CONFRONTING EQUITY ISSUES ON CAMPUS

Implementing the Equity Scorecard in Theory and Practice

EDITED BY *Estela Mara Bensimon and Lindsey Malcom*

Foreword by David Longanecker

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THE EQUITY SCORECARD

Theory of Change

Estela Mara Bensimon

In the Equity Scorecard process, student success in college is framed as an institutional responsibility that requires *race-conscious* expertise. The centrality of race-conscious practitioner expertise distinguishes the Equity Scorecard process from the more familiar models of student success. Prevailing models of student success are based on sociopsychological behavioral theories of student development, integration, and engagement. Typically academic success is described and assessed as behaviors, attitudes, and aspirations that represent how college students, ideally, ought to be. The normative model of academic success focuses on the student's self-motivation and the amount of effort he or she willingly invests into the academic activities that signify he or she is taking on the identity of "college student." The normative model of academic success is exemplified by Vincent Tinto's (1987) theory of academic and social integration, Alexander Astin's theory of involvement, and George Kuh's (2003) model of student engagement. Although there is no lack of evidence that these models capture what it takes to be academically successful in our colleges and universities, there is also plenty of evidence showing that very large numbers of students do not have access to the social networks that can help them develop the knowledge, practices, attitudes, and aspirations associated with the ideal college student.

Practitioners and scholars typically respond to evidence of low rates of college completion by asking questions that focus attention on the student: *Are these students academically integrated? Do these students exhibit desired behavioral patterns? Do these students exert effort? How does the effort of these students compare with the effort of such-and-such group? How do the aspirations*

of high-performing students compare with those of low-performers? Are they engaged? Are they involved? Are they motivated? Are they prepared?

A premise of the Equity Scorecard process is that questions like these reflect a normative model of academic success. That is, academic success is associated with the experiences, behaviors, and values of the full-time, traditional college-age student. When we come across students who are not engaged or involved, who don't take advantage of support resources, or who rarely ask questions or seek help, we judge them as deficient and in need of compensatory interventions. These students often acquire the ''at-risk'' label.

The purpose of this chapter is to introduce a theory of student success that focuses on the knowledge and behaviors of practitioners and institutions, rather than on the knowledge and behaviors of students. Instead of speaking about the racial achievement gap, we focus on the knowledge and cultural gap that undercuts practitioners' capacity to be responsive to the students they *get,* rather than the ones they might *wish* for.

The chapter introduces the concept of funds of knowledge for race-conscious expertise, followed by a discussion of the four theoretical strands: sociocultural theories of learning, organizational learning, practice theory, and critical theories of race that represent the principles of change underlying the Equity Scorecard process. The chapter concludes with the attributes of equity-minded individuals.

Funds of Knowledge for Race-Conscious Expertise

In this section we discuss the meaning of funds of knowledge, how they develop, why the prevailing funds of knowledge that practitioners draw on are inadequate to undo racial patterns of inequity, and how practitioners can develop funds of knowledge that increase their expertise to make equity possible.

The terms *funds of knowledge* (González, Moll, & Amanti, 2005; Moll, Amanti, Neff, & Gonzalez, 1992), *background knowledge* (Polkinghorne, 2004), *tacit knowledge*, *implicit theories*, *cognitive frames* (Bensimon, 2005), and *cultural frameworks,* among many others, have been used by social scientists to describe historically developed and accumulated strategies (e.g., skills, abilities, ideas, practices) or bodies of knowledge that practitioners draw on, mostly unconsciously, in their everyday actions. They draw on these funds of knowledge as they decide what to pay attention to, what decisions to make, or how to respond to particular situations (Polkinghorne, 2004). A

premise of the Equity Scorecard process is that practitioners can make a marked difference in the educational outcomes of minoritized[1] (Gillborn, 2005) students if *they recognize that their practices are not working* and *participate in designed situated learning opportunities to develop the funds of knowledge necessary for equity-minded practice* (Bensimon, Rueda, Dowd, & Harris, 2007).

How do we know that practitioners' funds of knowledge are inadequate for the task of improving the academic outcomes of minoritized populations? Through our work with the many campuses implementing the Center for Urban Education's (CUE's) Equity Model, we have documented the conversations of practitioners as they attempt to make sense of racial patterns of inequity revealed by their own institutional data. The Equity Scorecard process, through its various data tools and data practices, enables practitioners to notice racial disparities in successful completion of remedial[2] courses in English and mathematics; persistence in science, technology, engineering, and mathematics (STEM) majors; transfer to four-year colleges; graduation with honors; and many other fine-grained measures that signify the completion of critical milestones as well as participation in academic opportunities (e.g., studying abroad, doing research with a faculty member, having an internship in a Fortune 500 company, transferring to a highly selective college) that enhance students' likelihood of accessing valued experiences, resources, and social networks.

Our analyses of practitioners' talk consistently show that the prevailing funds of knowledge informing their interpretations of student outcomes reflect widely accepted beliefs about student success. These beliefs are mostly derived from psychological theories of motivation, self-efficacy, and self-regulation, as well as sociological theories of cultural integration. In essence, practitioners have learned to associate academic success with individual characteristics and attributes that signify the motivated, self-regulating, and academically and socially engaged archetype college student. For sure, it is hard to dispute practitioners' desire for college students who are responsible; persist from semester to semester; and graduate, if not in four years, within six. But the reality is that a great many students, particularly those who are first-generation, low-income, immigrant, or from marginalized racial and ethnic groups have been disadvantaged by highly segregated high schools that lacked the resources to prepare them, academically and culturally, for college. Upon entering college these students are further disadvantaged by a college culture that expects them to know the rules and behaviors of academic success: seeking help when in academic trouble, visiting faculty

members during office hours, knowing how to study, and having goals and being committed to them.

These students are not an exception. In many colleges, particularly community colleges and four-year colleges with open admissions policies, they are modal students. Viewed through the normative lens of academic success, these students fall so short of the image we have of academic-ready college students that they have become known as *at-risk.* Herein lies a major obstacle to the agenda of equity in educational outcomes for minoritized students: The funds of knowledge that lead practitioners to expect self-directed students, and to label those who fall short of the ideal *at-risk,* reinforce a logic of student success that is detrimental to an equity change agenda.

