan, diversity plan, and other plans	
		Governance and power structures—internal and/or external	
		Policies and practices—internal and/or external	
		Organizational structures for equity work	
Culture		Campus (or system) culture, norms, and networks, mission	
Human Capacity and Capital		Rewards and incentive systems	
Physical, Financial, and Technical Resources		Funding streams and costs	
		Feedback systems (e.g. assessment, data analytics)	
External Partners and Intermediaries		Affiliations or partnerships with national associations & organizations, including regional, community, state, national or international	
Other			

➔ Exercise 3.3: Considering Current Capacity

A key part of your context is the capacity that already exists on your campus. You likely have existing capacity for equity work as well as for shared or collaborative leadership. For example, you may have professional development sessions around incorporating inclusive pedagogies, or your performance evaluation process may include specific items around working collaboratively. When implementing SEL, it is important to ensure you have adequate capacity for both the “shared” and the “equity” pieces of SEL. Similarly, SEL requires capacity to be built at several different levels—the personal or individual level, the collective or group level, and the organizational level. For more information on these aspects of capacity building, you can read our report [Capacity Building for Shared Equity Leadership: Approaches and Considerations for the Work](#).

This exercise will help you identify existing capacity building strategies on your campus at the personal, collective, and organizational levels, as well as determine whether they build capacity for equity, shared leadership, or both. Fill out the chart below with your team and then discuss the reflection questions that follow.

Level	Strategies	Examples on Campus (be sure to name the program, division/unit, and/or participants)	Purpose (equity, shared leadership, or both)
Personal	Professional development, training, and workshops		
	Coaching, mentoring, and peer feedback		
	Storytelling (personal and collective)		

Level	Strategies	Examples on Campus (be sure to name the program, division/unit, and/or participants)	Purpose (equity, shared leadership, or both)
Collective	Professional Learning Communities or Communities of Practice		
	Affinity groups		
	Healing circles		
Organizational	Committees, councils, or other cross-functional groups that support equity work		
	Hiring, onboarding, and promoting diverse leaders		
	Incentivizing and supporting the work		

1. Where is our capacity building currently the strongest? Look at both level (personal, collective, organizational) and purpose (DEI, shared leadership).

2. Where are there gaps in our existing capacity-building opportunities?

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Summative Reflections for Step 3



After completing these exercises, do you feel like you have a clear understanding of your campus's existing equity goals and context? Were you able to identify key levers you might use to advance your work? Write a summary of your key takeaways from the exercises in Step 3 and what your next steps will be.

Step 4

Map Campus Networks

This step will help you understand existing equity networks on your campus—both your “personal” network of people you work with on a regular basis when it comes to equity work, as well as the larger organizational network of leaders involved in equity work. The activities in this step will help you identify and connect the pockets of equity work that are happening across your organization, which helps to build SEL and drive your equity goals.

➔ Exercise 4.1: Mapping Your Personal Network

For this exercise, you will begin to identify your personal equity network on campus. In the chart below, list the names of the individuals on campus that you work most closely with on equity-related issues. For each person you list, be sure to include their role; their department or division; what you work on together (e.g. co-facilitating an affinity group, planning an event for LGBTQ+ students, working on a cluster hire initiative, serving on a DEI committee together, etc.); and whether you can fit that work within one of the SEL Practices categories (relational, communication, challenge

status quo, developmental, structural). If you cannot decide how your work together fits in one of the Practices category, you can write “other.” You can include as many people as you would like, but we ask that you try to include at least three, if possible. They can be members of your SEL team or outside of the team. Try to think about who you work with most frequently and/or who you feel you work with most impactfully. After you fill out the chart, be sure to complete the reflection questions that follow.

Name	Role	Department/ Division	What equity work do you do together?	Does the work that you do together fall into one of the SEL practice categories? (relational, communication, challenge status quo, developmental, structural)
Elizabeth (example)	HR Associate	Human Resources	Work on diversity cluster hire initiative	Structural

1. Are the people in my personal network concentrated in one department or division or are they spread across campus?

2. Can I identify one or two people in my personal network who are key “influencers” on campus—people who either have the potential to help our team accomplish our goals or who have strong connections all across campus that we might leverage to expand our support?

➡ Exercise 4.2: Reflecting on Personal Networks and Key Influencers

Next you will take some time and share some information about your personal equity network with your fellow team members. Each team member will share one to two “key influencers” from their network—leaders who are either strongly connected to many others across campus (have a strong network themselves) and/or leaders who are doing especially effective or meaningful work.

