Navigating the Margins of Power: A Qualitative Study Examining How Chief Diversity Officers Make Meaning of Their Role Conditions in U.S. Four-Year Institutions

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Abstract

Chief Diversity Officers (CDOs) have become central to advancing diversity, equity, inclusion, and belonging (DEIB) initiatives in higher education, yet research continues to document structural conditions that limit their authority, influence, and long-term sustainability. The purpose of this basic interpretive qualitative study was to examine how CDOs at U.S. four-year institutions make meaning of their role conditions and how those interpretations shape their leadership strategies. Guided by a constructivist epistemology and informed by institutional theory, transformational leadership theory, and intersectionality, semi-structured interviews were conducted with senior-level CDOs currently serving or recently serving within five years. Data were analyzed using Braun and Clarke's six-phase thematic analysis. Findings revealed that participants frequently navigated proximity to executive leadership without corresponding authority, experienced resources as necessary but insufficient for institutional influence, and continuously negotiated professional legitimacy. Participants also described responding to external sociopolitical pressures while managing cumulative emotional and ethical burdens. Findings suggest that the effectiveness and sustainability of CDO roles depend on institutional alignment of authority, resources, organizational placement, and executive leadership support.

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This dissertation stands as both a scholarly contribution and a tribute to the communities that have supported and inspired me along this journey.

DEDICATION

This work is dedicated to my parents George, II. and Debra, my late great-grandmothers, my grandfather George, Sr. & late grandmother Mary, my grandmother Micaela and bonus grandfather Leo, and my late best friend Llami. Your sacrifices, examples, and unconditional love remain driving forces throughout my life and have sustained me throughout my courses, dissertation writing, data collection, and beyond. This is for you. I love you all, eternally.

Chapter I

Introduction to the Study

Overview

Over the past two decades, the presence of a Chief Diversity Officer (CDO) in higher education has evolved from nascent to standard, with notable growth in executive leadership dedicated to diversity, equity, inclusion, and belonging (DEIB) (Bradley et al., 2022; Williams & Wade-Golden, 2013). Leon (2014) and Worthington et al. (2014, 2020) further documented this trend, showing how institutions establish governance structures to embed DEIB into institutional strategy. Yet, as Williams et al. (2021) and Parker (2019) caution, the rise of diversity leadership does not automatically translate to transformative institutional change. Instead, these roles are often situated within long-standing institutional structures shaped by symbolic gestures and resistance to deep organizational reform (Dancy et al., 2019; Williams et al., 2021). This reality complicates the growth narrative, raising important questions about the actual influence CDOs wield in practice.

The CDO role in higher education emerged from earlier institutional efforts to address civil rights compliance, affirmative action enforcement, and equal opportunity oversight (Williams & Wade-Golden, 2013; Wilson, 2013). Following the Civil Rights Movement and the passage of federal anti-discrimination legislation during the 1960s and 1970s, colleges and universities established administrative offices dedicated primarily to regulatory compliance related to race, gender, and access (Williams & Wade-Golden, 2013; Wilson, 2013). These early diversity-related administrative functions were typically positioned within human resources, legal compliance, or student affairs divisions and focused largely on monitoring institutional adherence to federal mandates rather than leading systemic organizational change (Williams & Wade-Golden, 2013). Over time, demographic shifts in the student population, expanded understandings of equity and inclusion, and growing demands for institutional accountability prompted institutions to reconsider diversity work as a strategic priority rather than solely a compliance function (Williams et al., 2005; Worthington et al., 2014).

By the late 1990s and early 2000s, higher education institutions increasingly recognized the need for centralized leadership to coordinate diversity initiatives across academic and administrative units (Williams & Wade-Golden, 2013; Wilson, 2013). This shift contributed to the emergence of senior-level diversity leadership roles designed to embed equity priorities into institutional planning, governance, and organizational culture (Williams & Wade-Golden, 2013; Wilson, 2013). The formalization and professionalization of the CDO role accelerated during the early twenty-first century, as national professional organizations and scholarly frameworks began outlining standards of practice, leadership competencies, and institutional placement recommendations for diversity executives (Worthington et al., 2014, 2020). Contemporary scholarship further illustrates how the role continues to evolve beyond compliance and representation toward broader responsibilities involving organizational transformation, climate improvement, policy development, and accountability infrastructure (Bradley et al., 2022; Henderson, 2024). Collectively, this historical trajectory reflects a broader shift in higher education from viewing diversity as a regulatory obligation toward positioning equity and belonging as central components of institutional effectiveness and mission fulfillment. While the historical development of the CDO role reflects expanding institutional commitment to equity, contemporary scholarship reveals persistent structural tensions that complicate the effectiveness of these positions (Bradley et al., 2022; Williams & Wade-Golden, 2013).

Despite their expansion, research highlights persistent structural and organizational challenges that limit the effectiveness of CDOs. Studies indicate that the role is frequently marked by unclear authority, insufficient resources, and a lack of decision-making power relative to its symbolic visibility (Bradley et al., 2022; Leon, 2014; Stanley et al., 2019). The National Association of Diversity Officers in Higher Education (NADOHE, 2023) reported that nearly 88 percent of CDOs have held their current positions for fewer than five years, pointing to instability and high turnover within the field. Such data suggest that the prominence of the CDO role does not necessarily equate to institutional support, and turnover may disrupt continuity of DEIB strategy (Esparza et al., 2024; Pemberton & Kisamore, 2023; Ueda et al., 2024). The emerging pattern in the literature points to a paradox of rising visibility coupled with enduring structural constraints.

External political forces further complicate the organizational context in which CDOs operate. Recent state-level legislation has sought to restrict or dismantle DEIB offices, trainings, and programs in public colleges and universities (Alonso, 2024; PEN America, 2024). Alonso (2024) documented that six states enacted such laws in 2024, creating both legal and reputational challenges for institutions committed to equity. These external pressures interact with internal ambiguities, forcing CDOs to navigate contested political terrain while simultaneously advancing institutional diversity agendas (Gretzinger et al., 2025). The precariousness of the role is therefore not solely a matter of organizational design, but also a reflection of shifting societal and political currents that directly shape higher education. As a result, understanding the CDO role requires attention to both institutional structures and broader cultural contexts.

The combination of internal ambiguity and external hostility emphasizes the importance of examining the experiences of CDOs themselves. Scholars and practitioners increasingly recognize that data alone cannot capture how CDOs interpret, negotiate, and respond to the tensions inherent in their positions (Johnson, 2023; Nixon, 2017; Roman, 2022). By attending to these first-hand accounts, research can provide insight into how CDOs balance competing demands, advocate for resources, and navigate environments that may be resistant or hostile to their work. Such inquiry not only illuminates the practical realities of diversity leadership but also highlights the resilience and adaptive strategies of those occupying these roles (Johnson, 2023). Ultimately, focusing on the experiences of CDOs opens the door to a deeper understanding of the conditions under which they can succeed as transformative leaders rather than symbolic figures.

Therefore, this study sought to investigate how CDOs in higher education experience and make meaning of their roles within this complex landscape. While the creation of senior-level diversity positions may seem to signal institutional commitment, the alignment of authority, resources, and organizational placement with stated DEIB goals ultimately determines their effectiveness. By analyzing how structural, cultural, and political factors converge, this research contributes to the broader literature on higher education leadership and organizational change (Kezar & Eckel, 2002a; Macfarlane et al., 2024; Stanley et al., 2019; Zhao et al., 2024). In particular, it addresses a significant gap by centering the perspectives of those tasked with leading equity initiatives from within the highest levels of institutional governance. In doing so, the study not only advances scholarly understanding but also provides practical implications for institutions striving to embed DEIB into the fabric of academic life (Worthington et al., 2020).

Statement of the Problem

Although scholarship documents structural constraints on the Chief Diversity Officer (CDO) role in higher education, including ambiguous authority, limited resources, and unclear decision rights that can render DEIB structures symbolic rather than operative, the field still lacks a clear understanding of how CDOs make meaning of these conditions and how those interpretations shape day-to-day strategies. Existing work highlights dynamics such as legitimacy signaling and decoupling, in which institutions create formal roles that are weakly connected to core decision routines (Leon, 2014; Meyer & Rowan, 1977; Oliver, 1991; Williams & Wade-Golden, 2013). Research also details the psychosocial burdens and identity taxation that fall disproportionately on CDOs from marginalized groups (Gonzales et al., 2018; Gonzales & Núñez, 2014), as well as external political headwinds that have intensified since 2023 (Alonso, 2024; PEN America, 2024). What is missing is an actor-centered account that traces how CDOs interpret the intersection of organizational design, leadership culture, identity dynamics, and shifting political context, and how those interpretations inform the practical sequencing of actions, coalition building, and the use of evidence within their institutions. Accordingly, the problem addressed in this study is the lack of empirical understanding of CDOs’ meaning-making and strategy selection within structurally under-empowered, identity-laden, and politically volatile contexts. The problem aligns directly with the study's purpose and research questions by centering interpretation rather than assuming outcomes from structure alone. This focus motivated a basic interpretive qualitative design that prioritized CDOs' perspectives, attended to how they construe role conditions and leadership culture, and examined how those interpretations shape the strategies they report using. By illuminating the link between meaning and action, the study aimed to generate practical guidance for aligning authority, resources, and placement with the ways CDOs actually navigate their work.

Purpose and Scope

Purpose

Guided by a constructivist lens, the purpose of this basic interpretive qualitative study was to understand how Chief Diversity Officers (CDOs) in U.S. four-year higher education make meaning of their role conditions and how those interpretations inform the strategies they report using to navigate their work. The study focused on CDOs' perspectives on organizational design, leadership culture, and external pressures and attends to how CDOs describe connecting these understandings to their day-to-day decision making.

Scope

The scope of the study included current and recently serving (within the past five years) CDOs in U.S. higher education. This population was selected to capture both contemporaneous experiences and the reflective insights of those who have recently transitioned out of their roles, while ensuring that participants' perspectives remain closely tied to present-day institutional realities. The selection of participants encompassed both public and private U.S. four-year institutions across varying sizes and Carnegie classifications, recognizing that organizational context, sector, and mission all influence the scope and authority of DEIB leadership. This study was delimited to U.S. four-year institutions because the CDO role under examination is defined as a senior, institution-wide post situated within executive leadership (e.g., president/provost cabinets). That configuration is most consistently instantiated at four-year colleges and universities, where governance structures and academic operations create system-level levers for policy and culture change (Williams & Wade-Golden, 2013; Leon, 2014; Stanley et al., 2019). By including this diversity of institutions, the study sought to identify both common patterns and contextual variations in the ways CDOs experience organizational constraints and opportunities.

The study did not include diversity leaders in K–12 education, nonprofit organizations, or corporate settings. While CDOs in these environments face parallel challenges, their organizational structures, governance systems, and accountability measures differ significantly from those in higher education, making direct comparison beyond the scope of this inquiry. Similarly, while the study acknowledged the 2025 national political and policy climate surrounding DEIB efforts, it did not centrally analyze federal or state-level policy developments. Instead, attention remained on institutional structures and cultures as the primary units of analysis, with external political forces considered only insofar as they shape the CDOs' experiences and strategies. This focus allowed for a nuanced, higher education–specific account of the role and its organizational positioning.

Research Questions

- **RQ1.** How do Chief Diversity Officers in U.S. higher education make meaning of their role conditions, including organizational design and external pressures, as they experience their work within their institutions?
- **RQ2**. How do Chief Diversity Officers make sense of leadership culture in relation to their perceived influence and legitimacy, and how do these interpretations inform the strategies they report using?

Research Methodology

This study employed a basic interpretive qualitative design, guided by a constructivist epistemology. The focus of the basic interpretive approach was to understand how individuals make meaning of their experiences within particular contexts (Merriam & Tisdell, 2016). A constructivist orientation assumes that knowledge is co-constructed between researcher and participants and that meaning is socially and historically situated (Creswell & Poth, 2018). As such, this design was well-suited to the study's purpose of examining how CDOs in higher education interpret their authority, influence, and leadership effectiveness across varying institutional contexts.

Semi-structured interviews served as the method of data generation. This format provided a balance between structure and flexibility, allowing participants to respond in depth while ensuring that dialogue remains aligned with the study's research questions (Kvale & Brinkmann, 2015). The target was to include 8–12 current or recently serving (within the last five years) CDOs from U.S. colleges and universities. I purposefully selected participants to represent diversity across institutional type, size, and region, as well as across demographic identities, thereby enhancing the breadth of perspectives

(Patton, 2015). I analyzed transcripts using Braun and Clarke’s (2006) six-phase process of thematic analysis. This widely used analytic method supports the systematic identification and interpretation of patterns within qualitative data while allowing the researcher to co-construct themes inductively in relation to participants’ accounts. In this process, meaning is actively created through iterative engagement with the data, supported by researcher memoing and member checking to enhance reflexivity, credibility, and trustworthiness (Marshall et al., 2022; Saldaña, 2021).

I interpreted findings through the sensitizing concepts of institutional theory, transformational leadership, and intersectionality, which served as complementary theoretical frameworks and sensitizing concepts to explore how organizational structures, leadership practices, and social identities converge in shaping CDOs’ experiences. These frameworks were not used as prior coding categories; rather, they informed the discussion and interpretation of themes after they were generated inductively from participants’ accounts. This methodological approach provided a rigorous and contextually sensitive foundation for addressing the study’s research questions and contributes to the growing body of qualitative research on diversity leadership in higher education.