The logic underlying the notion of at-risk students goes something like this: "If students are not doing well it must be because they are not exerting the effort/seeking help/motivated; or because they are working too many hours/unprepared for college/disengaged." Framing the problem in this manner is defeatist in that patterns of racial inequity seem inevitable and self-fulfilling. This leaves little hope for practitioner agency. It is also unproductive because a focus on the deficits of students discourages practitioners' deeper reflection about their failure to understand the structural production of inequality or the need for institutional responsibility—in practices and ethos—for producing racial equity in educational outcomes.

To bring about institutional transformation for equity and student success, practitioners, including institutional leaders, have to develop funds of knowledge for equity-minded expertise. We pause here to provide an example that contextualizes the meaning of deficit and equity-minded funds of knowledge through an actual conversation among members of a campus team that participated in one of CUE's early field tests[3] of the "Equity Scorecard" (at the time called "Diversity Scorecard"). This excerpt was adapted from "Learning Equity-Mindedness: Equality in Educational Outcomes" (Bensimon, 2006) to illustrate funds of knowledge that represent a deficit perspective of student success. Throughout the rest of the chapter we will refer to it to show how the Equity Scorecard process attempts to remediate this perspective.

Campuses that adopt the Equity Scorecard process create teams of practitioners based on specific criteria: knowledge; leadership attributes; and forms of involvement in decision making, academic governance, and administrative structures. Institutional researchers are required to be members of the teams because the Equity Scorecard process's initial phases involve the

review of numerical data as a means of raising awareness of inequality at various stages of educational progress and success.

The team portrayed in the following excerpt had been meeting for several months to create indicators for its campus's Equity Scorecard. One of the perspectives of the Scorecard is "excellence" and teams typically examine indicators that, as mentioned previously, illustrate experiences and relationships that give students access to scarce resources that create advantage for a small number of beneficiaries (e.g., honors programs).

Among community college teams a common measure of equity within the "excellence" perspective of the Scorecard is the proportion of students, by race and ethnicity, who transfer to selective colleges. We encourage community college teams to examine transfer patterns to highly selective institutions, particularly the flagship campuses of their public university system because there is a tendency to ignore racial and ethnic access to high-resourced and elite institutions. For example, if the community college portrayed in the excerpt was located in Texas, then the team would look at transfer to UT–Austin or Texas A&M at College Station; if it was located in Wisconsin, then transfer patterns to UW Madison would be the focus of the analysis. In California, transfer into UC–Los Angeles and UC–Berkeley would constitute important metrics of equity.

The Funds of Knowledge Evident in Team Members' Data Interpretations

The following excerpt from a conversation among three members of a community college Equity Scorecard *evidence team*[4] was prompted by data on transfer patterns to the state's highly selective flagship university, which is located about ten miles from the college. To make it easier for the team members to notice the patterns of inequity, the institutional researcher created two pie charts (see Figure 1.1). The pie chart on the left shows that among the almost 18,000 students enrolled in the college, Latinas and Latinos are the largest group, constituting just over 40 percent of the total head count, followed by Whites (35 percent), Asian Americans (13 percent), African Americans (7 percent), and American Indians (4 percent). The pie chart on the right shows that on the particular year being examined, 141 students transferred successfully to the highly selective public university. As can be seen immediately, Latinos' and Latinas' share of the students who transferred to the flagship university is 23 percent, which is considerably lower than their 40 percent share of the total enrollment. In the case of Latinas and Latinos, to have equity in transfer to the

flagship university they would need to increase their share from 23 percent to 40 percent. The pie chart also shows that while White students represent 35 percent of the total student population, their share of the transfer population is 48 percent.

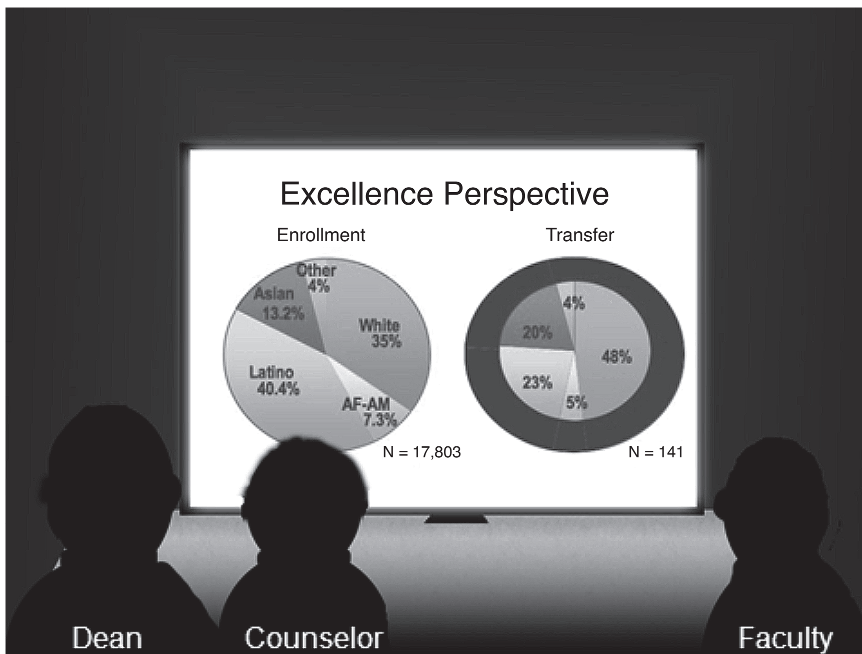
Let's see how three of the team members attempt to create meaning of the equity gaps between enrollment and transfer to the highly selective university campus. As you read the excerpt it is important to concentrate on the language used and reflect on the ways in which unequal outcomes are attributed to students' characteristics, making them the authors of their own inequities.

Dean: More Black and Latino students may transfer to the local four-year college than to the state's leading university because the state college is closer to home.