[illegible]

➔ Exercise 4.3: Mapping the Institutional Equity Network

Now you will start creating your campus SEL network map. Make sure to include the “key influencers” from everyone’s personal network, as well as any other areas you know the work is happening that may not have been mentioned by any members of your team. You might start listing all the work in the table format we provide here and then create a more visual “map” format later on, OR you can use a more visual tool like Padlet or even sketch your map out by hand if you prefer. Begin to take note of any key campus units or divisions that are NOT represented on the map. Be sure to discuss the reflective questions that follow the organizational network chart.

Department/Division	Individual Name	Type of DEI Work (e.g. cultural events, trainings, hiring initiatives, research, etc.)

1. What are your initial thoughts or insights about your campus’s current network?

A. Are there concentrations in any particular area? For example, is the network concentrated in student affairs?
Are staff/administrators the primary stakeholders involved?

- B. What are the areas of potential overlap that could be connected or coordinated? For example, are there DEI professional development activities happening in multiple offices and schools, as well as through HR? Are there different DEI hiring initiatives in multiple schools or colleges?

2. What are the pockets of especially strong work (or structural practices) that could be highlighted and used to support other areas on campus? For example, promotion and tenure standards that incorporate DEI in a particularly thoughtful way within a single school or college? A thorough DEI strategic plan or accountability metrics within one division?

3. Are there any areas where your team just doesn't know whether DEI work is happening? Who might you connect with in these areas to learn more? How might you go about making some of those connections?

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Summative Reflections for Step 4



After completing these exercises, do you feel like you have a clear understanding of your campus's equity networks? Is there key information you are still missing that you need to complete your network mapping? Write a summary of your key takeaways from the exercises in Step 4 and what your next steps will be.

Chart the Course and Plan for Growth

Now that you have an understanding of the current landscape for equity work on campus, you should hopefully feel more equipped and empowered to move forward. In this phase, you and your team will build a shared understanding of how you want to proceed with SEL on your campus. In Step 5, you will clarify your vision for the work, converge around shared language and goals that are anchored in institutional goals and priorities, and brainstorm some strategies for communicating your vision and goals. Step 6 will help you think through how to expand your networks and how to communicate with and build capacity for different groups on your campus.

Step 5: Create Shared Vision, Language, and Goals

Exercise 5.1: Creating Shared Vision and Common Language

Exercise 5.2: Clarifying Goals and Outcomes

Exercise 5.3: Anchoring SEL Vision and Goals to Institutional Priorities

Exercise 5.4: Communicating Our Goals and Vision

Step 6: Expand Networks and Build Capacity

Exercise 6.1: Identify Gaps and Expand the Network

Exercise 6.2: Understanding Different Priorities and Motivations

Exercise 6.3: Developing Key Messaging for Different Stakeholder Groups

Exercise 6.4: Building Capacity

Step 5

Create Shared Vision, Language, and Goals

In Step 3 you identified current equity goals on your campus and analyzed your organizational context to determine opportunities, barriers, and capacity for meeting those goals. In step 4 you mapped the equity work already happening on your campus. Now that you have analyzed your campus landscape, in this step you will start to build a shared vision for how the work will get done that you can easily communicate to campus stakeholders as you start to expand your network. You will also converge on some specific goals and outcomes that you would like to accomplish using an SEL approach.

A shared vision provides a useful framework for a team to establish a coherent and unified set of conceptualizations, goals, and values for a given project or scope of work. It shapes hopes and expectations for a project and helps foster a culture that values the full and effective participation of all members. Having a shared vision to guide SEL work can serve as a North Star to steer all efforts.

Goals are more specific statements about what you would like to accomplish using an SEL approach, whereas outcomes are the measurable results of the goals you set. If you were able to identify existing campus equity goals in Step 3, your SEL goals should align with and be in service of these campus equity goals. If you noted gaps or omissions in your campus's current equity goals, here is where you can meaningfully articulate and translate them into goals. As you think about goals for your SEL work, you should consider both shorter and longer term goals—what might you hope to accomplish this year? In the next two to five years? In the next 10 years? This work takes time and it is important to think about how the actions you take now can pave the way for future change.

Furthermore, as you move through these exercises, we encourage you to consider how, if at all, restrictive political environments (e.g., anti-DEI legislation and sentiment) might affect your shared vision, language, and goals. To the extent that it might, include these considerations in your responses. You can also see our practice brief on [SEL in restrictive environments](#) for more information on this topic.