Significance of the Study

This study advances scholarship by centering the meaning-making of senior, institution-wide CDOs situated at the highest levels of campus governance. Prior research charted the rise of the role and its structural variants (Leon, 2014; Williams & Wade-Golden, 2013) and identified persistent tensions around legitimacy and workload (Gonzales et al., 2018; Gordon et al., 2024; Hirshfield & Joseph, 2012). What I found to be underdeveloped was an actor-centered account of how CDOs themselves interpret organizational design, leadership culture, and external pressures and how those interpretations shape what the role becomes in practice. Using a constructivist, basic interpretive design, this study contributes fine-grained, executive-level perspectives that deepen and complicate theory on institutional change and decoupling in higher education. In doing so, it directly addresses the gap noted in the introduction by bringing forward the perspectives of those tasked with leading DEIB work from within senior governance.

The study also carries practical significance for presidents, provosts, and governing boards responsible for designing and supporting the CDO role. Evidence shows that creating a CDO position does not, by itself, produce immediate improvement in outcomes such as faculty diversity, which underscores the importance of organizational design and authority structures (Bradley et al., 2022). By analyzing how CDOs make sense of authority, resources, and reporting lines, the findings inform concrete decisions about decision rights, budget, staffing, and placement that align with professional standards and field guidance (Worthington et al., 2020). Insights from CDOs' own accounts can help leaders diagnose misalignments that erode legitimacy and translate commitments into actionable changes to structures and processes. This practical focus equips institutions to move from symbolic adoption to durable capacity for equity work.

Finally, the study has field-level and workforce significance. National reports document high turnover and short tenures among CDOs, which threatens continuity and institutional memory (National Association of Diversity Officers in Higher Education, 2023). Research also links DEIB leadership to substantial emotional demands and burnout risks, particularly in contested climates (Esparza et al., 2024; Pemberton & Kisamore, 2023). By illuminating how CDOs interpret and navigate these conditions, the study offers evidence to guide professional development, role scoping, and supports that promote sustainability. In the context of ongoing legislative scrutiny of DEIB work, a deeper understanding of CDOs' meaning-making can also inform campus communication and policy advocacy in ways that are responsive to political constraints while maintaining institutional values (Alonso, 2024; PEN America, 2024). Collectively, the study contributes to scholarly debates, strengthens institutional decision-making, and supports the long-term viability of DEIB leadership in higher education.

Delimitations and Limitations of the Study

Delimitations

This study was delimited to senior, institution-wide Chief Diversity Officers (CDOs) serving at four-year higher education institutions in the United States. Four-year institutions most consistently locate the senior CDO on presidential or provost leadership teams, which supports conceptual coherence and cross-case comparability with a small qualitative sample. Two-year colleges are excluded because their missions, governance, and diversity leadership configurations differ in ways that would introduce variation beyond the study's analytic aims. Participants served at least one continuous year in the senior CDO role within the past five years. This criterion ensured exposure to a complete annual cycle of executive work, including planning, budgeting, evaluation, and governance, so participants can speak meaningfully to authority, resources, reporting lines, and institutional support. It also reduced reliance on accounts limited to onboarding or transitional periods (Dex, 1995; Hassan, 2005; Kvale & Brinkmann, 2015; Merriam &

Tisdell, 2016). By narrowing the focus to senior, institution-wide CDOs, the study intentionally excluded DEIB practitioners in K–12, nonprofit, corporate, or international settings, which aligned the population with the study's purpose of examining authority, influence, and institutional support within the distinctive structures of U.S. higher education.

The study was further delimited by its primary method of data generation: semi-structured interviews. This design choice is consistent with a basic interpretive, constructivist approach that privileges participants' perspectives and meaning-making. Additional data types, such as observations or extensive document analysis, were not included because the purpose was to elicit how senior CDOs interpret role conditions and describe the strategies they use, rather than to audit implementation processes. Finally, the inquiry was time-bounded to the period of data collection. Because CDO roles are shaped by evolving institutional and state policy environments, accounts reflected the political and organizational conditions present during the study window (Alonso, 2024; PEN America, 2024). These delimitations defined the scope of inference, ensured coherence between the research questions, methodology, and population, and positioned findings as contextually rich and transferable rather than statistically generalizable.

Limitations

The study had four practical limitations. First, because participation was voluntary, self-selection and nonresponse may have shaped whose perspectives are represented, a common constraint in purposeful, interview-based studies (Patton, 2015). Second, because participants were elite, high-visibility executives, some may have moderated their candor despite strong confidentiality protections, which is a known challenge in elite interviewing (Aberbach & Rockman, 2002). By *elite participants*, I refer to senior decision-makers with substantial formal authority and organizational visibility (Aberbach & Rockman, 2002). Third, findings were context- and time-bound. Therefore, interviews captured meaning-making within a particular institutional and policy climate, and shifts after data collection may have altered how leaders interpreted their roles (Lincoln & Guba, 1985). Finally, remote videoconference interviewing could have varied in audio or video quality; when connectivity limits visual cues, some nonverbal vocal cues that enrich interpretation may be reduced (Archibald et al., 2019).

Definitions

(Listed Alphabetically)

- *Challenges.* In the context of this study, challenges refer to the structural, cultural, and psychosocial barriers that impede the ability of Chief Diversity Officers (CDOs) to enact organizational change. These may include limited authority, inadequate resources, organizational resistance, tokenism, and external political pressures (Gonzales et al., 2018; Pemberton & Kisamore, 2023).
- *Chief Diversity Officer (CDO).* For this study, a Chief Diversity Officer is defined as the highest-ranking diversity, equity, inclusion, and belonging (DEIB) professional at a college or university, holding a cabinet-level or equivalent title with institution-wide responsibilities. While titles vary (e.g., Vice President for Diversity, Associate Provost for Inclusion), the CDO is distinguished by their charge to lead and coordinate DEIB strategy across the institution (Leon, 2014; Worthington et al., 2014).
- *Cultural Taxation.* Cultural taxation is the expectation that professionals from

marginalized groups will take on extra service, mentoring, diversity work, or community-liaison duties due to their identity, often without recognition or compensation (Padilla, 1994).

- *Diversity, Equity, Inclusion, and Belonging (DEIB).* DEIB is defined as the collective set of institutional practices and commitments aimed at creating equitable educational and workplace environments, reducing systemic barriers, and fostering belonging among historically marginalized populations (National Association of Diversity Officers in Higher Education [NADOHE], 2020; Worthington et al., 2014, 2020).
- *Emotional Labor.* Emotional labor involves the management of feelings and expressions to fulfill the emotional requirements of a role, often requiring the suppression or regulation of personal emotions to meet organizational expectations (Hochschild, 2012).
- *Identity Taxation.* Identity taxation refers to the additional representational, advisory, and emotional burdens placed on professionals from marginalized groups because of their identities—work that extends beyond formal role expectations. This usage builds on and extends Padilla's (1994) Cultural Taxation and is well documented by Hirshfield and Joseph (2012).
- *Inclusive Excellence.* Inclusive excellence is a campus-wide framework that integrates diversity, equity, and educational quality by embedding equity goals and accountability into core institutional functions – mission, curriculum, hiring, assessment, and resource allocation (Williams et al., 2005).
- *Institutional Support.* Institutional support refers to the structural, financial, and cultural resources provided by colleges and universities to sustain DEIB leadership.

This includes staffing, budgets, reporting lines, and organizational legitimacy granted to the CDO role (Bradley et al., 2022; Worthington et al., 2020).

- *Institutional Theory.* Institutional theory explains how organizational structures and practices are shaped by cultural norms, societal expectations, and legitimacy pressures. Institutions often adopt policies symbolically to signal compliance without enabling substantive change, a phenomenon known as "decoupling" (DiMaggio & Powell, 1983; Meyer & Rowan, 1977; Oliver, 1991).
- *Intersectionality.* Intersectionality refers to the framework for understanding how overlapping social identities (e.g., race, gender, class, sexuality) intersect to shape unique experiences of privilege and oppression. It highlights that inequalities cannot be fully understood by examining identities separately (Crenshaw, 1989).
- *Lived Experience.* Lived experience refers to the personal and professional perspectives of CDOs as shaped by their direct engagement with organizational structures, leadership contexts, and external environments. This term acknowledges the value of subjective interpretations and experiential knowledge in qualitative inquiry (Merriam & Tisdell, 2016).
- *Senior.* The term senior is used to designate a position or professional who serves at the executive level of an institution, typically as part of the president's cabinet or senior leadership team, regardless of whether the institution uses presidential, chancellor, or equivalent structures. Senior leaders are expected to influence institution-wide decision-making, strategy, and governance (Birnbaum, 1988; Williams & Wade-Golden, 2013).
- *Transformational Leadership.* Transformational leadership is a leadership strategy

that inspires followers to transcend self-interest, commit to shared visions, and enact meaningful organizational change. It emphasizes modeling, vision-sharing, empowerment, and collective purpose (Bass, 1990; Bass & Riggio, 2006).

Organization of the Study

This dissertation was organized into five chapters, each building toward a comprehensive understanding of the experience-grounded beliefs of the challenges faced by CDOs in higher education. Chapter 1 introduces the study by situating the CDO role within its historical, structural, and political context. It includes the background and introduction to the study, the statement of the problem, the purpose and scope of the research, a preview of the research methodology, the significance of the study, its limitations, and definitions of key terms. This chapter establishes the rationale for the study and frames the questions that guide the inquiry.

Chapter 2 provides the theoretical frameworks that inform the study, followed by a review of the literature most relevant to the research problem. The frameworks include institutional theory, transformational leadership, and intersectionality, which collectively shape the lens through which I will interpret the findings. The literature review then examines the evolution of DEIB leadership in higher education, organizational structures of the CDO role, challenges of emotional labor and identity taxation, external political pressures, and broader issues of institutional change. This chapter situates the study within existing scholarship and highlights the gap that this research seeks to address.

Chapter 3 describes the methodology of the study in detail. It explains the research design, the constructivist epistemological orientation, the population and sample, the procedures for data collection, and the six-phase thematic analysis approach used for data analysis. It also discusses the strategies employed to enhance trustworthiness, such as member checks, memoing, and reflexivity, as well as the ethical safeguards approved through the Institutional Review Board (IRB).

Chapter 4 presents the findings of the study. It reports the themes that I developed from the semi-structured interviews with CDOs, analyzing them in relation to the research questions and interpreting them through the theoretical frameworks established in Chapter Two. This chapter centers the voices of participants while demonstrating how their experiences align with or diverge from existing scholarship.

Chapter 5 discusses the findings and considers their implications for scholarship, institutional leadership, and practice. It integrates the results with the theoretical frameworks, reflects on the study's contributions, and provides recommendations for higher education leaders, policymakers, and professional associations. The chapter also identifies areas for future research to continue advancing the study of DEIB leadership in higher education.

Together, these chapters provide a coherent and rigorous exploration of how CDOs make meaning of their authority, influence, and institutional support, offering insights that are both scholarly and practical for advancing inclusive excellence in higher education.

Chapter II

Theoretical Frameworks and Review of the Literature

Introduction

The purpose of this chapter is to establish the conceptual grounding and scholarly context for the study. First, I outlined the theoretical frameworks that guide interpretation in later chapters, which are institutional theory, transformational leadership, and intersectionality. I then synthesized the research literature on diversity leadership in higher education, organizing the review around six themes that speak directly to the problem articulated in Chapter One. This structure provides a bridge from the study's rationale to the evidence base that informs the research questions and methods.

The role of Chief Diversity Officers (CDOs) in higher education has expanded over the past two decades. By 2016, roughly two-thirds of major U.S. universities had established an executive-level CDO (Bradley et al., 2022; Williams & Wade-Golden, 2013). However, despite growing visibility, disparities in authority, influence, and institutional support compared with other cabinet-level leaders persist (Esparza et al., 2024; Williams & Wade-Golden, 2013). Institutional factors such as ambiguous role expectations, limited access to decision-making structures, resource constraints, and racialized scrutiny, particularly for CDOs of color, compound these challenges (Koffi, 2024; Nixon, 2017). While charged with leading institutional change, many CDOs describe operating symbolically without the structural power necessary to enact transformation (Ahmed, 2012; Esparza et al., 2024). Attending to these challenges is not only descriptive. It also surfaces the conditions that CDOs must interpret as they work and the cues they use to evaluate options. Framing the literature in this way connects what is known about constraints and supports to the core focus of this study: how CDOs make sense of their roles and how those interpretations shape day-to-day strategies.

This chapter synthesizes the existing literature related to DEIB leadership in higher education, focusing on six key themes: (1) challenges in measuring DEIB success, (2) the evolving role and development of CDOs, (3) their influence on workforce and faculty diversity, (4) organizational resistance to DEIB initiatives, (5) systemic barriers that limit structural impact, and (6) identity-based burdens that uniquely shape CDO experiences. By examining these intersecting topics, the review builds a deeper understanding of the institutional, relational, and identity-based dynamics that shape the work and impact of CDOs (Gonzales et al., 2018; Leon, 2014). Collectively, these themes illuminate mechanisms of structural under-empowerment, including misaligned authority, resources, and placement, while showing how leadership culture, identity taxation, and external political pressures interact (Koffi, 2024; Ueda et al., 2024). This directly addresses the problem outlined in Chapter One and sets up the study's constructivist focus on how CDOs make meaning of these conditions in their day-to-day work.

To orient the review toward the study's aims, the chapter concludes by returning to the guiding research questions:

- **RQ1.** How do Chief Diversity Officers in U.S. higher education make meaning of their role conditions, including organizational design and external pressures, as they experience their work within their institutions?
- **RQ2.** How do Chief Diversity Officers make sense of leadership culture in relation to

their perceived influence and legitimacy, and how do these interpretations inform the strategies they report using?