Counselor: This may be an issue for Latino students because of the pressure from family to remain close to home.

FIGURE 1.1[5]

Members of a community college evidence team comparing the shares of total enrollment and transfers to a selective university by race and ethnicity.



Faculty: It may also be related to financial issues. Many students do not know about financial aid options. They also tend to manage money poorly.

Counselor: Many students don't take advantage of the tutoring and counseling services we offer because they are embarrassed to use them or don't see their relevance to educational success.

Faculty: Or they may not value education intrinsically but see it as a ticket to a well-paying job. Many of our Latino and African American students need remediation due to inadequate academic preparation, but they are not willing to put in the work necessary to be able to transfer. Some of them may need two or three years of remediation even to begin taking courses that are transferable, and this discourages many students.

Based on how these individuals respond to the data, what are they saying and what can be inferred about the funds of knowledge implicit in their interpretations about unequal patterns of outcomes? This is how we read it:

1. The individuals construct a narrative about the pie charts in such a way that inequity, instead of being interpreted as a *racialized* outcome is *rationalized* as a cultural predisposition of Latino and Black students to "stay close to home."
2. The assumption is made that the students may be low income and need financial aid to be able to transfer to the more selective college, but they are not smart enough to take advantage of financial aid opportunities, nor do they have the competence to manage their finances responsibly.
3. The assumption is made that students lack the academic qualifications; therefore, they have to enroll in remedial education courses, taking them longer to get to the college-level courses that will eventually make them eligible for transfer. It is assumed that the students do not help themselves because they don't take advantage of the college's academic support services. Why not? Because, it is assumed, that they are embarrassed to admit they need help or they don't have the motivation; or because they lack the stick-to-itness needed to get through the long sequence of remedial education courses.
4. In addition, it is assumed, these students may not have the cultural or social class predisposition to appreciate education for its own sake. The assumption is that they are more motivated by occupational opportunities than by a general and liberal arts education.

The explanations given by the participants foreground student deficits and take the focus away from the pattern of intrainstitutional racial inequity that is revealed by the transfer patterns in the pie chart. The conversation among the dean, counselor, and instructor bring to mind the "color-mute" (Pollock, 2004) euphemisms that are used in education—"at-risk," "disadvantaged," "underprepared"—to attribute disparities to race and culture without appearing to do so.

The dialogue creates the distinct impression that what *we* interpret as an instance of inequity in transfer patterns these practitioners view as the domino effect of cumulative disadvantages inherent in the students' cultural and social characteristics, which are manifested in lack of self-efficacy, lack of effort, lack of ambition, and avoidance of help-seeking due to hyper self-consciousness. The influence of normative concepts of student success (e.g., commitment, effort, motivation, and integration) are discernable in the team members' attribution of small transfer numbers among Latinas and Latinos to inadequate values, not having the right attitude, and not engaging in desirable behavioral patterns.

Although it is possible that the practitioners in the illustration may not be familiar with the scholarly literature on college student development and success, it is highly likely that they have been exposed to key concepts such as engagement, involvement, effort, and integration in conference workshops, professional development activities, newsletters, and websites, as well as in courses offered in higher education graduate programs in student affairs and administration.

In the context of our theory of change, it is important to note the following: The practitioners depicted previously reacted to the data display spontaneously and in the moment. Their talk was "unrehearsed" (Perakyla, 2005). Their interpretations of the data represented in the two pie charts are informed by their funds of knowledge, which have been acquired over time and which they draw on unconsciously. These funds of knowledge (also called "the background" by Polkinghorne) function mostly below consciousness (Polkinghorne, 2004).

Like the practitioners depicted in this brief conversation, the funds of knowledge that most higher education practitioners have developed do not encourage reflection on ways in which their practices, judgments, and beliefs may contribute to or exacerbate the production of racially unequal outcomes. Entertaining the possibility that inequality may be as much a problem of practitioner knowledge, pedagogical approaches, or "culturally held" ideas about minoritized students (Nasir & Hand, 2006) is not a typical

practice within institutions of higher education or among academic leaders and policymakers. This is not because practitioners, leaders, and policymakers are irresponsible or uncaring, but because most of us lack the funds of knowledge to assist us in noticing patterns of racial inequity and, once noticed, to be able to analyze them as a failure of structures, policies, or practices that can be changed.

The challenge, therefore, is how to create the funds of knowledge that are needed to bring about equity-minded institutional transformation. In order for the practitioners in the community college evidence team to reframe their interpretations within the perspective of failed institutional practices rather than failed students, they would need to have the funds of knowledge that help them recognize that the problem depicted in the pie charts is an indeterminate situation (Dewey, 1938; Polkinghorne, 2004). This means that the reasons for the inequities in transfer are unknown and demand a disciplined inquiry into the possible causes. The inquiry needs to start from questions that turn attention to the realm of the practitioner and the institution, rather than to the realm of the students, as was done by the members of the community college evidence team. When inquiry is framed from the standpoint of the practitioner and his or her practices, the questions that can lead to substantive learning and change include (a) How is transfer "done" here? and (b) In what ways might we be "doing" transfer that results in unequal outcomes for African Americans and Latinos and Latinas? Simply put, practitioners need to *learn* how to ask, "In what ways are our practices failing such-and-such students" and *unlearn* to ask, "What is wrong with these students?"

In sum, we lack the funds of knowledge that would enable most of us to notice racial inequities within our classrooms, departments, schools, and institutions. Moreover, when they are brought to our attention we lack the funds of knowledge to ask, "In what ways are my practices, or the practices of this institution, related to racial inequities in outcomes?" "In what ways are institutional practices enabling or reinforcing racial inequities in outcomes?"

Reframing the problem from one having to do with what is wrong with students to one having to do with the inadequacy of practices is a major cultural and intellectual challenge. To question our own efficacy or knowledge goes against our identity as professional experts. Additionally, the suggestion that the solution to the problem of inequity may lie in taking a hard look inward into institutional practices—as well as our own within the classroom, the counseling office, the dean's office, or the president's

cabinet—goes against the inclination to externalize the problem and jump to solutions that typically involve the adoption of proven "best practices."