➔ Exercise 5.1: Creating Shared Vision and Common Language

1. What is your vision for how SEL will change your campus? How will it look, feel, and operate after you enact an SEL approach? What will be different? What will remain the same? Have each team member answer these questions individually before discussing them as a group.



Tip: It might be helpful to think about this question expansively, considering how the campus might be different, how people will be changed, and how key drivers of change (e.g., collaboration) will be transformed.

2. After your team's discussion, can you condense these ideas into a 2-3 sentence statement that you could easily communicate to stakeholders across campus?

➔ Exercise 5.2: Clarifying Goals and Outcomes

1. How does adopting an SEL approach enhance, support, or build on the campus equity goals you identified in Step 3? If you were not able to identify campus equity goals in Step 3, what goals are you hoping to accomplish using an SEL approach?

2. What are some specific outcomes you are hoping to see as a result of your Shared Equity Leadership efforts?
(Outcomes tend to be narrower and measurable compared to goals, but you can still think creatively about what these might be. For example, your outcome might include new organizational structures that support SEL, equity-specific responsibilities embedded in XX number of job descriptions, or changes to particular policies or processes on campus to make them more equity-focused).

3. Can you identify a particular focus or multiple foci for your goals/outcomes? [Note: A focus on **structures** involves changing how aspects of the campus are organized, including elements such as leadership organizational charts or policies. A focus on **process** involves how things happen on campus, such as how faculty and staff work together across units, the interview process for faculty, or other operations-related changes. A focus on **attitudes/values** relates to how people feel about their work in relation to structures and processes—in other words, the organizational culture (Kezar, 2018)].

Structures

Process

Attitudes/Values

➔ Exercise 5.3: Anchoring SEL Vision and Goals to Institutional Priorities

You may have already reflected on how your SEL vision and goals might align with your campus and senior leader priorities when you worked through your landscape analysis. If so, you may not need to complete this exercise. If you did not explicitly consider these connections, this exercise can help you understand how you can ensure that your SEL goals and vision are aligned with the priorities of your senior leaders and your campus, which are key steps in securing buy-in for your work. This activity will work best as a team discussion. You may consider using a polling software or Zoom poll to ensure everyone on the team can give their input. You can use the questions below as a jumping-off point for your discussion.

1. What are our campus's or system's strategic priorities right now? (you can look to your institution or system's strategic plan for guidance). Where does equity show up in those priorities?

2. What do we know about our president/chancellor's priorities? (based on public statements, documents, discussions in meetings, actions, budget allocations, etc.) Do these differ from the priorities outlined in our strategic plan? What do we know about his/her commitment to equity?

3. How do the goals and vision we have outlined for our SEL work connect to our campus priorities?
To our president/chancellor's priorities?

4. Where are there gaps between our goals and vision and our campus/senior leader's priorities? How might we more tightly make connections between our SEL work and the priorities outlined in our campus's strategic plan?

5. How can we bring in existing organizational language (e.g. mission or vision statements, strategic priorities, or other language that is already part of campus culture) to describe our SEL work?

➔ Exercise 5.4: Communicating Our Goals and Vision

Now let's think about strategies for communicating your work more broadly. This exercise features several prompts to help you brainstorm different communication strategies.

1. Develop a paragraph or set of bullet points that captures your main SEL goals.

2. What communications avenues are available to distribute information about SEL? For example specific meetings, newsletters, web pages, listservs, etc.? What do people pay attention to most? How might this vary by stakeholder, audience, and the realities of the political environment in which your campus is set?

3. What other out-of-the-box ideas can you come up with to help you communicate your work? For example, signs that are put up across campus, pins, T-shirts, etc.

If time permits or group interest is present, begin designing a set of slides that capture your main goals and objectives, a 90-second elevator pitch for why a colleague should join the SEL effort, and/or some type of visual that would be helpful to capture the work you are planning.

Summative Reflections for Step 5



After completing these exercises, do you feel like you have a clear sense of your team's vision and goals for SEL? Do you feel aligned on these goals and on common language you will use to communicate your vision and goals? Write a summary of your key takeaways from the exercises in Step 5 and what your next steps will be.