Theoretical Frameworks

This study was informed by three theoretical frameworks – institutional theory, transformational leadership, and intersectionality – that served as sensitizing concepts to guide interpretation after coding rather than to determine coding. Together, they offered complementary lenses for examining tensions between symbolic inclusion and substantive change in CDOs' leadership experiences. They clarified how structural positioning, leadership practices, and intersecting social identities shape perceived authority, influence, and effectiveness (Bass, 1985, 1990; Crenshaw, 1989; Meyer & Rowan, 1977). Each contributed a distinct orientation: institutional theory illuminates organizational structures and legitimacy (Scott, 2014); transformational leadership highlights how leaders articulate vision and mobilize cultural change (Bass, 1985, 1990); and intersectionality surfaces compounded effects of identity-based marginalization (Nixon, 2017). Using these sensitizing concepts supported a nuanced reading of how CDOs construct meaning around their roles, navigate institutional resistance, and lead change in complex organizational environments.

Institutional Theory

Institutional theory, as articulated by sociologists John Meyer and Brian Rowan (1977), examines how organizations adopt formal structures, roles, and practices in response to societal expectations and norms rather than internal efficiency or effectiveness. A key concept within this theory is "decoupling," or the idea that organizations may implement policies or create positions, such as that of the CDO, to maintain legitimacy with external stakeholders while failing to embed those roles with real authority or influence. In this way, CDOs may hold executive titles and sit on presidential cabinets but remain excluded from core decision-making processes, rendering their work symbolic rather than strategic (Gonzales et al., 2018).

Scott (2014) expanded institutional theory by identifying three pillars of institutions: regulative, normative, and cultural-cognitive, which shape how power and legitimacy are constructed and sustained. These dimensions are useful for analyzing the disconnect between espoused DEIB values and the operational realities CDOs confront. This theory offers a powerful critique of how higher education institutions often co-opt the language and structures of inclusion without making substantive organizational change. In this study, institutional theory helped explain how formal authority, structural legitimacy, and symbolic performativity intersect to constrain or enable the leadership capacity of CDOs. It informed RQ1 by sensitizing the analysis to how organizational design and external legitimacy pressures shape role conditions, and it informed RQ2 by clarifying how legitimacy and decoupling influence CDOs' perceived authority and influence.

Transformational Leadership Theory

First developed by James MacGregor Burns (1978) and later expanded by Bernard Bass (1985), transformational leadership describes a leadership approach grounded in vision, moral purpose, and the capacity to inspire change in individuals and organizations. Bass identified four components: idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration. These components foster trust, innovation, and shared purpose, all of which are essential for advancing DEIB efforts in resistant or ambivalent institutions (Bass, 1985; Northouse, 2022). CDOs often operate in volatile and politically charged environments where they must lead change without full executive buy-in. In such settings, transformational leadership becomes not only aspirational but necessary: CDOs model resilience, engage stakeholders across campus, and craft inclusive visions that appeal to both head and heart while navigating cultural inertia and resource constraints (Astin & Astin, 2000; Northouse, 2022). This framework primarily informed RQ2 by orienting the analysis to how leadership culture shapes perceived influence and legitimacy and to the strategies CDOs report using. It also supported RQ1 insofar as leaders' meaning-making of role conditions can enable or constrain transformational behaviors.

Intersectionality

Intersectionality, a term coined by Kimberlé Crenshaw (1989), is a critical framework that examines how overlapping social identities such as race, gender, class, and sexuality interact to produce distinct experiences of oppression and privilege. Originally developed to address the marginalization of Black women within legal and feminist discourses, intersectionality now serves as an essential tool for analyzing the multidimensional nature of power and identity in institutional contexts (Crenshaw, 1989).

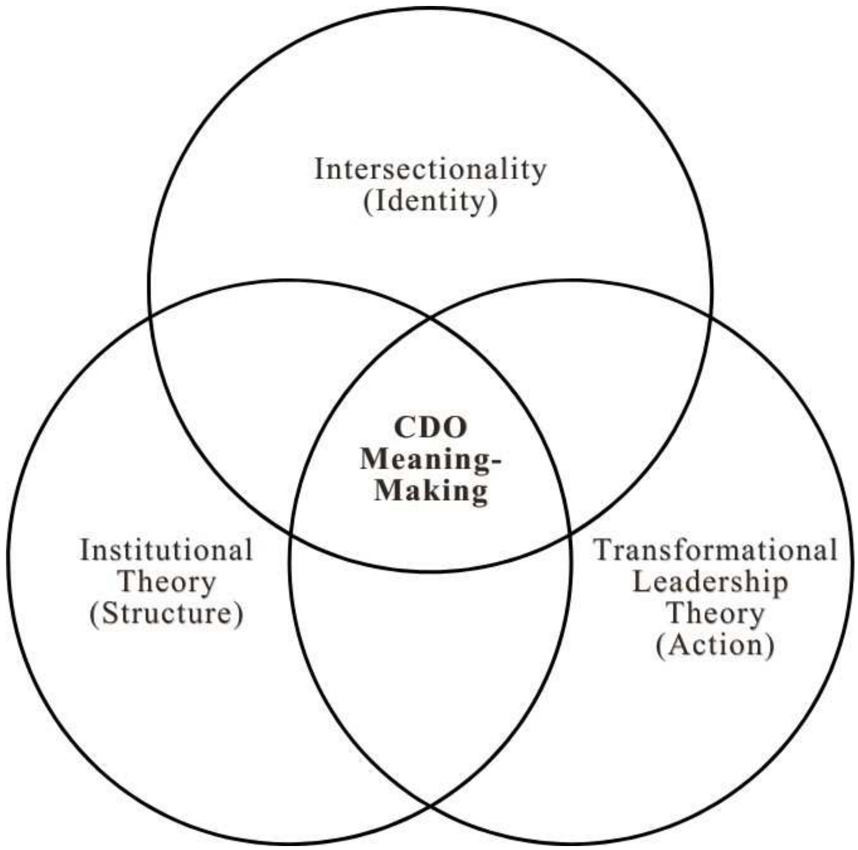
For CDOs, particularly those who are people of color, women, LGBTQ+, or hold other minoritized identities, intersectionality illuminates how social position shapes how they are perceived, supported, and scrutinized in their roles. These leaders may be expected to personify the very diversity they are tasked with advancing while encountering hypervisibility, institutional skepticism, and racialized expectations (Koffi, 2024; Nixon, 2017). Intersectionality is not only descriptive but also analytical because it shows how identity dynamics intersect with organizational structures to shape leadership legitimacy and emotional labor.

Wingfield (2019) argued that intersectionality offers a powerful lens for understanding how Black professionals are at once celebrated and constrained through institutional norms and performance expectations. In this study, intersectionality primarily informed RQ2 by focusing attention on how leadership culture interacts with social identity to shape perceived influence, legitimacy, and the strategies CDOs report using. It also supported RQ1 by highlighting how identity can condition the meaning CDOs make of role conditions such as authority, resources, reporting lines, and external pressures.

To visually illustrate how the three theoretical lenses guiding this study relate to one another, Figure 1 presents a diagram showing the intersection of institutional theory (structure), transformational leadership theory (action), and intersectionality (identity). The figure highlights how these perspectives collectively frame the meaning-making environment within which chief diversity officers interpret role conditions, navigate institutional pressures, and enact leadership strategies.

Figure 1

Visual model illustrating the intersection of institutional theory (structure), transformational leadership theory (action), and intersectionality (identity) as lenses for interpreting chief diversity officers' leadership experiences



Topical Literature Review

Overview and Approach

As outlined in the chapter introduction, the growth of senior-level diversity leadership in higher education has unfolded alongside persistent questions about authority, influence, and institutional support. Building on that framing, this section synthesizes the empirical and conceptual scholarship most relevant to how CDOs encounter, interpret, and respond to their organizational environments. Consistent with the study's interpretive focus, this synthesis treats documented challenges and supports as the conditions leaders must read and make sense of in real time. Where prior work reports outcomes or describes barriers, the analysis foregrounds how CDOs interpret those contexts, what cues they use to judge legitimacy and influence, and how those interpretations plausibly shape strategy. Framing the literature this way links descriptive findings to the study's core questions about meaning-making and day-to-day decision-making.

The review is organized into six themes that map directly onto the study's core constructs. Themes one through three address how the field defines and evaluates progress, how the CDO role has evolved, and what is known about links between CDO structures and workforce or faculty outcomes, which together illuminate role conditions and expectations. Themes four through six examine organizational resistance, systemic barriers, and identity-based burdens, which together surface leadership culture, external pressures, and the lived dynamics that shape perceived legitimacy and strategy selection. Across themes, attention is given to where findings converge, where they diverge, and where gaps remain that motivate the present study.

Throughout, cross-references to the chapter introduction are used sparingly to avoid repetition while keeping the throughline clear. Evidence is synthesized to clarify how existing scholarship informs RQ1 on meaning-making about organizational design and external pressures, and RQ2 on how leadership culture relates to perceived influence, legitimacy, and the strategies CDOs report using. The aim is to provide a concise, decision-relevant evidence base that anchors the study's methods and prepares the ground for interpreting findings within established debates.

Theme One. Challenges in Measuring DEIB Success

Lack of Standardized DEIB Metrics. A central challenge faced by CDOs in DEIB initiatives is the lack of standardized DEIB metrics. Unlike areas such as enrollment management or academic performance, DEIB work lacks universally accepted benchmarks, making it difficult to assess whether interventions yield symbolic change or systemic transformation (Ahmed, 2012; Worthington et al., 2014). Institutions often default to surface-level indicators like attendance at events or demographic shifts, rather than measuring progress in equity-minded policy reform or climate enhancement (Worthington et al., 2014). Without consistency in data collection, institutional definitions of diversity, and accountability structures, CDOs are frequently required to design original metrics or adapt existing tools from business or student affairs (Harris & Bensimon, 2007). This lack of infrastructure leads to performative reporting (critiqued for privileging optics over durable change), undermining the ability to assess the effectiveness of strategic DEIB efforts (Ahmed, 2012; Williams & Wade-Golden, 2013). Though organizations like the American Association of Colleges and Universities (AAC&U) and the National Association of Diversity Officers in Higher Education (NADOHE) have offered frameworks for evaluation, adoption remains inconsistent, leading to fragmented accountability across the sector (Clayton-Pedersen et al., 2007; National Association of Diversity Officers in Higher Education [NADOHE], 2020). Without clear indicators, institutions often default to superficial or performative measures, such as tracking attendance at events or the frequency of DEIB-related trainings, rather than evaluating meaningful cultural change or equity outcomes (Ahmed, 2012). To avoid repeating points below, subsequent references to performativity draw on the critique already attributed to Ahmed (2012).

Difficulties in Tracking Long-Term DEIB Outcomes. Long-term DEIB success is often elusive due to inconsistent leadership commitment and the gradual nature of culture change, which complicate assessment over time (Chun & Feagin, 2021; Kezar & Eckel, 2002b). Many institutions also lack the infrastructure for disaggregated, longitudinal equity data, and few have embedded equity metrics into strategic planning cycles (Clayton-Pedersen et al., 2007; Harris & Bensimon, 2007). Frequent turnover among senior leaders further disrupts continuity and momentum, contributing to fragmented or reactive DEIB implementation (Chun & Feagin, 2021; Kezar & Eckel, 2002a). Chun and Feagin (2021) argued that many institutions lack the structural frameworks and tools necessary for tracking DEIB progress over time. Without such tools, institutions struggle to determine which practices foster inclusive excellence or which merely check the box. Sweet (2023) further emphasized pressure to demonstrate rapid, visible outcomes despite the reality that meaningful cultural change is iterative and requires sustained engagement. As a result, CDOs are often tasked with demonstrating impact within truncated timelines that do not reflect the long-term nature of systemic transformation (Bensimon, 2005; Harper & Hurtado, 2007). These time-horizon challenges connect back to the nonstandard metrics above and foreshadow tensions around what "counts" as evidence in the next subsection.

Tensions Between Qualitative Metrics and Quantitative Impact. Institutions frequently prioritize numerical indicators, such as demographic representation, event attendance, and training completions, to assess DEIB success (Bensimon, 2005; Williams & Wade-Golden, 2013). While these metrics provide accessible forms of measurement, they often fail to capture the complexity of campus climate, the quality of interpersonal experiences, or the depth of institutional transformation (McNair et al., 2020). Such quantitative indicators can foster a false sense of progress, especially when used without complementary qualitative data or long-term assessments (Gasman et al., 2011). Ahmed (2012) argued that what is considered diversity is often shaped by what can be easily counted, which can narrow DEIB agendas. This reductionist lens risks ignoring systemic inequities, microaggressions, and cultural barriers that shape daily experiences for minoritized groups.

McNair et al. (2020) cautioned that when institutions rely too heavily on quantitative metrics, they risk fostering a superficial culture of compliance that prioritizes short-term impressions over meaningful, long-term equity progress (Gasman et al., 2011). When numerical benchmarks are the primary or singular means of evaluation, institutions may miss indicators of psychological safety, trust, or belonging, which are harder to quantify but essential for sustainable change (Rankin & Reason, 2005). Spence (2019) also warned that when institutions favor easily digestible numbers over nuanced judgment, leadership accountability can suffer because complex progress is reduced to oversimplified measures. These tensions emphasize the need for integrative, mixed-methods approaches to DEIB assessment (Soicher et al., 2024). Thus, both the absence of shared standards and the preference for countable indicators shape the evidence CDOs can marshal.