It is also worth pointing out that the Equity Scorecard process attempts a major shift in the ways leaders, policymakers, practitioners, and scholars think about how colleges work (Birnbaum, 1988), how they learn, and how they can change. While this book is not about theories of organizational change, readers will note that the Equity Scorecard process's conceptualization of change, as an outcome of practitioner engagement in situated learning, represents a considerable departure from conventional perspectives. These conventional perspectives center on change as an outcome of rational actions induced by strategic planning, data-based decision making, external accountability systems, instrumental incentives, restructuring, or adoption of best practices.

In the next section we present the key principles of the Equity Scorecard process and we will return to the example of the community college evidence team to illustrate them in action.

The Equity Scorecard Process: Principles of Institutional Change

The aim of the Equity Scorecard process is to assist practitioners in developing new funds of knowledge that empower them with the expertise, know-how, and self-efficacy to produce equity in outcomes within their classrooms, departments, and institutions.

The theory of action used within the Equity Scorecard process draws on principles of learning and change derived from sociocultural activity setting theory, organizational learning theory, practice theory, and critical theories of race. First, it draws on the *sociocultural idea* that (a) learning is social, (b) learning is facilitated by assisted performance that is responsive, (c) learning is mediated by cultural tools and artifacts, and (d) learning takes place in communities of practice and is indexed by changes in participation within these communities (Rogoff, Baker-Sennett, Lacasa, & Goldsmith, 1995; Roth & Lee, 2007; Rueda, 2006; Tharp & Gallimore, 1988; Wenger, 1998; Wenger, McDermott, & Snyder, 2002). Although these concepts of learning have been mostly applied to the study of learning among children, they are relevant to the study of learning among adults, particularly when combined with theories of organizational learning.

Second, *organizational learning* theorists (Argyris, 1977, 1982, 1991; Argyris & Schön, 1996) differentiate between two types of learning: single loop

and double loop. Single-loop learners are prone to externalize problems by attributing them to forces and circumstances that are beyond their control. Single-loop learners tend to view evidence of inequities in educational outcomes as evidence of student deficiencies and they resort to compensatory strategies as the solution (Bensimon, 2005). Examples of single-loop learning solutions are a ubiquitous characteristic of college campuses, from the most elite to the least selective. Special support service programs such as TRIO, Puente, the Mathematics, Engineering, Science, and Achievement (MESA) program, and many more reflect single-loop learning solutions in that their focus is to equip students with the academic and cultural knowledge to survive in institutional cultures that may be hostile to their presence and not self-reflective about race and racialized practices. The trouble with solutions based on single-loop learning is that they leave internal values, norms, and beliefs unchallenged. Double-loop learning focuses attention on the root causes of a problem and the changes that need to be made in the attitudes, values, beliefs, and practices of individuals and organizations to bring about enduring results (Bauman, 2005).

Lest we be misunderstood, we are absolutely convinced that without the many special support and academic programs referenced previously, racial and ethnic inequity in higher education would be a lot worse. These programs provide racial and ethnic minority students with access to a network of professionals who often share the students' racial and social class backgrounds and have the experiential knowledge to be responsive to students' needs and, when required, are able to advocate on their behalf. These professionals often see themselves in the students and are able to adjust their practices to the situation of students labeled "at risk." They have the experiential know-how to understand the difficulties of navigating an alienating environment, thus giving them an insight into students' actions that individuals who don't see themselves in the students lack.

In labeling such programs the product of single-loop learning, my intent is not to be derogatory or overlook the extraordinary role these programs have played on campuses everywhere. Quite the contrary, having spent the first ten years of my professional life in various roles associated with "compensatory" programs, I am very cognizant of their critical role in mediating the success of first-generation students from racial and ethnic communities with a history of exclusion. What I am critical of is the hierarchical stratification of institutions of higher education that marginalizes programs for minority students and separates them from the institutional "mainstream," causing students to miss out on the opportunity for double-loop learning.

Given the mission of these programs and the racial diversity of their leadership and staffing, I speculate that they have accumulated valuable knowledge and experience about the ways in which minoritized populations experience the campus. However, their often marginal status prevents them from spreading their know-how throughout the institution. This may be the reason why, despite the myriad of compensatory programs, gaps in educational outcomes persist and even get larger.

Third, the Equity Scorecard process takes a different approach to framing the problem than do theories of student success. Rather than starting out with students' characteristics and poor academic preparation as the culprit for inequity in educational outcomes, we frame *inequity as an indeterminate problem of practice.* We use the term *practice* broadly in reference to the actions of individuals such as an instructor, a counselor, or a dean, as well as to the practices and policies inscribed in an institution's structural arrangements and cultural characteristics. Practice theorists, drawing on the work of Dewey (1938) and Vygotsky (1978, 1934/1987), maintain that practitioners learn and change when they encounter an indeterminate situation that makes them realize their actions are not producing the results they hoped to obtain. According to Polkinghorne (2004), an indeterminate situation is one in which practitioners find that "their practices fail them." We apply these ideas in the Equity Scorecard process by framing inequity in educational outcomes as an indication that practices—at the individual or institutional level—are failing to produce the expected results for students from particular racial and ethnic groups. That is, rather than conceiving of inequity as a sign of student failure, we view it as a sign of institutional malfunction that calls for an investigation to learn what is not working and what changes need to be made. The changes may be in structures, pedagogical approaches, delivery of services, professional development, or policies; they may also need to be changes in individuals' knowledge and beliefs about race that prevent them from making judgments about what to do to facilitate the success of students of color.