Step 6

Expand Networks and Build Capacity

What other campus leaders or offices do you need to engage in order to accomplish your goals? Who is missing from your network now, and what might motivate them to engage with your team? What sort of capacity do you need to build among your team and across the organization? In this step, you will begin thinking about how to expand your network and build capacity. You will also think about how you can specifically build capacity for communication with different stakeholder groups in order to get their buy-in and engagement with SEL work.

➡ Exercise 6.1: Identify Gaps and Expand the Network

Using the network maps you built in Step 4, begin to note gaps in your current equity network in the left column below. You may include key offices or departments you need to engage to accomplish your equity goals. For example, you may need racially disaggregated data on student outcomes and need to pull in your Institutional Research office. Or you may include certain types of work that you notice are missing. For example, you may have lots of DEI events but very few activities aimed at promoting equity in hiring or

promotion. In the middle column, jot down some strategies (or values and practices) you might draw on to help you fill these gaps. For example, if you want to engage faculty in a particular department, you may need to think about what would motivate these faculty to get engaged. In the right column, note whether there are any people in your network currently who could help you make connections in this area or close this gap. You can include as many gaps as you would like—no minimum or maximum!

[illegible]

➡ Exercise 6.2: Understanding Different Priorities and Motivations

Understanding the priorities and motivations of various groups that you want to incorporate into the SEL network can help you better determine how best to engage with these groups. In the left column of the chart below, please insert the name of the stakeholder group you have identified as a gap in your network (e.g. IR office or HR). We have included some other key stakeholder groups that you may want to consider as you think about expanding your network. Then consider what may motivate this group to participate in SEL efforts (2nd column), as well as the main priorities or pressures that this group likely faces in their day-to-day work (3rd column).

[illegible]

➔ Exercise 6.3: Developing Key Messaging for Different Stakeholder Groups

You have already considered the priorities and motivations of different stakeholder groups. Now you can start thinking more concretely about what sorts of messages will resonate best with different groups and how these messages can be communicated most effectively. We have included example “key messages” for several stakeholder groups, but feel free to adjust or change these as needed for your campus context, and feel free to add additional stakeholder groups as well!

Key Messages (Tailored by Group)			
Group	Key Message (these are just examples, you can change these if you don't think they fit for the stakeholders on your campus!)	Format or Modality of Message (email, in-person meeting, large PD session, etc.)	Motivation Behind Message (connecting back to each group's motivation can help you determine whether the message will resonate and what sort of details to add)
Executive Leadership			
Deans/Chairs			
Faculty			
Staff			
Students			
Other Stakeholder Group?			

Key Messages (Tailored by Group)

Group	Key Message (these are just examples, you can change these if you don't think they fit for the stakeholders on your campus!)	Format or Modality of Message (email, in-person meeting, large PD session, etc.)	Motivation Behind Message (connecting back to each group's motivation can help you determine whether the message will resonate and what sort of details to add)

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Identify Unlikely Allies and Engage with Skeptics

As you are working on expanding your network, it is also important to consider two other groups that could have an outsize impact on the success of your SEL efforts. First, can you identify any individuals or groups who are likely to be skeptical of or resistant to your efforts? Skeptics, especially those in influential or powerful positions, have the potential to derail your efforts if you don't anticipate their arguments and consider how best to engage with them. The best-case scenario with skeptics is to bring one onto your team (see Step 2 exercises on Building the Team and engaging "friendly skeptics") or engage them tangentially in a small portion of your work so that they can start to understand its value. These skeptics can become unlikely allies who could be incredibly valuable at expanding support for your efforts. Ignoring potential resistance or skepticism won't make it go away, so it is best to consider this now!

➔ Exercise 6.4: Building Capacity

Now that you have identified ways to expand your network, let's circle back to the idea of capacity building. In Step 3 you assessed current capacity building opportunities on your campus. You considered existing opportunities at the personal, collective, and organizational levels and determined whether they supported building capacity for shared leadership, DEI, or both. Now you can begin to plan for how to strengthen capacity in areas where it is currently lacking, with the added lens of how you might need to build capacity for the various groups you would like to include in the network. Take a look back at Step 3 and remind yourselves of the gaps in capacity building you identified in terms of personal, collective, and organizational capacity, as well as capacity building for shared leadership and DEI. Place those in the left column in the appropriate row. In the middle column, note whether there is a particular group or groups that specifically need to build this type of capacity. In the right column, brainstorm some ideas for how you might build this type of capacity.