Pressure to Perform vs Room to Innovate. CDOs often enter roles under high pressure to produce immediate results, sometimes driven by institutional responses to external crises, legal pressures, or reputational concerns following public incidents (Washington, 2019). As a result, CDOs are expected to rapidly demonstrate progress by launching initiatives, increasing visibility, and enhancing diversity metrics without the structural support or authority to enact systemic change (Weissman, 2025). This pressure can lead to an overreliance on short-term, performative strategies rather than long-term cultural transformation (Weissman, 2025) (see performativity critique noted above).

Moreover, the urgency to “perform” can limit innovation. Rather than being empowered to disrupt entrenched norms or experiment with equity-centered solutions, many CDOs find themselves navigating institutional politics and appeasing multiple stakeholders with conflicting priorities (Pemberton & Kisamore, 2023). This environment prioritizes risk mitigation over creativity, leaving little room to trial new frameworks or build sustainable equity infrastructure (Mor Barak et al., 2016). Such constraints can foster frustration and burnout among CDOs and undermine the broader DEIB mission (National Center for Institutional Diversity [NCID], 2025). The performance imperative interacts with the measurement problems above, reinforcing short timeframes and narrow indicators.

Benchmarking Across Peer Institutions. CDOs are often evaluated by institutional leaders through comparisons to DEIB efforts at peer or aspirational institutions (Williams & Wade-Golden, 2013). While benchmarking can offer useful insights, it can also create pressure to replicate externally visible programs without considering institutional context (Hayes et al., 2021). This comparative approach can inadvertently reward superficial visibility over substantive impact, especially when institutions prioritize easily marketable initiatives instead of culturally embedded change (Ahmed, 2012; Stewart, 2020; Williams & Wade-Golden, 2013). In addition, the lack of standardized DEIB success metrics across higher education makes benchmarking a precarious task (Worthington, 2012). What one institution defines as "best practice" may be culturally incompatible with another, given diverse missions, resources, and student populations (Caeiro et al., 2020; Diversio, 2022; Williams & Wade-Golden, 2013).

Scholars argued that benchmarking is most effective when it moves beyond surface-level imitation and instead promotes cross-institutional learning grounded in authentic assessment and transparency (Eagan et al., 2015; Williams & Wade-Golden, 2013). This requires institutions to both learn from peers and critically assess their unique DEIB landscape, resource constraints, and readiness for change (McNair et al., 2020; Williams & Wade-Golden, 2013). In short, effective benchmarking depends on the very clarity of goals, data, and context that is often missing in DEIB measurement, linking this subsection back to the opening problem of nonstandard metrics.

Theme Summary. Measurement gaps, inconsistent time horizons, and a preference for easily counted indicators make it difficult to separate symbolic activity from structural change. Institutions often emphasize visible metrics such as headcounts and trainings, while climate, belonging, and practice change remain under-measured, which can foster a procedural, compliance-driven approach to equity work. Benchmarking without shared standards increases performativity and obscures local context. Institutional theory explains how these patterns maintain legitimacy while decoupling DEIB talk from core routines. Transformational leadership clarifies how CDOs use vision framing and mixed-method evidence to center meaning rather than mere metrics, and intersectionality reminds us that lived experience data are necessary to capture equity effects across identities.

Theme Two. Evolving Role and Development of CDOs

Expansion of the CDO Role and Scope. Once viewed as advisory or symbolic, the CDO role has expanded significantly over the past two decades. Many CDOs now hold senior titles, serve on presidential cabinets, and are expected to lead campus-wide cultural transformation (Williams & Wade-Golden, 2013). Yet this growth in scope has not always been matched by changes in authority or structural support. Gonzales et al. (2021) described the paradox of institutional performativity, where the presence of a CDO fulfills a symbolic function without necessarily signaling genuine commitment to DEIB change. CDOs are frequently expected to take on expansive portfolios without commensurate staffing or resources, all while being charged with leading initiatives across institutional units but lacking access to key strategic decision-making channels (Wells, 2021).

The elevation of the CDO has reconfigured power vertically and horizontally: vertically, cabinet placement can increase visibility but, without aligned decision rights, leaves budget, policy, and personnel levers concentrated in provost, finance, and HR offices; horizontally, the role is asked to coordinate across academic and administrative silos without formal line authority, producing a matrixed mandate that depends on persuasion rather than control (Scott, 2014; Williams & Wade-Golden, 2013). In institutional-theory terms, this expansion often signals legitimacy to external audiences while remaining decoupled from core governance routines when reporting lines, budget discretion, or policy authority are not adjusted (Meyer & Rowan, 1977; Scott, 2014). Simultaneously, expectations for DEIB outcomes have intensified: presidents and boards increasingly anticipate visible gains in recruitment and retention, climate improvement, and risk/reputation management on compressed timelines, which shifts accountability to the CDO even when enabling structures remain unchanged (Bradley et al., 2022; Washington, 2019; Williams & Wade-Golden, 2013). Under these conditions, transformational leadership capacities (e.g., vision framing, coalition building, and influence without authority) become necessary mechanisms for progress but cannot substitute for missing decision rights or resources (Bass, 1990; Williams & Wade-Golden, 2013).

Structural Ambiguity and Reporting Misalignment. Another persistent issue is the ambiguity in reporting structures and institutional alignment. Some CDOs report directly to the president, while others are nested within student affairs, human resources, or academic affairs, which affects both visibility and influence (Melton et al., 2024; Williams & Wade-Golden, 2013). Misaligned reporting relationships can lead to role confusion and limit a CDO's ability to effect change at the institutional level (Williams & Wade-Golden, 2013). Moreover, the lack of clear job descriptions or unified expectations across institutions further complicates the professionalization of the role (Parker, 2019). Institutional theory predicts variability in structures as organizations seek legitimacy in different fields; unclear placement sustains decoupling from decision rights. Where alignment is strong, transformational leadership is more likely to translate into perceived influence and legitimacy because leaders can model, communicate, and reinforce shared priorities across units (Bass, 1990; Scott, 2014). Ambiguous placement thus functions as a structural constraint consistent with decoupling (Meyer & Rowan, 1977), whereas direct cabinet alignment creates the conditions in which transformational leadership behaviors can convert vision into cross-unit action (Bass, 1990).

The Need for Ongoing Professional Development. Given the dynamic and contested nature of DEIB work, scholars have emphasized the need for CDOs to receive continuous professional learning opportunities. Executive mentoring and coaching models have been highlighted as critical for newly appointed senior diversity officers, helping them navigate leadership complexities and institutional demands (Mobley & Stanley, 2020). Similarly, external communities of practice and peer support networks provide essential professional connections and guidance, especially in the face of role isolation (National Center for Institutional Diversity [NCID], 2025). Professional development strengthens the transformational leadership capacities (idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration) needed to mobilize change when structures are ambiguous, while also building institutional savvy to navigate norms and legitimacy pressures (Bass, 1985, 1990; Scott, 2014). Targeted coaching and peer learning operate as mechanisms that convert symbolic role expansion into practiced authority by increasing cross-unit influence and reducing decoupling in day-to-day routines (Bass, 1990; Meyer & Rowan, 1977; Scott, 2014). Further, when development is identity-responsive, it also mitigates identity taxation and sustains leader efficacy in contested climates (Koffi, 2024; Nixon, 2017).

Mentorship and Sponsorship Gaps. Despite the increased prominence of CDOs in higher education, many lack access to intentional mentorship and sponsorship structures, which are vital for professional growth and retention (Ibarra et al., 2010;

Mobley & Stanley, 2020). Unlike their peers in academic affairs or advancement, CDOs often work in relative isolation, with few internal advocates who understand the scope and strategic significance of their work (Williams & Wade-Golden, 2013). This isolation can hinder both professional advancement and influence, especially in environments where DEIB is still viewed as peripheral to institutional success (Williams & Wade-Golden, 2013).

Mentorship and sponsorship differ in critical ways. Mentors offer guidance, while sponsors actively advocate for career advancement (Ibarra et al., 2010). For CDOs, the latter is often lacking, particularly at predominantly white institutions where senior leaders may not fully grasp or value the strategic dimension of DEIB (Koffi, 2024). Consequently, many CDOs lack the institutional support necessary to navigate complex political dynamics, secure necessary resources, and remain in their roles long-term (Esparza et al., 2024). Moreover, because the CDO role is relatively new compared to other senior administrative positions, there is limited precedent for structured onboarding or succession planning (White, 2023). This makes mentorship and sponsorship even more important for knowledge transfer and professional stability (National Association of Diversity Officers in Higher Education [NADOHE], 2020). Sponsorship can convert symbolic support into institutional authority by brokering access to decision venues, and it enables transformational behaviors to gain traction beyond the CDO's office (Bass, 1990; Scott, 2014). Where sponsorship is absent, the CDO's role remains structurally decoupled from resource and policy levers, making influence contingent on persuasion rather than authority (Meyer & Rowan, 1977; Scott, 2014).

Onboarding and Role Clarity for CDOs. The success of CDOs is heavily influenced by how well their roles are defined and integrated within institutional structures from the outset (Washington, 2019; Williams & Wade-Golden, 2013). Unfortunately, many CDOs enter their roles with ambiguous job descriptions, unclear reporting lines, and misaligned expectations from different campus constituencies (Washington, 2019; Williams & Wade-Golden, 2013). Such ambiguity compromises their ability to build coalitions, advocate for resources, and implement systemic change (Gonzales et al., 2021).

Onboarding practices vary widely across institutions, and some CDOs receive little to no structured support during their transition into the role (Mosquera & Soares, 2025; Washington, 2019). This absence of a formal onboarding plan, combined with strained expectations, professional isolation, and the novelty of the role, can lead to higher rates of turnover or early burnout for CDOs (NCID, 2025). Further complicating the picture is that CDOs are often recruited to "fix" an institution's DEIB problems without first conducting institutional readiness assessments or building shared ownership for the work (Breen et al., 2025; Gonzales et al., 2021). In this context, clarity of role, executive-level sponsorship, and early onboarding investments have been shown to facilitate successful leadership transitions and long-term effectiveness (Azour & McGuiness, 2023; Cable et al., 2013). Clear charters and reporting lines reduce decoupling by aligning formal structures with authority, and strong onboarding equips CDOs to enact transformational change through early trust-building and vision articulation (Bass, 1990; Meyer & Rowan, 1977).

Communities of Practice and External Peer Networks. Given the underdeveloped internal infrastructures for DEIB leadership at many institutions, CDOs often rely on external communities of practice and peer networks to develop skills, exchange strategies, and manage role-based challenges (Hakkola et al., 2021). These communities create spaces for critical reflection, benchmarking, and innovation, often becoming the primary source of professional support for CDOs (Wenger et al., 2002). Participation in national networks, such as the National Association of Diversity Officers in Higher Education (NADOHE), or regional alliances provides access to research-based resources and policy briefings that are not always available internally (Esparza et al., 2024). Such networks can also help CDOs remain abreast of legal shifts, federal compliance expectations, and promising practices in inclusive leadership. Moreover, these external peer connections help to combat the professional isolation many CDOs report (NCID, 2025). They also serve as informal mentorship spaces, particularly when institutional mentorship is lacking or when the political environment on campus makes internal support untenable (James-McAlpine et al., 2023). Communities of practice cultivate transformational capacities (shared language, problem framing, and diffusion of practice) while providing institutional field-level legitimacy that CDOs can leverage locally (Scott, 2014; Wenger et al., 2002).

Preparation Pathways: Academic vs Corporate CDO Pipelines. There is increasing diversity in the professional pathways that lead individuals to CDO roles in higher education (Worthington et al., 2020). Some CDOs ascend from academic units, bringing scholarly expertise and a deep understanding of campus governance (Wilson, 2013). Others transition from corporate or nonprofit DEIB leadership roles, offering skills in change management, strategy implementation, and metrics-driven accountability (Barbosa, 2024). While both pathways bring strengths, there are also tensions and gaps in preparation. Academic-based CDOs may need to strengthen competencies in executive management or organizational development (Stanley et al., 2019). Conversely, CDOs transplanted from corporate environments may face challenges navigating the decentralized, shared governance culture of higher education, where managerial models often conflict with collegial decision-making norms (Kezar & Eckel, 2004).

Furthermore, because the CDO role is often newly crafted at each institution, there is little standardization in terms of core competencies or credentialing (Williams & Wade-Golden, 2013). These disparate pipelines highlight the necessity for institutions to approach CDO hiring with intentionality, focusing on mission-aligned competencies, and to continue investing in leadership development post-hire (Arnold & Kowalski-Braun, 2012; Williams & Wade-Golden, 2013). Pathway fit shapes whether transformational skill sets align with local governance logics; hiring for institutional alignment reduces the risk of symbolic placement and increases the likelihood that structure and strategy reinforce one another (Bass, 1990; Kezar & Eckel, 2004). Overall, the evolution and professionalization of the CDO role have raised expectations without consistently reforming structures. This mismatch helps explain why measurement, authority, and legitimacy remain contested and sets up the next theme on organizational resistance and barriers.

Theme Summary. The CDO role has expanded in title and scope faster than its decision rights, creating vertical power mismatches, such as cabinet visibility without budget or policy levers, and horizontal power mismatches, such as cross-silo mandates without line authority. Ambiguous reporting lines, uneven onboarding, and weak sponsorship can leave the role symbolically central but operationally peripheral.

Professional development, mentorship, and communities of practice build the skills and social capital needed to lead across silos, yet durable impact still requires aligned structures. Institutional theory situates this expansion as a legitimacy move that risks decoupling when authority, budget, and governance access lag. Transformational leadership highlights how CDOs translate vision into coalitions and routines, and intersectionality underscores how identity shapes credibility, scrutiny, and support.