In *Practice and the Human Sciences: The Case for a Judgment-Based Practice of Care,* Donald Polkinghorne (2004) focuses on the "practitioner as the factor that produces change" by engaging in "judgment-based" decision making. The notion of the practitioner as the agent of change is essential to understanding the theory of action that distinguishes the Equity Scorecard process from other approaches and interventions. An important premise of the Equity Scorecard process is that the failure of practice (i.e., inequity) is

caused by practitioners' lack of requisite knowledge to create successful outcomes for racial and ethnic minority students. For example, practitioners may not be aware of the extra "cultural effort" (Dowd & Korn, 2005; Tanaka, 2002) that is imposed by predominantly White institutional cultures on students who have experienced discrimination, exclusionary practices, and the general sense of being outsiders (Bensimon, 2007; Peña, Bensimon, & Colyar, 2006).

As already discussed, higher education practitioners have been socialized to expect autonomous and self-regulating students who take responsibility for their own learning and they often assume that students know how to be students. Consequently, they may unconsciously attribute the lower rates of success that are experienced by African American, Latina, and Latino students, and other minoritized groups, to individual characteristics and backgrounds rather than to educational practices, institutional policies, and culture. Attributing unequal educational outcomes to students' lack of academic preparation, motivation, help-seeking behaviors, or engagement is problematic because, in addition to blaming the student, race-based disparities are made to appear as a natural occurrence that is not within the control of higher education practitioners.

Fourth, *race-consciousness* is central to the Equity Scorecard process. Being race-conscious requires that individuals learn to see the ways in which race is embedded in everyday practices. Critical race scholars (Harper, Patton, & Wooden, 2009; Ladson-Billings, 2006; Matsuda, Lawrence, Delgado, & Crenshaw, 1993; Solórzano, Villalpando, & Oseguera, 2005; Yosso, Parker, Solórzano, & Lynn, 2004) contend that inequality is produced and maintained by the routine practices of institutions and the cumulative effect of racial micro-aggressions. Thus, from a critical race perspective, the claim that inequity in educational outcomes is race-neutral would be challenged. In order to close the opportunity gaps that disadvantage the educational experiences of racial and ethnic groups, it is necessary to reinterpret inequity in educational outcomes from the perspective of those who experience them, taking into account the social, cultural, and historical context of exclusion, discrimination, and educational apartheid.

These four theoretical strands: sociocultural theories of learning, organizational learning, practice theory, and critical theories of race inspired the principles of institutional learning and change that make up the Equity Scorecard process. In the next section we describe these principles further.

Principles of Change Underlying the Equity Scorecard Process

Principle One: Practitioners learn and change through their engagement in a joint productive activity. (Sociocultural theories of learning)

To develop equity-minded funds of knowledge, the Equity Scorecard process relies on the strategy of creating "activity settings" (Roth & Lee, 2007) that call on practitioners to perform actions requiring new competencies. These activity settings are structured in ways that both draw on and challenge established competencies, placing learners in the "zone of proximal development," where the new competencies for equity-minded leadership are within reach (Tharp, 1993; Tharp & Gallimore, 1988) and obtainable through a process of "situated" inquiry (Bauman, 2005; Lave & Wenger, 1991; Peña et al., 2006). An activity setting consists of individuals who collaborate on a joint productive activity. In the Equity Scorecard process the activity involves the examination of routine data on student outcomes disaggregated by race and ethnicity and the construction of indicators and goals to populate the four perspectives of the Equity Scorecard. The activity setting is designed to raise practitioners' awareness of inequities and to help practitioners learn to examine their own settings to determine how inequities are created and sustained and consider how practices, structures, and policies might be changed.

As already shown in the scenario introduced earlier, the funds of knowledge practitioners rely on are reflected in their dialogues to create meaning out of the data. For example, in the earlier scenario the dominant funds of knowledge that the practitioners call upon to make sense of the data patterns exemplify what some scholars have described as "bootstrap ideology" (Horvat & O'Connor, 2006), deficit paradigms (Valencia, 1997), or culture of poverty (Valencia, 1997). In the Equity Scorecard process, we use the term *deficit-minded* in reference to the funds of knowledge that prevent individuals from seeing racial inequity or cause them to interpret disparities as a deterministic deficiency that afflicts Latinos, Latinas, and African Americans in particular. The change project of the Equity Scorecard process is to assist practitioners to become aware of deficit-mindedness in themselves and others, as well as in structures and policies that may disadvantage minoritized populations.

Principle Two: Inequity in educational outcomes is characterized as an indeterminate situation produced by a failure of practice. (Practice theory)

The development of practitioners into agents of equity for students of color requires that they react to data showing inequity in educational

outcomes as evidence that something is not working. The reasons for the dysfunction could be many things; however, in the Equity Scorecard process the possible sources of the dysfunction are restricted to characteristics of institutional structures, policies, practices, and culture that can be changed through the individual and collective actions of leaders, including trustees and practitioners.

To facilitate an understanding of inequity as a symptom of institutional dysfunction, data revealing patterns of inequity, such as those shown in the pie charts in Figure 1.1, are characterized as an "indeterminate situation" (Dewey, 1938)—that is, a situation in which the *institutional basis of malfunction* is unknown. To view disparities in student outcomes as an indeterminate situation triggered by an institutional malfunction requires practitioners to learn how to frame problems so that they, not the students, are the target of change. The interpretation of inequities in educational outcomes as a failure of practice goes against academic culture; moreover, the positing of situated learning (i.e., inquiry) as a strategy of change can prove to be challenging because institutions of higher education are not organized to learn about themselves (Dill, 1999; Garvin, 1993).

In order to overcome the cultural and organizational conditions that stand in the way of practitioners learning to view inequity as an indeterminate situation that calls for inquiry to discover why and in what ways practices are failing to produce expected outcomes, the CUE has created specialized tools, processes, structures, and expert assistance from individuals who are knowledgeable in the four theoretical strands that are foundational to the Equity Scorecard process.

It would be natural to ask, "Why is it necessary to define inequity as an indeterminate situation arising from institutional failure?" We realize that inequities in educational outcomes are multidimensional, complex, and unique. We also recognize that they have been produced over time by the great inequalities in income, wealth, health, and housing that have long divided the United States into separate and unequal worlds (Hacker, 2003). Delimiting the problem of inequity to a failure of institutional practice is a pragmatic decision to define it in a manner that is conducive to institutional action and change.