	Gaps We Have Identified	Group/s that Need to Develop this Capacity	Ideas for Building Capacity
Personal capacity building (individual opportunities to build knowledge, skills, and capabilities to do DEI work and share leadership)			
Collective capacity building (building relationships and community by learning with and from one another in a group setting)			
Organizational capacity building (creating new systems, structures, and processes to support SEL work)			

	Gaps We Have Identified	Group/s that Need to Develop this Capacity	Ideas for Building Capacity
Shared leadership capacity building (learning how to work and lead collaboratively—when and how to step forward and step back, how to structure shared leadership arrangements, and how to monitor the effectiveness of these structures)			
DEI capacity building (cultivating the knowledge, skills, and critical consciousness necessary to fully understand DEI issues and to make progress toward DEI-related goals)			
Considering emotional labor³ (equitable distribution of work, ensuring capacity building opportunities are scaffolded to meet needs of people at different points on their personal journey)			

³ Please read [our report](#) for more detail on emotional labor in SEL environments.



Summative Reflections for Step 6

After completing these exercises, do you feel like you have a clear sense of how you want to expand your network and build capacity? Do you feel clearer on how to communicate about your work to different stakeholder groups? Write a summary of your key takeaways from the exercises in Step 6 and what your next steps will be.

Activate Change

In Phase 4, you and your team will reflect and plan to activate change in various campus corners. Step 7 asks you to think about how to embed SEL into roles, policies, and practices, and features several case studies that will help you see what this embedding can look like in practice. In Step 8, you will consider ways that you can monitor your progress and grapple with notions of accountability.

Step 7: Embed SEL into Roles, Policies, and Practices

Exercise 7.1: Embedding Equity Work into Roles and Functions

Exercise 7.2: Case Study Reflections

Step 8: Monitor Progress and Measure Success

Exercise 8.1: Reflecting on How You Will Measure Success

Exercise 8.2: Determining Evidence of Success and Responsibility
for Meeting Goals

Step 7

Embed SEL into Roles, Policies, and Practices

A key part of activating change is thinking about how to embed SEL into roles, policies, and practices. At this stage of the process, you should be focusing not only on how individuals are making changes to their roles but also how you are making changes at a collective level (group or committee work) as well as at the organizational level (policies and practices, structures). In this step, you will reflect on how you embed equity into functional roles, as well as in collective work and at the organizational level.

Additionally, we provide fictional vignettes inspired by real situations we have observed on campuses engaged in SEL. These vignettes are intended to spur you to think about how you can incorporate SEL into policies and practices, as well as navigate both expected and unexpected transitions and changes. Our hope is that these scenarios will help you consider how to respond to shifts in context and goals and embed SEL throughout the life cycle of any role.

➔ Exercise 7.1: Embedding Equity Work into Roles and Functions

In this exercise, you will think about what it might look like to embed equity within various organizational structures and roles on your campus. This embedding work may look different depending on your unique campus context and your equity goals. A campus that is already quite diverse but has significant equity gaps in retention and graduation rates might make very different decisions about how to embed the work compared to a campus that is struggling to diversify its student and faculty populations, for example. In either case, it will be helpful to think about what it would look like to embed equity in structures and roles.

You can think about embedding in three different ways: (1) embedding equity throughout the lifecycle of a role, like in hiring, onboarding/training, socialization, annual reviews, etc.; (2) embedding equity into functions that transcend roles, such as budgeting, planning, decision-making, or policy-making; and (3) embedding equity into specific roles or functions that are role-specific such as faculty (teaching, research), student affairs staff (advising, student development), or facilities (space planning, accessibility).⁴

Use the chart below as a starting point to consider how equity is currently embedded in different roles and functions, as well as how you might embed it more deeply.

		How is equity embedded currently?	How might we embed equity more deeply?	What capacity building activities might be required to embed effectively? Record whether these activities exist or should be created.
Role Lifecycle	Recruitment			
	Hiring			
	Onboarding			
	Annual review			
Functions that Transcend Roles	Budgeting			
	Planning			
	Decision-making			
	Policy-making			

⁴ For more information on roles and what SEL can look like in different roles, you can read our report [Leading for Equity from Where You Are](#).