Theme Three. CDO Effectiveness in Workforce Impact

CDOs' Influence on Hiring Outcomes. A growing body of evidence emphasizes that CDOs without policy-making authority often struggle to influence hiring outcomes. Bradley et al. (2022) found no significant effect of CDO appointments on faculty diversity, even within four years. Further, interviews and case studies reveal that CDOs are frequently introduced late in hiring processes or deployed with symbolic rather than operational power, forcing them to rely on informal strategies such as moral persuasion or crisis management (NCID, n.d.). Survey data from NADOHE (2023) further confirmed that CDOs often operate with limited resources, authority, and staffing, increasing the importance of supportive culture and executive leadership for meaningful impact. In institutional theory terms, this pattern reflects decoupling because formal roles exist but are not integrated into decision rights. Also, transformational leadership capacities become the compensatory pathway for influence when authority is thin (Bass, 1990; Meyer & Rowan, 1977).

Differences in DEIB Impact Across Industries. Comparative studies suggest that DEIB leadership roles are more strategically aligned and clearly defined in corporate contexts, where centralized governance ensures integration into organizational objectives.

Dotan et al. (2024) highlighted the challenges posed by private-sector, top-down governance when applied to higher education's collaborative faculty governance model. In contrast, higher education institutions often struggle to integrate DEIB into strategic frameworks due to decentralized governance, faculty autonomy, and a resistance to change rooted in tradition (Kezar & Eckel, 2004). The sector contrast illuminates how field logics and governance structures distribute power; higher education's decentralization increases the risk of decoupling, requiring CDOs to mobilize transformational influence across units rather than rely on centralized authority (Bass, 1990; Scott, 2014).

Limited Formal Leadership Training for CDOs. Survey data indicate that many CDOs emerge from academic or student affairs backgrounds without formal executive leadership training, which is a development gap that can limit their influence at the cabinet level (NADOHE, 2023). As Williams and Wade-Golden (2013) observe, inconsistent preparation and undefined pathways make managing institutional change even more challenging. NCID (2025) confirmed that new CDOs often lack mentorship, formal onboarding, and strategic support, which undermines their capacity to build influence. Higher education leadership remains entangled in complex governance structures, a reality reflected in the tripartite leadership perspectives offered by Macfarlane et al. (2024), which emphasize the necessity for pragmatic leadership competencies in navigating institutional hierarchies and facilitating change. Targeted development strengthens transformational competencies needed to lead across silos and builds institutional savvy to work within legitimacy norms and reduce decoupling in hiring routines (Bass, 1990; Scott, 2014).

Intersection of DEIB and Shared Governance in Hiring. Bradley et al. (2022) explicitly noted that in university shared governance contexts, CDOs have limited influence over faculty hiring decisions, emphasizing how diffuse decision-making structures complicate. Because faculty maintain significant autonomy over academic hiring decisions, institutional DEIB priorities may be diluted or inconsistently applied during search processes (Bradley et al., 2022). CDOs and DEIB leaders may not have formal authority within governance structures, leading to disconnects between institutional equity goals and the implementation of search practices (NADOHE, 2023). As Bradley et al. (2022) argued, a lack of alignment between institutional leadership and faculty governing bodies frequently stalls progress in building diverse and inclusive academic workforces. Strengthening DEIB outcomes thus requires reimagining governance models to promote equitable participation and integrate DEIB perspectives more fully into hiring and retention strategies (Violaris, 2024). Misalignment between executive priorities and faculty autonomy is a classic locus of decoupling; governance redesign and coalition-building are transformational levers for reconciling values, norms, and practices (Bass, 1990; Meyer & Rowan, 1977).

Equity-Minded Search Committees and Hiring Toolkits. Equity-minded frameworks offer essential guidance for transforming faculty hiring toward greater fairness and inclusion (O'Meara & Templeton, 2022). Institutions are increasingly embracing structured DEIB tools, such as standardized evaluation rubrics, inclusive hiring checklists, and clear committee guidelines to mitigate bias and align search practices with equity goals (University of Maryland, 2023). Empirical research also shows that training search committee members to actively identify and disrupt exclusionary practices contributes to more equitable hiring outcomes (Liera & Desir, 2023). However, these tools and trainings often fall short of systemic adoption and risk being perceived as mere compliance rather than embedded cultural shifts. Tools without authority or culture change can reproduce decoupling; transformational practices (shared vision, modeling, and reinforcement) help normalize equity-minded routines beyond compliance (Bass, 1990; Scott, 2014).

Challenges of Faculty Diversification in Tenure-Track Roles. Diversifying tenure-track faculty remains a persistent challenge in higher education, with progress often concentrated in non-tenure-track roles rather than permanent lines (Finkelstein et al., 2016, as cited in Griffin, 2020). Underrepresented scholars continue to confront systemic barriers, including narrow notions of merit, preference for elite credentials, and exclusionary informal networks that impede entry and advancement (Griffin, 2020). Moreover, retention is a significant concern: faculty of color frequently experience isolation, disproportionate invisible labor, and lack of mentorship, which are factors contributing to departure (Truong, 2021). Improving tenure-track representation requires a coordinated, institution-level strategy that extends beyond the pipeline to include equity-minded recruitment and hiring practices, transparent and fair promotion and tenure processes, and intentional structures that support retention and workplace climate for scholars of color (Griffin, 2020). Tenure-line bottlenecks reveal where institutional norms of merit police boundaries; transformational leadership can broaden evaluative criteria and build coalitions for policy change, but structural levers must also be aligned to prevent decoupling in promotion and tenure practices (Bass, 1990; Scott, 2014).

Role of Data in Influencing Workforce Diversity Decisions. Data-driven leadership is critical for advancing DEIB priorities, as institutional leaders increasingly rely on analytics to shape inclusive strategies (Chigbu & Makapela, 2025). Disaggregated metrics by race, gender, rank, and contract type enable the identification of structural inequities and inform targeted interventions (Dashield, 2022). Tools like DEIB dashboards, audits, and climate surveys transform data into advocacy instruments that underpin structural revisions in hiring, compensation, and promotion (University of Miami, Center for Institutional Research & Insight Services (2021). Nonetheless, data alone cannot drive institutional change; having the political will to act on inequities is essential for translating insight into transformation (Belafi, 2022). Data infrastructure can close decoupling gaps by embedding feedback into routines, yet action depends on transformational leadership to frame urgency, mobilize stakeholders, and sustain follow-through (Bass, 1990; Scott, 2014).

Theme Summary. Across subsections, CDO workforce impact is shaped less by the existence of the role than by where authority lives, how governance distributes decision rights, and whether equity tools are embedded into regular hiring routines. Institutional theory explains stalled reforms as decoupling between espoused priorities and core processes. Transformational leadership clarifies how, in the absence of strong formal levers, CDOs can build coalitions and reframe norms, though durable gains ultimately require both cultural influence and structural alignment.

Theme Four. Organizational Resistance to DEIB

Institutional Reluctance to Implement Structural DEIB Changes. Even when institutions articulate strong commitments to DEIB in mission statements or strategic plans, they often resist deeper structural transformation, which is a resistance rooted in institutional history, silos, and entrenched decentralized cultures (Breen et al., 2025). This opposition tends to intensify when DEIB efforts necessitate policy reform, budget reallocation, curricular restructuring, or changes to governance structures, which disrupt established norms and trigger institutional resistance (Alzahmi et al., 2025). As Gündemir et al. (2024) illustrated, such initiatives often trigger organizational resistance that undermines lasting progress. Resistance is particularly pronounced in predominantly white institutions, where DEIB work is perceived not as foundational to academic excellence but as disruptive to institutional identity and governance (Ahmed, 2012; Gusa, 2010). Institutional theory explains how organizations preserve legitimacy by protecting existing routines, producing decoupling between DEIB rhetoric and core processes; transformational leadership highlights how CDOs must frame vision, build coalitions, and sequence change to reduce threat and translate commitments into practice (Bass, 1990; Meyer & Rowan, 1977; Scott, 2014).

Lack of Executive Buy-In. A persistent barrier to effective and enduring DEIB initiatives is the absence of consistent, visible support from senior leadership. Esparza et al. (2024) found that DEIB leaders in U.S. academic health centers frequently lack the necessary authority, staffing, and resources, even when their institutions publicly commit to diversity, causing their efforts to be marginalized. Similarly, Dashield (2022) emphasized that when DEIB is not embedded into strategic planning and leadership structures, it often becomes reactive and subject to fluctuation with changes in leadership or political context. Embedding equity priorities into institutional strategy, as advocated by Zhao et al. (2024), is critical for insulating DEIB initiatives from volatility and ensuring they remain central to institutional planning and culture. Moreover, Bada et al.

(2024) reinforced the importance of structural alignment by showing that inclusive leadership and policy innovations, which require visible executive commitment, are foundational to embedding equity across all institutional functions, not just rhetoric. Absent executive sponsorship sustains decoupling by withholding decision rights and resources; transformational behaviors (vision casting, modeling, and reinforcement) are more effective when top leaders signal priority and confer legitimacy (Bass, 1990; Scott, 2014).

Symbolic Compliance and Performative Allyship. Symbolic compliance refers to when institutions publicly signal commitment to equity, through rhetoric, titles, or symbolic initiatives, but fail to enact the deep, structural, or cultural changes required to realize true equity (Edelman, 2016). Ahmed (2012) critiqued how equity-oriented institutional messaging can become non-performative, serving as a form of virtue-signaling that ultimately reproduces existing power structures. Rather than enacting meaningful accountability, institutional actions such as hiring a CDO without granting authority or resources, launching isolated training programs without follow-through, or issuing DEIB statements not woven into governance, function as performative allyship; visible but empty acts that leave entrenched hierarchies intact (Roman, 2022). A study by Bradley et al. (2022) found that simply appointing a CDO had no significant impact on faculty diversity, suggesting these roles often serve more as symbols than changemakers. Additionally, Wang (2025) argued that this reflects symbolic displays of equity, where leaders publicly champion inclusion but do not pursue the deeper structural reforms needed to realize those commitments. Symbolic action maintains legitimacy while preserving the status quo, which is classic decoupling. Transformational responses include shifting from signals to systems by aligning incentives, accountability, and cross-unit routines (Bass, 1990; Meyer & Rowan, 1977).

Political and Legal Pressures. Political and legal backlash further complicates DEIB advancement, especially in the current national climate (McGowan et al., 2025). A surge of anti-DEIB legislation and executive orders is stalling institutional efforts, as many states have passed bans on DEIB statements, funding, or offices, which have led colleges and universities to rebrand or dismantle DEIB units to avoid legal risk (Gretzinger et al., 2025; Schachle Gordon et al., 2025). In states with restrictive laws, institutions have rolled back or renamed their DEIB offices to navigate uncertain legal terrain, often framing them under alternative labels like *belonging* (Gretzinger et al., 2025). These constraints leave DEIB leaders operating in ambiguous and often hostile environments, forced to navigate change management without clear institutional or legal support (Dhanani et al., 2024). External coercive pressures reshape the field's legitimacy conditions (institutional theory), requiring transformational reframing, coalition-building, and risk-aware sequencing to preserve equity aims within legal constraints (Bass, 1990; Scott, 2014).

Woke Fatigue and Institutional Retrenchment. Institutions may retreat from DEIB efforts due to Woke Fatigue, a form of resistance that arises when stakeholders feel emotionally exhausted by diversity discourse or threatened by institutional shifts (Smith et al., 2021). Researchers Major and Kaiser (2017) explained how perceived status threats, where progress for underrepresented groups feels destabilizing, can trigger backlash or withdrawal from equity initiatives. This fatigue often manifests in retrenchment: institutions scaling back DEIB offices, narrowing budgets, or pursuing leadership changes cloaked in restructuring language (Smith et al., 2021). In regions dominated by anti-DEIB legislation, such retrenchment becomes even more pronounced (Schachle Gordon et al., 2025). Fatigue and status threat operate as cultural-cognitive barriers that sustain decoupling. Transformational strategies (empathy-forward communication, shared-purpose framing, and visible small wins) can reduce threat perceptions while maintaining momentum (Bass, 1990; Scott, 2014).

Resource Hoarding and DEIB Budget Constraints. DEIB work often lacks sustainable financial investment, leaving leaders to operate with minimal staffing, limited programming funds, and short-term project support (Esparza et al., 2024). A qualitative study of DEIB leaders at U.S. academic health centers revealed a substantial mismatch between institutional priorities and resource allocation, with many leaders noting insufficient authority, staffing, and funding to effectively enact change (Esparza et al., 2024). A recent national survey similarly found that 32% of Chief Diversity Officers oversee annual budgets under $39,000 and 44% manage with two or fewer staff members, emphasizing systemic underinvestment in DEIB infrastructures (National Association of Diversity Officers in Higher Education [NADOHE], 2023). This resource deprivation constitutes a form of institutional resistance by signaling that DEIB is not prioritized at the same level as other university functions (Esparza et al., 2024). Such resource hoarding occurs when units or leadership resist allocating funds to DEIB efforts, which is especially problematic when visible outcomes are nonetheless expected (Pfeffer & Salancik, 1978; Scott, 2014). Chun and Feagin (2021) argued that without equitable resource distribution and long-term financial commitment, structural change remains unrealized. Budgetary underinvestment is a material expression of decoupling.

Transformational responses include broadening the coalition of budget sponsors and embedding equity criteria in routine resource decisions so that structures and signals align (Bass, 1990; Scott, 2014).