To make the concepts of indeterminate situation and institutional dysfunction or failure of practice more concrete, let us turn our attention once again to the scenario of the community college evidence team introduced in the previous section. In our model, one approach to defining equity in transfer rates is based on population proportionality. Applying this definition of

equity to Latinas and Latinos would mean that the number who should have transferred to the flagship university is 58 (41 percent of 141). Instead, there were only 32 Latinas and Latinos who transferred, 26 fewer than there should have been. Needless to say, we have no idea why there were 26 fewer Latino and Latina transfers to the flagship university. It is an indeterminate situation that causes practitioners to inquire: What might we be doing or not doing that is causing us to be less effective in transferring Latina and Latino students to the flagship university? To answer this question and be proactive to remedy the situation, the Equity Scorecard process engages practitioners in a set of planned inquiry activities to unpack the problem and collect numerical and qualitative data. In education there is currently a big emphasis on data, data-based decision making, and a movement to create humongous data systems. Through our work we have learned that student unit record data are indeed important in helping to pinpoint problems. But we have also learned that unless practitioners or policymakers have the capacity to frame basic and practical questions, neither the quantity nor quality of data can compensate for the lack of good questions. Our experience suggests that the more familiar institutional actors are with particular conditions, structures, or situations, the more difficult it is for them to know what to ask in order to pull apart the "black box" of, say, transfer, remediation, completion of key milestones, persistence in STEM fields, and so on.

In the case of the missing Latinos and Latinas transferring to the elite flagship university, some of the questions that need to be asked to get at what may be causing the discovered inequity include the following:

- What are the requirements to transfer to an elite flagship university?
- How many students, disaggregated by race and ethnicity, meet those requirements?
- Of the students who were eligible to transfer to an elite flagship university, how many actually applied, were admitted, and subsequently enrolled?
- What are the current practices in place to assist students to transfer to elite flagship universities?[6]
- What can be learned about the quality of our transfer practices by talking to Latinos and Latinas who transferred to an elite flagship university?
- What can be learned from institutions that are successful in transferring Latinos and Latinas to an elite flagship university?

The Equity Scorecard process assists evidence teams in arriving at the bulleted questions and to design inquiry activities to answer them. The knowledge that is created by practitioners inquiring into the bulleted questions has several advantages that make the effort and time invested into inquiry worthwhile. Locally generated knowledge is more meaningful to those who have to solve the problem than knowledge produced by an expert consultant; the inquiry focus on the failure of practices, structures, or policies produces knowledge about things that can be acted on (i.e., if they are not working they can be changed or eliminated; if a process or procedure or structure does not exist it can be created; and the results of changing, eliminating, or creating something can be assessed to determine whether or not they are working).

Admittedly, the bulleted questions that have been proposed to get inside the black box of transfer to the elite flagship university appear to be commonsense, perhaps overly simple. But their simplicity is the very thing that prevents institutional actors from asking them. It is difficult to put things that are taken for granted and are assumed to be known and understood, like the process of transfer, under a microscope. As a consequence, asking commonsense, basic questions takes a lot of well-planned and assisted instruction. The Equity Scorecard process provides the data practices and data tools that assist practitioners to implement the methods of situated inquiry and generate locally meaningful knowledge (Lave & Wenger, 1991) to bring about change.

Principle Three: Practitioner-led inquiry is a means of developing awareness of racial inequity and self-change. (Practice theory and organizational learning theory)

As shown in the pie-chart illustration, the Equity Scorecard process employs data practices to make them visible to practitioners, who in turn draw on their experiential knowledge to make sense of them. In the pie-chart illustration, the practitioners' experiential funds of knowledge result in deficit-minded hunches (i.e., inequity is externalized and attributed to student characteristics). The hunches provided by the practitioners are an example of single-loop learning.

To assist evidence team members in reframing their hunches so that they lead to double-loop learning, an experienced facilitator who is familiar with the Equity Scorecard process's theory of change assists participants by redirecting their hunches and focusing them on cultural practices, structures, and policies. Returning to the pie-chart example, let us take a look at how

the faculty member's statement can be reframed, from a deficit pertaining to students to a deficit pertaining to the institution.

Deficit-minded framing (Single-loop learning)	**Equity-minded framing (Double-loop learning)**
Faculty Member: *It may also be related to financial issues. Many students do not know about financial aid options. They also tend to manage money poorly.*	**Faculty Member:** *It may also be related to financial issues. We may not be doing a good job of letting students know about the different options for financial aid. We assume that because the information is available at the financial aid office or on the website, everyone is aware of it. When was the last time any of us looked into how students find out about financial aid?*

The first statement is labeled *single-loop learning* because the faculty member externalizes the problem and blames it on students' lack of knowledge about resources as well as inability to manage their money responsibly. Single-loop learning typically treats the symptoms of a problem without addressing its root causes. Student knowledge about financial aid can be reframed as a double-loop learning problem by asking whether the institution is being responsive to the needs of their students and providing financial aid services actively and in a caring way.

In the rewritten double-loop version, the statement points to some of the potential practices that could be inquired into. The inquiry questions underlying the statement are: (a) In what ways do we currently provide information on financial aid to students? (b) What might be hidden obstacles to getting information about financial aid? (c) What is our expertise in financial aid opportunities for transfer students? A community college that took up this question discovered that the office charged with providing information about scholarships operated only during certain times of the year that coincided with the deadlines for transfer applications. Consequently, the handful of students in the honors program (where minority students were severely underrepresented) were the most likely to get the information because they had a dedicated transfer counselor.