		How is equity embedded currently?	How might we embed equity more deeply?	What capacity building activities might be required to embed effectively? Record whether these activities exist or should be created.
Roles & Role-Specific Functions	Faculty and faculty development/teaching/Centers for Teaching and Learning			
	Admissions and recruitment			
	Staff/advising			
	Staff/financial aid counseling			
	Human Resources/staff			
	Development			
	Facilities/accessibility			

➡ Exercise 7.2: Case Study Reflections

For this activity, please read the vignettes and respond to the reflective questions that follow. We recommend that each team member answer the questions individually first. Afterward, convene as a team to discuss your individual responses and determine the best path forward.

VIGNETTE 1: Valley View University has identified disproportionate equity gaps for students of color in gateway courses such as English and math, while the faculty in those departments are disproportionately white. While the campus has made several efforts over the years to address these gaps, they now have an opportunity to hire several new faculty members in these departments and want the hiring process to reflect an SEL approach. Louis is an associate vice president for academic affairs and has been asked to oversee the process. He asks Maurice and Paula, chairs of the English and math departments, as well as the director of student success, Jane, to collaborate with him.

Maurice and Paula each have the opportunity to hire either two full-time tenure-track professors or one full-time tenure-track professor and three part-time adjunct instructors in their respective departments. The new hires will be responsible for working with peer tutors from the Supplemental Instruction (SI) program, which is run out of Jane's office (student success), with a dotted line to Louis's portfolio in the provost's office. The group would like to cultivate a diverse pool of candidates that reflects the diverse backgrounds and life experiences of students in each department. As the group begins their work, they realize that the faculty handbook has not been updated in over 10 years and that faculty search guidelines are similarly outdated. There is not a standardized process for hiring faculty at all.

- ➡ 1. Where should the group begin? How could they bring SEL values and practices into their work on this hiring initiative?

- ➡ 2. What sorts of questions should Maurice and Paula be asking themselves about how to approach this search process? What questions might they ask to better understand why students are struggling in entry-level courses? How might they make decisions about which positions to hire for (FT/PT, tenure-track or VITAL/contingent), and how might they ensure that these different faculty needs are met as they are hired and onboarded?

- ➡ 3. What sorts of changes should the group consider making to the faculty handbook? How can they ensure that equity principles are embedded in hiring policies? What would an equity-minded adjunct hiring process look like?

VIGNETTE 2: Saint Robins Community College has fully embraced its commitment to equity, positioning shared equity leadership (SEL) as the institution's primary leadership framework even amidst nationwide DEI backlash. The Department of Human Resources at Saint Robins Community College has received essential support from the president to incorporate SEL into the onboarding process for all new hires. Each new employee will participate in a half-day SEL retreat facilitated by a trained SEL facilitator. Additionally, HR is exploring revising the language in all new job postings to include a reference to individual and collective equity responsibilities, ensuring that SEL inclusion in the onboarding process is clearly communicated and not a surprise. These adjustments to policies and practices are vital steps toward fully integrating SEL into the institution's culture, with the aim of enhancing equity for all students.

- ➔ 1. You overhear a newly-hired groundskeeper and a research lab assistant discussing how they can't really recognize the importance of their roles in advancing equity work. How would you respond, especially when thinking about the current political context?

- ➔ 2. One critique of integrating SEL into the onboarding and hiring process is that it may be perceived as overly focused on initial training and easily forgotten once the hiring and onboarding stages are complete. As an HR department, how can you ensure this learning is sustained rather than a temporary initiative? Additionally, how can you emphasize the shared nature of SEL to distribute responsibility for its ongoing practice across the organization?

- ➔ 3. How can you ensure these new policies and practices are maintained and that employees trust and understand the purpose these policies and practices carry?

VIGNETTE 3: Dr. Forest has served as the interim provost at the University of the Plains for an entire academic year. She has no plans to apply for or take on the permanent provost position and intends to return to the faculty instead. Along with some collaborators in student affairs, she has been leading efforts in SEL at the university. However, she and her collaborators are slightly concerned about the leadership transition and its potential impact on their equity goals and the SEL team as a whole. An external search firm is conducting the search for a new provost. In preparation for the interview process, the firm has met individually and collectively with key individuals that Dr. Forest currently works with, as well as other stakeholders, to understand the priorities for the new provost search.

- ➔ 1. How can key SEL values be emphasized in the search for a new provost? How would you convey the significance of these values to the external search firm overseeing the hiring process?

- ➔ 2. How might key members of the SEL team and their networks collaborate with Dr. Forest to ensure that SEL initiatives continue after her departure and remain a priority in the search for a new provost?