Theme Summary. Across forms of resistance, including cultural, political, symbolic, and fiscal, institutions can maintain legitimacy while limiting change.Institutional theory names this pattern decoupling; transformational leadership clarifies how CDOs respond by framing vision, building coalitions, sequencing reforms, and translating signals into systems. Durable progress requires both cultural influence and structural alignment to close the gap between espoused values and operational routines.

Theme Five. Systemic Barriers in Higher Education and Corporate Settings

Tokenism in DEIB Leadership Roles. Tokenism occurs when individuals with marginalized identities are placed in visible roles primarily as a symbolic gesture without granting the structural authority or support needed to drive real change (Holgersson & Romani, 2020). Holgersson and Romani (2020) illustrated how organizational culture shapes token experiences, showing that token positions may or may not empower individuals, depending heavily on cultural norms within the institution. In a similar vein, Esparza et al. (2024) found that many DEIB leaders operate with limited resources, staffing, and mandate, which severely constrain their ability to effect reform. Pemberton and Kisamore (2022) added that such role ambiguity, coupled with a trigger for burnout due to symbolic pressure, highlights how tokenism can manifest as a “hollow mandate,” a position marked by visibility but devoid of influence. Institutional theory explains token placement as a legitimacy signal that can remain decoupled from decision rights. Transformational leadership clarifies why CDOs lean on vision framing and coalition-building to convert visibility into practice, even as structures lag (Bass, 1990; Meyer & Rowan, 1977).

Further compounding this issue is the institutional tendency to conflate representation with transformation. The rise of the CDO role, while increased over the years in visibility, has often served as a symbolic gesture of formal commitment rather than a strategic beginning for systemic reform (Wilson, 2013). Appointing a CDO is too often viewed as a final solution rather than the starting point for deeper, systemic change. Wilson's (2013) qualitative study across several institutions found that stakeholders often perceive the appointment of a CDO as the completion of the institution's equity work despite the persistence of structural barriers. As Leon (2014) observed, the structural configuration of CDO roles varies widely, and certain models limit authority, leaving these leaders without real power despite their visibility. In such cases, CDOs can become targets of accumulated institutional frustration, absorbing blame when targeted outcomes stall (Washington, 2019). Without direct control over budgets or policy decisions, they are tasked with dismantling complex inequities while operating within underpowered organizational structures (Leon, 2014; Washington, 2019). Conflating representation with transformation maintains decoupling. Transformational strategies can surface shared purpose and sequence changes, but durable impact still requires aligned authority and resources (Bass, 1990; Scott, 2014).

Cross-Sector Learning: Corporate vs. Higher Ed DEIB Approaches.

Corporate entities have increasingly embraced DEIB as a strategic business imperative linked to innovation, productivity, and market competitiveness (Okatta et al., 2024). In contrast, higher education institutions often frame DEIB through moral or philosophical lenses, emphasizing values-based commitments over measurable outcomes (Starck et al., 2021). This divergence contributes to softer accountability mechanisms and slower adoption of DEIB practices in academia (Kezar & Eckel, 2004). While corporations are more likely to invest in leadership pipelines, performance metrics, and benchmarking tools to advance DEIB goals (Okatta et al., 2024), colleges and universities often struggle to move beyond symbolic commitments due to factors like decentralized governance, strong faculty autonomy, and siloed administrative structures (Ahmed, 2012; Kezar & Eckel, 2004). The absence of competitive market pressures in higher education may further reduce urgency around accountability and implementation (Scott, 2014). Sector logics shape how legitimacy is earned; higher education's decentralization heightens decoupling risk and makes transformational influence (coalitions across units, shared metrics, and reframed value propositions) critical to implementation (Bass, 1990; Scott, 2014).

Invisibility vs Hypervisibility of CDOs in Decision-Making. Chief Diversity Officers often inhabit a paradoxical space in which they are expected to be highly visible as symbols of institutional commitment to diversity while simultaneously being excluded from critical decision-making processes (Ahmed, 2012). This structural marginalization places them under intense scrutiny, even as they are left without meaningful authority over areas such as budgeting, strategic hiring, or institutional policy (Leon, 2014). The gap between high visibility and limited power undermines the legitimacy and perceived efficacy of the role, contributing to institutional skepticism and strained leadership dynamics (Williams & Wade-Golden, 2013). Furthermore, the expectation that CDOs serve as the singular representatives of marginalized communities places undue burdens of emotional and representational labor on these individuals, exacerbating burnout and job dissatisfaction (Ueda et al., 2024). Hypervisibility without authority is a hallmark of decoupling (Meyer & Rowan, 1977). Transformational responses include diffusing representation across leadership, modeling shared ownership, and embedding equity tasks in routine decision venues (Bass, 1990; Meyer & Rowan, 1977).

Structural Barriers in Board-Level Accountability. Despite growing public demands for DEIB progress, higher education boards seldom include DEIB metrics in executive leadership evaluations (Eckel, 2016). Standardizing DEIB benchmarks within board-level oversight and institutional leadership frameworks is necessary to move such efforts from the sidelines to the core of accountability mechanisms. Without such systemic integration, DEIB remains symbolic rather than strategic (Hurtado et al., 2012). Moreover, boards frequently lack the practical knowledge or interpretive skills to assess DEIB outcomes effectively (Eckel, 2016). Recognizing this gap, the Association of Governing Boards recommends equipping trustees with DEIB fluency, ethical frameworks, and governance tools to ensure meaningful and systemic advancement of equity (Association of Governing Boards of Universities and Colleges, 2021). Board routines are key sites where decoupling can be closed by making equity part of formal evaluation. Transformational leadership supports this shift by aligning vision, incentives, and monitoring practices at the top of the organization (Bass, 1990; Scott, 2014).

Legal Liability and Risk Management Impacts. Concerns over legal exposure, especially related to affirmative action, free speech, and Title IX, often lead higher education institutions to adopt caution and scale back proactive DEIB initiatives (Kalev et al., 2006). Diversity programs structured primarily around legal compliance have been shown to be less effective and may even provoke backlash or tokenistic shifts rather than meaningful change (Kalev et al., 2006). In organizational contexts more broadly, studies of legal endogeneity reveal that merely having compliance structures, such as grievance systems or antidiscrimination policies, can create a false sense of security, which leads institutions to underinvest in substantive equity efforts (Edelman et al., 2011). This cautious, law-driven posture becomes a subtle form of institutional resistance, reframing DEIB as a liability rather than an opportunity for growth (Ahmed, 2012). Compliance-only approaches preserve legitimacy while sustaining decoupling. Transformational strategies reframe risk, pair compliance with culture change, and link equity to mission and performance (Bass, 1990; Scott, 2014).

Theme Summary. System-level features such as tokenized appointments, sector logics that privilege values over accountability, hypervisibility without authority, weak board oversight, and compliance-first risk postures constrain CDOs' ability to drive change. Compared with corporate settings, higher education's decentralized governance and softer market pressures slow the embedding of equity routines. Board-level metrics, authority alignment, and risk reframing are pivotal to moving DEIB from symbol to strategy. Institutional theory explains how these arrangements preserve legitimacy while decoupling equity aims from decision processes. Transformational leadership points to levers CDOs can pull, including coalitions, shared metrics, and sequenced reforms, while intersectionality keeps attention on how structures differently burden leaders with marginalized identities.

Theme Six. Identity-Based Challenges for CDOs

The Unique Struggles of Black CDOs. Black DEIB leaders at predominantly white institutions often face an insidious tension of being highly visible yet marginalized within governance structures. Dancy et al. (2019) detail how Black administrators and faculty are positioned at the nexus of visibility and exclusion, encountering racialized scrutiny even as they are sidelined in decision-making. Similarly, mentoring scholars such as Zambrana et al. (2015) described how underrepresented faculty, and by extension leaders, are over-relied upon during crises but frequently experience institutional isolation and inadequate support. These dynamics compound the emotional burden of Black CDOs, who must navigate interlocking pressures of representation without authority. Drawing on Crenshaw (1989), intersectionality explains how race and role combine to intensify scrutiny and isolation. Recent work centered on Black women DEIB leaders in historically White institutions shows how hypervisibility, credibility tests, and role ambiguity converge to intensify this scrutiny and marginalization, even when leaders possess extensive expertise and cabinet access (Johnson, 2023). Meyer and Rowan (1977) use institutional theory to name the gap between symbolic inclusion and decision access as decoupling. Bass (1990) shows that transformational leadership highlights the added reliance on influence strategies when formal authority is thin.

Emotional Labor and Hypervisibility. In addition to formal responsibilities, CDOs, especially those from historically marginalized backgrounds, often bear the added burden of managing racial trauma, microaggressions, and cultural disconnects in their daily work (Griffin, 2020; Niemann, 1999). Their bodies and identities are politicized, rendering them hypervisible in times of crisis but invisible in strategic planning (Smith, 2004). This dynamic creates a psychological toll that contributes to burnout, short tenure, and attrition across the field (Dancy et al., 2019). Moreover, the expectation to fix institutional racism while experiencing it firsthand creates an untenable contradiction that few other senior leaders face (Dancy et al., 2019; Smith, 2004). Intersectionality centers the lived strain of hypervisibility without corresponding power (Crenshaw, 1989); institutional theory accounts for its persistence within established routines and legitimacy maintenance (Scott, 2014); and transformational leadership clarifies the need for framing, empathy, and coalition-building to sustain progress under these conditions (Bass, 1990).

Racial Battle Fatigue in Executive Roles. CDOs, particularly those from racially marginalized backgrounds, often experience racial battle fatigue, which is a cumulative stress response resulting from chronic exposure to racial microaggressions, resistance, and institutional inertia (Franklin et al., 2014; Smith, 2004). Originally theorized by Smith (2004), racial battle fatigue has been expanded in executive and leadership contexts, where leaders must navigate heightened scrutiny, tokenization, and expectations to solve systemic issues they simultaneously endure (Franklin et al., 2014). Griffin (2020) describes how such fatigue manifests in emotional strain and undermines professional efficacy due to persistent challenges to legitimacy and authority. Additionally, the lack of institutional structures that acknowledge or mitigate the toll of racialized leadership amplifies the psychological and physical impact of this role (Smith et al., 2016). These conditions erode resilience over time and contribute to short tenure and attrition among CDOs and similar equity leadership roles (Griffin, 2020; Turner et al., 2008). Intersectionality makes visible the cumulative and identity-contingent nature of racial battle fatigue (Crenshaw, 1989); institutional theory points to organizational inertia and routine preservation that allow this toll to persist (Scott, 2014); and transformational leadership underscores the role of restorative practices, sponsorship, and distributed ownership in maintaining leader efficacy (Bass, 1990).

Double Burden of Representing Identity and Driving Change. CDOs from racially and ethnically marginalized communities frequently face a dual burden. They are expected to lead systemic institutional transformation while also serving as symbolic representatives of their identity groups (Griffin, 2020; Nixon, 2017). This dual expectation often requires CDOs to act as cultural interpreters, racial healers, and agents of change, all while contending with racialized scrutiny, hypervisibility, and a lack of institutional support (Nixon, 2017; Smith, 2004). According to Williams and Wade-Golden (2013), these leaders are often granted visibility without authority, meaning they are celebrated symbolically but denied the structural power or resources needed to drive meaningful change. The contradiction between institutional rhetoric and actual support structures contributes to emotional dissonance and burnout, particularly when CDOs are excluded from senior leadership decisions or when their legitimacy is questioned due to the perception that their authority stems from identity politics rather than strategic leadership capacity (Griffin, 2020; Smith, 2004). This dynamic is especially pronounced for Black, Latiné, and Indigenous CDOs who must navigate organizational cultures that tokenize their identities while positioning them at the forefront of complex and politically charged equity efforts (Nixon, 2017). Research focused specifically on Black women DEIB executives further document how identity representation obligations and expectations to *fix* culture compound strategic workload and heighten legitimacy challenges within historically white academic settings (Johnson, 2023). Intersectionality surfaces the representational burden and dual expectations placed on marginalized leaders (Crenshaw, 1989); institutional theory frames visibility without authority as a form of decoupling (Meyer & Rowan, 1977); and transformational leadership points to diffusing representation and embedding equity work into routine governance as practical levers (Bass, 1990).

Emotional Labor and Professional Loneliness. The role of the CDO involves substantial emotional labor, including responding to campus crises, educating reluctant stakeholders, and supporting marginalized communities, often without adequate institutional recognition or support (Vigil et al., 2023). Ueda et al. (2024) found that institutions can help mitigate this emotional toll by creating shared leadership structures, providing spaces for emotional processing, and encouraging leaders to model vulnerability. This emotional labor is frequently performed in isolation. Nixon (2017) highlighted how identity- and role-related isolation, navigating stereotypes and microaggressions, and balancing competing expectations contribute to a pervasive sense of professional loneliness among CDOs.

Williams and Wade-Golden (2013) characterize the CDO role as boundary spanning and highly visible during institutional unrest, yet structurally excluded from core decision-making, which effectively renders it a high-risk, low-authority position. The combination of emotional labor and isolation fosters conditions that significantly increase burnout risk and turnover. Pemberton and Kisamore (2023) found that unclear role definitions, insufficient top-management support, and experiences of tokenism are associated with heightened burnout among DEIB professionals. Similarly, Weissman (2025) reported that CDOs frequently describe stress, anxiety, physical symptoms such as hypertension and sleep disturbances, and feelings of marginalization to the point of perceived invisibility on campus. Intersectionality helps explain compounded isolation and differential scrutiny (Crenshaw, 1989); institutional theory identifies structural exclusion from decision venues as a driver of loneliness (Scott, 2014); and transformational leadership highlights interventions such as sponsorship, team-based leadership, and structured reflection to mitigate burnout (Bass, 1990).