In the Equity Model, the first frame reflects what we have labeled as "deficit-minded" hunches or hypotheses, in which students are blamed for the inequities they experience. The second frame is labeled "equity-minded"

because it places the institution as the responsible agent for the unintended creation of inequity and for the actions to correct it.[7]

Admittedly, solutions that focus on student deficiencies may work in the short term, but they will not change the cultural practices, structures, power relations, values, and other contextual factors that produce racial inequities in educational outcomes. In contrast, when "practices" and "practitioners" are the subject of the hunches there is increased likelihood that inquiry will lead to incremental corrective steps and that engagement in the process of inquiry will result in practitioner learning and self-change that has a direct and immediate effect on the students with whom these practitioners come into contact. For example, at an Equity Scorecard process community college, a professor who participated in an inquiry project designed to examine the culture of transfer (Bensimon, Dowd, Alford, & Trapp, 2007) became more conscious of the role he could play in developing students' transfer aspirations and providing them with direct assistance. He took several actions that let students know he cared about their transfer aspirations and was available to provide information about the process and options. A few months after the project was completed he wrote an exuberant e-mail:

> I want to fill you in on some good news. Three of my former students have been accepted to Berkeley for the Fall as philosophy majors. (Is that wild or what?) In addition, a student that I recommended for the Jack Kent Cooke scholarship not only got the scholarship, but he got accepted to UCLA, Berkeley, and Stanford! He's accepted the full ride at Stanford where he will probably major in sociology with a minor in African American studies. And these are just the students who I've run into over the past two weeks!

This example supports the notion that individuals can become agents of change as a result of inquiring into an institutional problem of inequity. On the other hand, the excerpt also points to our unfinished work. To become an equity-minded practitioner means to be race-conscious and aware of who benefits from one's actions and who is not benefitting. The e-mail does not specify whether the three students accepted as transfers to Berkeley were members of the racial and ethnic groups that experience the greatest inequities in transfer to highly selective institutions—African Americans and Latinas and Latinos. Similarly, the only hint about the racial background of the student winning the Jack Kent Cooke scholarship (designated specifically for low-income students) is his intended major.

Principle Four: Equity-minded practitioners are race-conscious. (Critical theories of race)

Creating awareness of inequity is the first step toward change. It is possible for practitioners and leaders to become aware of racial inequities in educational outcomes, willingly engage in inquiry into the problem, enthusiastically endorse the process, yet hold on to an interpretive framework that perpetuates the status quo. Straight talk about race and inequity proves to be a difficult undertaking and practitioners tend to be more comfortable talking about low-income students, or diversity or success for all students, even when educational reform initiatives purport to serve students of color. Essentially, it is extremely difficult to move from creating awareness of inequities to the point where practitioners are able to ask, systematically,

> Why are our practices failing to assist African American students? In what ways might my practices contribute to the formation of inequity in educational outcomes for Latinas and Latinos? In what ways do I use my resources, including power, authority, knowledge, and social networks, on behalf of minoritized student populations?

The political and racial environment of higher education, as well as the culture of the profession, poses barriers to the analysis of inequity as a failure in practice. However, unless practitioners develop the qualities of equity-mindedness, it will be very difficult to accomplish the national goals for college completion. President Obama has declared that the United States will become the world's best-educated country by 2020. To reach this goal will require that the United States produce 8.2 million additional degrees (National Center for Higher Education Management Systems, 2010). Needless to say, in states like California, Texas, Arizona, and New Mexico, as well as in cities like New York, Newark, Detroit, Union City, Paterson, Miami, Chicago, Milwaukee, Phoenix, Denver, and others with a growing concentration of non-Anglo populations, achieving these ambitious college degree completion goals will require a dramatic increase in racial and ethnic equity in college access and completion. To address this challenge we need to develop the qualities of equity-mindedness among policymakers, leaders, and practitioners.

The Attributes of Equity-Minded Individuals

Equity-minded individuals are more aware of the sociohistorical context of exclusionary practices and racism in higher education and the impact of

power asymmetries on opportunities and outcomes for African Americans and Latinas and Latinos.

The qualities of equity-minded individuals include:

- Being color-conscious (as opposed to color-blind) in an affirmative sense. To be color-conscious means noticing and questioning patterns of educational outcomes that reveal unexplainable differences for minoritized students and viewing inequalities in the context of a history of exclusion, discrimination, and educational apartheid. Example: Recognizing that help-seeking practices such as going to a tutor, making an appointment with an instructor, or joining a study group require greater or lesser cultural effort based on one's race, social class, and experiential knowledge (Dowd & Korn, 2005; Tanaka, 2002).
- Being aware that beliefs, expectations, and practices assumed to be neutral can have outcomes that are racially disadvantageous. Racial disadvantage is created when unequal outcomes are attributed to students' cultural predispositions or when practices are based on stereotypical assumptions about the capacity, aspirations, or motives of minoritized populations. Example: Not encouraging Latinas in community colleges to consider transfer opportunities to selective colleges because it is taken for granted that they prefer to stay close to home or their families will not allow them to go away.
- Being willing to assume responsibility for the elimination of inequality. Rather than view inequalities as predictable and natural, allow for the possibility that they might be created or exacerbated by taken-for-granted practices and policies, inadequate knowledge, a lack of cultural know-how, or the absence of institutional support. Example: Noticing racial patterns in activities within or outside the classroom that accumulate advantage for students, such as an honors program, leadership positions, tutors, residential advisors, or study abroad.
- Being aware that while racism is not always overt, racialized patterns nevertheless permeate policies and practices in higher education institutions and maintain racial hierarchies despite increasing diversity.

What makes the Equity Scorecard process approach to institutional learning and change effective? Essentially, if practitioners do not recognize that inequities exist and that such inequities are abnormal and unacceptable,

then there will be no inquiry into the problem. As mentioned earlier, learning how to view racial patterns of disparity in educational outcomes as an indeterminate situation represents a difficult mind shift for educators who think they know the causes for student success and are not accustomed to admit uncertainty or doubt. For example, the individuals in our pie-chart illustration assume they know the reasons for the inequity in transfer rates to the flagship university.

In order to view the problem as indeterminate, these individuals will need to become aware of their tacit knowledge (Argyris & Schön, 1996; Greenwood & Levin, 2000; Polkinghorne, 2004) about student success. They will need to take notice whether in their search for explanations and solutions, they focus their attention on students' deficiencies or the characteristics of practitioners such as their beliefs, knowledge, and self-efficacy. Becoming aware of one's tacit knowledge requires the assistance of individuals who can model how to differentiate between deficit and equity perspectives. The critical reframing that is essential to the Equity Scorecard process requires a facilitator who is an expert in the theory underlying the technical and procedural aspects of implementing the model. Otherwise, it becomes a data exercise that leaves institutional and individual values untouched.