- ➔ 3. Three finalists have been invited to campus for a final round interview. The search firm has scheduled an hour for the SEL team to meet with the finalists. What questions would you ask, or what topics would you discuss, to evaluate the candidates' alignment with and preparedness to prioritize SEL practices?

VIGNETTE 4: Paul, the chief financial officer at Miramar City College, leads a small team responsible for ensuring compliance with mandated regulations and facilitating the distribution of funds. His team is known for adopting a finance-first approach, which often neglects the needs of historically-marginalized students and treats equity as an afterthought. Given the uncertainties surrounding federal funding and a recent multimillion-dollar donation from an anonymous donor, Paul and his team have been tasked with developing a policy to allocate funds to students in need. They decided to implement a “first-come, first-served” policy, under which the pool of institutional aid is allocated in the order in which students submit their financial aid documentation. Unfortunately, this means that students who are slower to complete their applications—often those with less support in navigating college-related tasks or those facing complex family situations—receive less aid, if any at all. When President Martinez learns of this policy, she becomes deeply concerned that Paul and his team are not leading or creating with equity in mind, a concern that she knows greatly affects historically-marginalized student populations and campus-wide equity momentum.

- ➔ 1. Putting yourself in President Martinez’s shoes and applying a Shared Equity Leadership lens, what steps would you recommend to ensure that equity-mindedness and shared leadership are prioritized, while also revising the policy?

- ➔ 2. What talking points would you present to Paul and his team to help shift their focus away from a solely financial-first approach?

- ➔ 3. Putting yourself in Paul’s shoes, which values and practices would you lead your team to utilize and prioritize in the creation of a new equity-minded policy? What might be some ways to initiate the personal journey work central to SEL that might help get the rest of the team onboard and ready?



Summative Reflections for Step 7

After completing these exercises, do you feel like you have a clear sense of how you might embed SEL into roles, policies, and practices? Write a summary of your key takeaways from the exercises in this step and how you will enact them. If you do not feel prepared to move toward action, what other information do you need to begin this embedding work?

Step 8

Monitor Progress and Measure Success

As you continue moving forward in your work, make sure you have created mechanisms for monitoring progress on your goals. How are you tracking and measuring progress and success? If you haven't done so recently, now is a good time to revisit your goals (Step 3 and Step 5) and make sure that you have created metrics for determining whether you have met those goals. If you are grappling with what to measure or how to assess your progress, we recommend a resource from the Racial Equity and Justice Institute (REJI) on [Institutional Equity-Minded Indicators](#) (IEIs). The IEIs provide clear examples of evidence that campuses can use to demonstrate progress on equity goals. The exercises in this step will help you reflect on how you can monitor progress toward your goals and measure success in meeting them.

You should also start thinking more broadly about accountability. As you expand the scope of equity work on your campus, who is accountable? What are they accountable for, and to whom? And how are you holding them accountable? For more information on these broader considerations around accountability, please see our report: [Shared Responsibility Means Shared Accountability](#).

➔ Exercise 8.1: Reflecting on How You Will Measure Success

1. What are your top 3-5 goals for your team's work? (revisit Step 3 and Step 5 for a reminder on your goals) Are these goals process-oriented or outcomes-oriented? What specific steps do you need to take to accomplish these goals?

2. Can you connect your goals to a particular level—personal, collective, organizational? If all your goals are at one level, consider how you might expand to address other levels as well.

3. Which values and practices might you draw upon as you work toward your goals?

4. Who will be responsible for different aspects of each goal?

5. What is a timeline you might work toward?

6. How will you know you have been successful? How will you measure progress toward your goals?

➔ Exercise 8.2: Determining Evidence of Success and Responsibility for Meeting Goals

Now it's time to take your reflections and get specific. Place your goals on the chart below at the appropriate level—personal, collective, or organizational. Indicate whether each goal is process-oriented or outcome-oriented. Decide who is responsible for each goal. Responsibility will likely fall upon multiple people for each goal. Finally, in the right column, include data or other evidence of success for each goal.

	Goal	Process- or Outcome- Oriented?	Who Is Responsible for this Goal?	Evidence of Success
Personal Level				
Collective Level				
Organizational Level				



Summative Reflections for Step 8

After completing these exercises, do you feel like you have a clear sense of how you will measure your progress on your goals? Do you have goals and metrics that are both process- and outcome-oriented? Do you have goals and metrics at the personal, collective, and organizational levels? Write a summary of your key takeaways from the exercises in Step 8 and what your next steps will be.

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