Cultural Taxation and Psychological Safety. Cultural taxation, originally defined by Padilla (1994) as the added, uncompensated service and representational duties expected of scholars of color, remains a pervasive burden for CDOs and other marginalized professionals. It refers not only to formal committee service but also to the expectation that they will continuously represent their identity group, act as resident experts on equity issues, and shoulder invisible labor in ways that white colleagues are rarely asked to do (Hanasono et al., 2019; Padilla, 1994). These obligations often extend beyond formal job descriptions and include mentoring marginalized students, counseling staff, mediating conflict, and managing the optics of institutional failures (Briggs et al., 2022; Johnson et al., 2023). Over time, the cumulative weight of cultural taxation has been shown to compromise well-being, professional advancement, and career satisfaction, as the very expertise and identities that position individuals for leadership are simultaneously sources of exploitation (Hanasono et al., 2019).

This inequitable burden also intersects with psychological safety. When professionals feel tokenized or overextended, it becomes difficult to express dissent, vulnerability, or critique without fear of backlash (Johnson et al., 2023). Moreover, while institutions frequently expect CDOs to model inclusive culture, they often fail to reciprocate with structural support, leaving these leaders in positions where they must perform inclusion without experiencing it themselves (Catalyst, 2022). This cycle of cultural taxation, under-resourcing, and scrutiny has been directly linked to high turnover and burnout in DEIB leadership roles (Ching, 2025). Intersectionality clarifies how identity and role expectations multiply invisible labor and constrain voice (Crenshaw, 1989); institutional theory explains how compliance-era routines leave equity work decoupled from core practices (Meyer & Rowan, 1977; Scott, 2014); and transformational leadership underscores institutionalizing shared accountability and building psychologically safe leadership norms (Bass, 1990).

Theme Summary. Identity-based challenges do not sit apart from organizational design. They are produced and sustained by the same structural dynamics identified earlier, including visibility without decision rights, ambiguous placement, compliance-first postures, and underinvestment. Intersectionality illuminates how these structures burden leaders differently across race, gender, and other identities. Institutional theory explains the persistence of these patterns as legitimacy-seeking arrangements that leave equity work decoupled from core routines. Transformational leadership clarifies the practices that CDOs use to navigate and counter these conditions, yet it also makes plain that durable relief requires structural alignment in reporting lines, authority, resources, governance access, and evaluation.

Summary

The literature shows steady growth in senior-level DEIB leadership and an increasing reliance on CDOs to advance institutional change. It also documents persistent barriers that blunt their impact, including nonstandard metrics that privilege what is easy to count over what signals cultural change, ambiguous authority and reporting lines, decentralized governance that dilutes accountability, and chronic underinvestment.

Evidence further demonstrates that identity-based burdens such as hypervisibility, cultural taxation, and racial battle fatigue shape how CDOs experience legitimacy and influence, especially at predominantly white institutions. Considered together, these strands depict a recurring pattern: institutions often secure legitimacy through symbolic structures while core decision routines remain unchanged, and CDOs are left to lean on influence rather than authority.

What is missing is an actor-centered account that connects these structural conditions to how CDOs themselves make meaning of their roles and translate that meaning into day-to-day strategies. Existing studies seldom trace how leaders interpret authority, culture, and external pressures across different institutional contexts, nor do they show how those interpretations shape the practical sequencing of reforms, coalition building, and the use of evidence over time. There is also limited synthesis that integrates institutional theory, transformational leadership, and intersectionality to explain when and how symbolic commitments become embedded practice.

This study addressed these gaps through a basic interpretive qualitative design that centers CDOs' meaning-making. Using semi-structured interviews with current and recently serving senior CDOs across diverse four-year institutions, the study examined how leaders interpret role conditions, leadership culture, and political context, and how those interpretations inform the strategies they report using. Institutional theory guided analysis of legitimacy and decoupling, transformational leadership clarified how vision and influence become practical levers, and intersectionality kept attention on identity-contingent experiences. By linking interpretation to action, and action to organizational design, the study contributes an integrated explanation of when CDO roles move from symbol to system and offers actionable guidance for aligning authority, resources, and governance with stated equity commitments.

Chapter III

Methodology

This chapter details the methodology for a basic interpretive qualitative study of the experience-grounded beliefs of Chief Diversity Officers (CDOs) in U.S. four-year higher education. It examines their role conditions and how these conditions intersect with leadership culture and external pressures within institutional contexts. A basic interpretive approach was appropriate because it prioritized participants' construction of meaning in context (Merriam & Tisdell, 2016) and considered how those interpretations shape the strategies they use to navigate resistance, build coalitions, and pursue institutional change (Maxwell, 2013). Consistent with a constructivist epistemology, this study assumed multiple, context-bound realities and treated knowledge as co-constructed through researcher-participant interaction during interviews and analysis (Creswell & Poth, 2018; Lincoln & Guba, 1985; Merriam & Tisdell, 2016). In line with this stance, the design centered participants' voices and the meanings they ascribe to their roles within complex organizational settings (Creswell & Poth, 2018).

Semi-structured interviews served as the primary method of data generation, providing structure and flexibility to probe areas of significance while maintaining alignment with the research questions (Kvale & Brinkmann, 2015). Semi-structured interviews are particularly compatible with a constructivist approach because they enable collaborative sense-making as participants and researchers jointly articulate and clarify meanings (Kvale & Brinkmann, 2015). Within a constructivist stance, my positionality is part of the inquiry; interview exchanges and subsequent interpretation are co-constructed products of participant accounts and my analytic lens (Kvale & Brinkmann, 2015; Merriam & Tisdell, 2016). I therefore maintained reflexive memos and an audit trail to make these interpretive moves transparent (Lincoln & Guba, 1985). I analyzed data using Braun and Clarke's (2006) thematic analysis, a systematic yet flexible approach well-suited for identifying patterns across qualitative data while accommodating both inductive and deductive insights. Findings were then interpreted through the theoretical frameworks and sensitizing concepts introduced in Chapter Two – institutional theory, transformational leadership, and intersectionality – to illuminate how organizational structures, leadership practices, and social identities converge in shaping the CDO role.

Research Design

This study employed a basic interpretive qualitative design. As the researcher, I adopted a constructivist epistemology in which knowledge is co-constructed through interaction with participants and meanings are historically and socially situated (Creswell & Poth, 2018; Merriam & Tisdell, 2016). I used semi-structured interviews as the primary method of data generation because the study examined CDOs' *meaning-making* around role conditions (specifically authority, resources, and reporting lines). As discussed in the Instruments and Protocol section below, I used an interview protocol (see Appendix A) to ensure consistent coverage of the focal domains with each participant and to keep conversations anchored to the research questions. In addition, flexible probes elicited context-specific episodes (e.g., navigating resistance, coalition building, and responses to policy shifts) that fixed-format instruments could miss (Kvale & Brinkmann, 2015; Merriam & Tisdell, 2016). This format was particularly appropriate for politically sensitive, high-discretion executive roles, where participants' language and narratives themselves constitute critical analytic material (Kvale & Brinkmann, 2015).

I analyzed data using Braun and Clarke's (2006) thematic analysis, a systematic yet flexible strategy that identifies patterned meanings within and across cases while preserving the centrality of participants' voices. My data analysis process is described in detail in the Data Analysis Procedures section below. Consistent with constructivist epistemology, I maintained reflexive memos and an audit trail to document interpretive decisions and enhance credibility and transparency (Lincoln & Guba, 1985). This design aligns with the dissertation's overall logic: Chapter One establishes the study's significance and scope; Chapter Two outlines the theoretical lenses, research questions, and review of literature; and the present chapter operationalizes those aims through purposeful sampling, semi-structured interviewing, thematic analysis, and strategies for trustworthiness and ethics.

Research Questions

- **RQ1**. How do Chief Diversity Officers in U.S. higher education make meaning of their role conditions, including organizational design and external pressures, as they experience their work within their institutions?
- **RQ2**. How do Chief Diversity Officers make sense of leadership culture in relation to their perceived influence and legitimacy, and how do these interpretations inform the strategies they report using?

Population and Participant Selection, Criteria, and Recruitment

Population

The population for this study consisted of senior-level CDOs currently or recently serving at U.S. four-year higher education institutions. For this research, "recently serving" refers to leaders who have held the role within the past five years, a timeframe that captured contemporary experiences while minimizing recall bias (Dex, 1995; Hassan, 2005). Senior-level CDOs were defined as those with institution-wide responsibility for diversity, equity, inclusion, and belonging efforts, typically reporting to the president, provost, or another senior cabinet-level officer, and engaged directly in shaping institutional policy and culture. This focus excluded mid-level or unit-bound diversity leaders, as only senior-level CDOs occupy positions with formal authority and broad institutional scope, making them the most appropriate participants for exploring the study's questions on influence and legitimacy. These leaders are uniquely positioned to reflect on questions of authority, influence, and institutional support because their roles are embedded in executive decision-making structures.

The study intentionally drew on a small and information-rich pool, with an anticipated sample of 8–12 participants, which concluded with nine. The range and final participant count fit the aims of the project because it permitted sustained engagement with each participant's account, including probing for concrete episodes and follow-ups. Qualitative conventions that prioritize depth over breadth support this balance, and a sample of this size was sufficient to identify recurring patterns across diverse contexts without sacrificing within-case nuance (Creswell & Poth, 2018; Merriam & Tisdell, 2016). The sample size also reflects the structure of the field, as the CDO is typically a single, institution-wide executive role (Leon, 2014; Williams & Wade-Golden, 2013; Worthington et al., 2020). So, each participant generally represents a distinct institutional context; thus, a sample of nine participants also captured at least nine institutional contexts. Practically, nine interviews produced a corpus that can be transcribed, coded iteratively, memoed, and member-checked within a doctoral timeline, while preserving the analytic depth the study requires.

Selection of Participants

Purposeful sampling guided participant selection, with an emphasis on maximum variation to capture heterogeneity across institutional contexts. Purposeful maximum-variation sampling meant deliberately recruiting participants who differ on key contextual features expected to shape how they experience the CDO role, so the study reflects a wide range of meaning-making rather than a single institutional profile (Merriam & Tisdell, 2016; Patton, 2015). I sought variation by sector (public vs. private), institutional size and mission (e.g., regional comprehensives, R1/R2 research universities, and faith-based institutions), reporting lines, geography, and participants' social identities. This approach enhanced transferability by ensuring that findings represent a broad spectrum of perspectives rather than a narrow slice of higher education (Patton, 2015).

This approach did not aim for statistical representation; it helped identify patterns that cut across diverse contexts and made important contrasts visible, which strengthened transferability with a small sample. Purposeful maximum-variation sampling was especially appropriate for this study because it allowed for comparison of how authority, influence, and institutional support are perceived in different institutional and social settings (Patton, 2015). The sample size of nine participants was appropriate for achieving thematic sufficiency while still allowing for in-depth analysis of each case (Creswell & Poth, 2018). Snowball sampling was also used to identify additional participants, particularly in cases where leaders were difficult to access due to delayed responses or the politically sensitive nature of their roles. Snowball sampling (also called chain referral) supplemented recruitment: at the close of the interviews, I invited participants to suggest other senior CDOs who meet the inclusion criteria; I then contacted those individuals directly. This technique was useful for small, difficult-to-access populations because trusted referrals can increase response while still allowing the researcher to apply the same eligibility screen to all contacts (Creswell & Poth, 2018; Merriam & Tisdell, 2016; Patton, 2015).

Inclusion/Exclusion Criteria

Establishing clear inclusion and exclusion criteria was critical for maintaining coherence between the study's purpose, its sampling strategy, and its population, thereby reinforcing both methodological rigor and conceptual alignment (Creswell & Poth, 2018; Merriam & Tisdell, 2016). To be included in the study, participants must have been the senior-level and highest-ranking, institution-wide DEIB leader at their institution, regardless of formal title. They needed to be currently serving or served within the past five years, for at least one continuous year in the role at a U.S. four-year higher education institution, and they needed to be able to participate in interviews conducted in English. A one-year minimum ensured exposure to a full annual cycle of executive work, including planning, budgeting, evaluation, and governance, so participants can speak meaningfully to authority, resources, reporting lines, and institutional support. It also limited accounts based only on onboarding or transitional periods (Dex, 1995; Hassan, 2005; Kvale & Brinkmann, 2015; Merriam & Tisdell, 2016). These criteria ensured participants had both the scope of responsibility and the recency of experience necessary to address the study's questions about the CDO role. Exclusion criteria were designed to maintain the study's focus: individuals serving in K–12, nonprofit, or corporate DEIB leadership roles were not considered, nor were those whose responsibilities are limited to unit-specific positions that do not carry institution-wide authority. These delimiting exclusions ensured alignment between the study's purpose and the sample population (Merriam & Tisdell, 2016). The criteria collectively reinforced the goal of studying CDOs whose leadership scope positions them at the intersection of institutional decision-making, culture, and change.

Recruitment

Recruitment began after receiving IRB exemption from Valdosta State University (see Appendix B), and it followed a structured process. Step 1: I identified prospects via national associations and directories (e.g., NADOHE membership lists, conference programs), institutional leadership webpages, and my professional networks. Step 1a: I posted an IRB-approved recruitment flyer (see Appendix C) on LinkedIn and in relevant professional groups (e.g., NADOHE, ACE, DEIB communities on Facebook/GroupMe). The flyer included the study purpose, eligibility, time commitment, confidentiality, voluntary nature, a non-evaluative role statement, and a screening link/QR code. To protect privacy, posts ask interested individuals to reply by email or complete the screening form rather than comment publicly. I maintained a recruitment log of dates, venues, and responses. These strategies were well-suited to a small, dispersed population that is highly visible within professional organizations (Creswell & Poth, 2018).