Unique characteristics of higher education institutions—such as the faculty's control over the curriculum and teaching, and the loosely coupled (Weick, 1976) relationship among academic disciplines and departments and student services (Birnbaum, 1988)—make rational and linear change approaches practically impossible. Nevertheless, the culture of administration and policy making privileges action over questioning because questioning conveys not knowing what to do and not understanding what the problem is; questioning is antithetical to the action-oriented and problem-solving characteristics of administrative culture. On the difficulties of cultivating doubt (Weick, 1979), Dewey (1900) observed, "The natural tendency of man is not to press home the doubt, but to cut inquiry as short as possible. . . . Any prolongation of it is useless speculation, wasting time and diverting the mind from important issues" (p. 466). For this reason, it takes a great deal of discipline and expert facilitation for action-oriented practitioners and leaders to learn to ask *Why? Why? Why?* (Boudett, City, & Murnane, 2005) in response to evidence of inequities, and it is equally important that they learn to limit their *Because, Because, Because* to institutional-level variables within their control, rather than to student attributes.

Challenges Encountered in the Implementation of the Equity Scorecard Process

Why have I spent so much time on the Equity Scorecard theory? One of the barriers to learning the Equity Scorecard process is that practitioners often are impatient for solutions and may see time invested in the foundational aspects of the intervention as wasted time, or they may assume that they know the theory. One of the dangers of not understanding the theoretical underpinnings of the Scorecard is that practitioners may unknowingly turn it into a ''lethal mutation'' (McLaughin & Mitra, 2001, p. 307) that undermines or violates the principles of change. One of the vulnerabilities of the Equity Scorecard is that implementers will see it simply as a framework to organize data more coherently. Implementers who view the Scorecard as a ''data tool'' lose sight of its equity-oriented sensemaking purposes and mistakenly assume that having the capacity for sophisticated data analysis is all that is needed to implement the Scorecard. The data are necessary to engage in equity sensemaking. However, unless the practitioners involved understand that the purpose of examining disaggregated data is to create a context to talk about race and equity, the data itself will not make a difference. Successful implementation of a theory-based change approach depends on implementers' having a deep understanding of the theory and principles and being able to apply them in the context of their everyday practices.

In the tradition of Dewey (1938), the motive of the Equity Scorecard approach is to create an ''indeterminate situation'' that will spark the realization for practitioners that their actions are not producing successful results for minority students. The inquiry activities that compose the Equity Scorecard are structured to bring into the open practitioners' interpretations of inequalities, increasing their awareness of perspectives that make inequality appear natural, and encouraging them to take responsibility for the educational outcomes of minority students. The purpose of inquiry is to create a situation that prompts practitioners to raise questions such as: ''How ought we to teach in order to be responsive to minority students?'' ''How do we think about our responsibility for minority student outcomes?'' ''How do we think about equity?'' ''How do we know who benefits from the initiatives, innovations, and programs that we are so proud of?'' ''How do the assumptions we make about our students disadvantage them?'' ''How do best practices take race and equity into account?'' ''How can we eliminate inequalities in educational outcomes?''

Now that we have explained the theory of change underlying the Equity Scorecard approach, in the next chapters we describe the various means, including tools, activities, language, and processes that we have developed to implement it.

Notes

1. "Minoritized" groups represent "involuntary minorities" (Ogbu, 1990) because their presence in the United States came about as a consequence of enslavement (African Americans), conquest (American Indians, Mexican Americans), and colonization (Puerto Ricans and Native Hawaiians) (Bartlett & Brayboy, 2005). Hence, the term *minoritized populations* is used intentionally to represent more accurately the historical and legal circumstances that resulted in the creation of "minority" populations. The prevalence of educational inequality among minoritized populations is the legacy of exclusionary practices (e.g., forbidding the teaching of reading to slaves), legal segregation, mandatory instruction in English, and inferior schools and resources (Ladson-Billings, 2006).

2. We use the term *remedial* in reference to courses offered in two- and four-year colleges that are categorized as precollegiate level and typically do not count toward requirements for degrees or transfer to baccalaureate-granting institutions. Remedial education courses are also identified as "basic skills" or "developmental education." We recognize that "remedial" is a term that attributes academic deficits to students and its use can perpetuate the deficit-minded thinking the Equity Scorecard process was designed to challenge and eliminate. We use *remedial* because it is the most likely term to be understood by readers.

3. CUE's Equity Scorecard process evolved from a pilot project funded by the James Irvine Foundation that included fourteen two- and four-year public and independent California colleges.

4. In the Equity Scorecard process campus teams are called *evidence teams* because their role is to hold up a mirror to their respective institutions and reflect the status of students on educational outcomes. From an organizational learning perspective, the members of an evidence team have the responsibility of learning on behalf of their institutions and spreading their learning to the campus through various administrative and governance structures.

5. This illustration is excerpted from a longer article (Bensimon, 2006).

6. The Missing 87 (Bensimon, Dowd, et al. 2007), http://cue.usc.edu/tools/Bensimon_Missing%2087%20Institutional%20Report.pdf, describes the inquiry activities of a team of faculty and staff at Long Beach City College in California that set out to find out why transfer-ready students did not transfer.

7. Single- and double-loop learning are not the same as deficit- and equity-mindededness. However, there is some overlap in that both single-loop and deficit-minded statements seek external causes for problems and seek solutions to "fix" people or things without probing into the circumstances, including values and beliefs that may be the cause. Double-loop learning and equity-mindedness are similar in that both are focused on exploring values, assumptions, and organizational

culture that may be contributing to a particular problem. The difference between the two is that equity-mindedness involves the recognition of race and racism, whereas the literature on double-loop learning is silent on this issue.

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