Step 2: I verified likely eligibility from public information (title; reporting line; four-year institution). Step 3: I sent a standardized email invitation (Appendix D) explaining the study purpose, eligibility, time commitment, confidentiality, voluntariness, and my non-evaluative role. Step 4: I administered a brief Qualtrics screening form (Appendix E) to confirm inclusion criteria (senior-most, institution-wide CDO; U.S. four-year institution; at least one year in role; current or within the past five years; able to interview in English) and to gather basic context fields used later to achieve maximum variation (sector, Carnegie classification, region, reporting line/cabinet status, years in role, office staffing range; demographic items are optional). Step 5: I scheduled the interview via a shared calendar link and sent the consent statement (Appendix F) and the Pre-Interview Protocol (Appendix G), which outlined logistics, the non-evaluative nature of the study, confidentiality reminders, and optional pre-reflection prompts. Step 6: I sent one reminder to non-responders after seven days (Appendix H). Step 7: I used snowball sampling by asking participants at the close of the interview whether they know other senior CDOs who may fit the criteria. These procedures aligned with qualitative best practices for recruiting information-rich participants and linking data generation to the study's research questions (Creswell & Poth, 2018; Patton, 2015).

Privacy and confidentiality during recruitment. Screening responses were used only to determine eligibility and schedule interviews. For enrolled participants, I replaced names and institutions with pseudonyms in all working files and reports. The only file linking real names to pseudonyms was a password-protected spreadsheet stored on a separate, password-protected, full-disk-encrypted drive that was not synced to any cloud service. Access to that linkage file was restricted exclusively to me.

Data disposition for nonparticipants. If someone was not eligible or chose not to participate, I deleted their screening information within 30 days. For enrolled participants, direct identifiers (name, institution, email) were retained only as needed to schedule, conduct member checks, and manage consent. After those activities, identifiers remained solely in the separate linkage file described above. In accordance with VSU IRB policy, I retain identifiable records for a minimum of three years after study completion and then securely destroy them; I will permanently delete the linkage file and any remaining identifiers.

Instruments and Protocol

Interview Guide

The semi-structured interview protocol specified the procedures that ensured consistent administration across participants, including the opening and closing scripts, informed-consent reminders, recording notes, timing checkpoints, and the closing member-check (Kvale & Brinkmann, 2015; Merriam & Tisdell, 2016). Complementing that, the interview guide contained the content of the interview: the sequence of core questions aligned to the research questions (RQs), the “data needed” column, and a list of potential probing questions that may be used as appropriate. This division supported the basic interpretive approach by balancing procedural consistency with content flexibility to follow participants’ meaning-making in their own terms (Kvale & Brinkmann, 2015; Merriam & Tisdell, 2016).

I organized the guide into five parts: (1) brief rapport and role context; (2) role conditions (authority, resources, reporting lines) and external pressures; (3) leadership culture and perceived influence/legitimacy; (4) strategies participants report using to move work forward; and (5) a closing, on-the-spot member-check to verify descriptive accuracy. Core questions anchor each part to the RQs; potential probes invite concrete episodes and exceptions without leading participants. The complete protocol (procedures) and guide (content) appear in Appendix A.

I piloted the guide with one person who was external to the study sample. The pilot was intended to check clarity, flow, and elicitation power of the interview guide so that questions consistently prompt concrete episodes and meaning-making aligned with RQ1 and RQ2. The brief pilot also helped estimate timing, identify wording that invite yes/no answers, and surface any items that could create unintended risk or confusion for participants (Kvale & Brinkmann, 2015; Merriam & Tisdell, 2016; Patton, 2015). I conducted the pilot interview with a senior DEIB leader who resembles the target population but was not eligible for the study sample. When planning the pilot, I considered that ideal pilot participants would be former CDOs who left the role more than five years ago, senior associate-level DEIB leaders who were not the institution-wide executive, or CDOs working outside U.S. four-year higher education. I recruited via my professional network using a short email invitation that explained the purpose of the pilot (see Appendix I), the non-inclusion of pilot data in the study, the expected time commitment, and confidentiality practices.

I conducted the one Zoom pilot using the full script, opening, and closing planned for the study. The session ran 75 minutes. During the interview I timed each section, noted where prompts confuse or stall, and tracked the length and specificity of responses. Immediately afterward, I completed a short debrief with the pilot participant about clarity, elicitation, tone, redundancy, and order. I then wrote a contact-summary memo and an instrument-refinement memo. No adjustments were necessary, so I did not revise the guide. The pilot interview was solely for instrument improvement. I did not record the interview or generate a transcript, and I did not use the pilot information to contribute quotations or findings to the study.

Researcher Memoing

I used researcher memoing across all phases of the study as a reflexive and analytic practice that linked data collection with analysis. I used memos to record interpretations grounded in specific data segments, to document methodological decisions and their rationales, and to note how my positionality may be shaping attention and sense-making (Maxwell, 2013; Saldaña, 2021). The point was not simply to "take notes," but to create an ongoing written conversation with the data that I could revisit, test, and refine as the study unfolded. In terms of cadence, I wrote memos at several predictable moments. After each interview and transcript review, I wrote a contact summary that identified salient ideas, surprises, potential follow-ups, and any ways my role may have influenced the exchange. I conducted these summaries within 24 hours of each interview in an effort to vividly remember all pertinent details. While verifying transcripts, I noted tonal cues or emphases that matter for interpretation. During first-cycle coding, I kept coding memos that explained where codes came from, how they were applied, and where boundaries seemed unclear. Between first- and second-cycle coding, I wrote integrative memos that proposed relationships among categories and sketched tentative theme statements. After member checks and peer debriefs, I recorded what feedback was offered, how it weighed on the analysis, and what I would change or hold. As I moved into writing, I composed interpretive memos that tied themes to the research questions and relevant literature, marking strong claims and those that remained provisional.

Procedurally, each memo followed a simple scaffold (see Appendix J) so entries were easy to audit: date and time; memo type (contact, coding, integrative, interpretive, method, or reflexive); participant or transcript identifier; a brief description of the triggering event (for example, *first-cycle coding*); a pointer to the relevant excerpt or timestamp; my interpretation and competing explanations; any decision taken; the rationale for that decision; the next analytic step; and a brief reflexive note. I saved memos in a dedicated folder and linked to timestamps; I time-stamped files for version control, and a simple decisions log (spreadsheet) summarized key methodological choices and where the supporting evidence can be found. I clearly marked reflexive content within each memo so that the personal standpoint is visible but analytically separable from claims grounded in the data. Transcripts themselves remained immutable after member check-ins and transcript verification.

Throughout the coding process, the codebook was a living document that defined each code and linked to supporting excerpts. It began with a small set aligned to the research questions and theoretical lenses and revised it as patterns are identified in the interviews. In reflexive thematic analysis, the codebook scaffolded analytic thinking rather than serving as a fixed measurement tool; accordingly, I iteratively added, merged, and retired codes and recorded every change with date and rationale in the decisions log. The codebook also tracked how codes were grouped into categories and themes, with warranting and disconfirming excerpts, so the chain of evidence from data to claims remained visible (Braun & Clarke, 2006, 2022).

This approach created a transparent audit trail and directly supports dependability and confirmability. The audit trail shows how raw materials (audio and transcripts) were reduced into codes, assembled into categories and themes, and then translated into claims, with memos linking each step to specific evidence (Maxwell, 2013; Saldaña, 2021). Dependability was strengthened because the process was documented in time-stamped entries that revealed procedural stability even as interpretations evolved with additional data. Confirmability was enhanced by requiring that every analytic move be tied to concrete excerpts and by recording alternative explanations that were considered and why specific interpretive choices were made; in other words, the reader can see that findings are anchored in the data rather than in researcher preference.

To make my reflexive process tangible and strengthen the audit trail, I incorporated visual evidence of reflexivity directly within Chapter Four and the appendix. Specifically, I included an excerpt of a selected reflexive memo created during the analytic phase. The excerpt illustrates how I examined and documented my positionality, assumptions, and evolving interpretations as the study progressed. In this context, reflexivity refers to the systematic examination of how my social position, professional experiences as a CDO, and interpretive lens may have shaped what I attended to, how I made sense of participants’ narratives, and how I represented their meanings in analysis. Including a visual memo as a figure offers readers concrete, verifiable evidence of the reflexive process and enhance the transparency, credibility, and trustworthiness of the study’s audit trail.

Practically, memoing fed the analysis in four ways. It guided codebook development by capturing boundary cases and rules of application, which informed merges, splits, and definition refinements. It supported theme building by mapping categories back to the research questions and flagging disconfirming evidence and conditions of applicability. It structured quality checks by maintaining a running list of negative cases and unanswered questions that shape subsequent interviews and targeted recoding. Finally, it accelerated writing, because the polished interpretive memos already contained the core logic, exemplars, and scope conditions needed for Chapter Four.

Data Collection Procedures

I collected data through semi-structured interviews conducted via Zoom, each planned for approximately 60–90 minutes. Zoom refers to the university-licensed, password-protected videoconferencing platform that supports stable audio, optional video, a waiting room, authenticated access, and local recording. Using Zoom enabled participation from a geographically dispersed pool of CDOs and still supported rapport through synchronous conversation and screen-mediated cues that were sufficient for a narrative, meaning-focused interview (Creswell & Poth, 2018). The 60–90-minute window was deliberate: it was long enough to move beyond surface description into concrete episodes, counter-examples, and sense-making (which this study required), while short enough to respect executive participants' schedules and mitigate interview fatigue that can compromise data quality.

At the beginning of each interview, I read the IRB-approved consent statement (see Appendix F) and expressly asked for consent to move forward with the interview. With participants' verbal consent, I recorded each interview with audio and video within Zoom. The analytic focus of the study was on participants' language and meaning-making; accordingly, audio was essential to capture wording and emphasis accurately. I enabled video with the consent of each participant, and it was used to assist interpretation of language, emphasis, and long pauses. I recorded and stored interviews on a full-disk–encrypted drive that is password-protected, accessible only to me, and not synced to cloud services. I coded from de-identified transcripts; I retained originals only for the IRB-approved period and then will delete them securely.

Transcription followed *verbatim with minimal clean-up* conventions aligned to the study's interpretive aims. Specifically, I transcribed words as spoken; I retained fillers (e.g., "um," "uh") only when they implicated meaning or hesitation relevant to the episode; I retained false starts when they altered meaning; I bracketed notable laughter, long pauses (greater than three seconds), and overlapping speech (e.g., [pause], [overlap]) when salient for interpretation; and I marked emphatic terms with italics in the analytic copy. To balance efficiency with quality, I generated a draft transcript by downloading the Zoom transcript and then conducted three verification passes: (1) a line-by-line accuracy pass against the audio/video to correct wording, speaker labels, terminology, proper names, and punctuation; (2) a clarity/consistency pass during first-cycle coding to confirm that excerpts driving analytic claims match the recording precisely and are consistently rendered; and (3) by sharing the cleaned transcript with each participant for their own verification. All choices here are consistent with the study's emphasis on participants' meaning-making rather than fine-grained conversation analysis (Marshall et al., 2022; Saldaña, 2021).

To protect confidentiality, I asked participants to choose pseudonyms, and I redacted or de-identified direct identifiers and other easily traceable details from the working transcripts and all reported excerpts. Allowing participants to select their own pseudonyms supported autonomy and enabled them to represent their identities in personally meaningful ways (Itzik & Walsh, 2023). Four participants chose their pseudonym, whereas the remaining participants asked me to assign one while providing guardrails (e.g., nothing inappropriate and a pseudonym that closely aligned with their cultural and ethnic identities). I stored de-identified transcripts and codebooks in a separate, encrypted project folder. Consistent with IRB guidance, I will store core research records for a minimum of three years after study completion; I destroyed identifiable audio/video files once transcripts are verified and member checks were complete, in accordance with the IRB-approved data management plan and institutional policy (45 C.F.R. § 46.115(b)).

Following transcription, I conducted a member check for each participant to enhance credibility. Member checking, also called respondent validation, is a key strategy for establishing credibility because it tests whether preliminary interpretations ring true to those who provided the accounts (Maxwell, 2013; Merriam & Tisdell, 2016). Member checks enhanced credibility by giving participants a structured opportunity to challenge my interpretations and verify factual accuracy before claims are finalized, which addresses a central validity threat in qualitative work, namely misinterpretation of participants' meanings. Participants received their transcript for factual accuracy, and throughout each interview, I repeated short summaries of what I understood to be the most salient points they raised. I invited participants to correct errors, clarify meaning, or add brief context; they were not be asked to approve findings or to conduct analysis. In this study, I logged all participant clarifications and incorporate warranted changes into the analytic memos and codebook, noting that the change originated in member feedback, which makes the chain of evidence auditable and strengthens credibility within the broader trustworthiness framework described by Marshall et al. (2022).

As detailed in the Researcher Memoing section, throughout data collection, I maintained analytic memos that documented preliminary interpretations anchored to specific transcript segments, the rationale for any methodological decisions (e.g., adding a probe in light of emerging negative cases), and brief reflexive notes on how my role as a senior administrator might be shaping attention or inference. These memos created a transparent audit trail linking raw transcript to transcript excerpts, codes, and evolving theme statements, thereby supporting dependability (procedural stability over time) and confirmability (claims traceable to evidence rather than preference) (Maxwell, 2013; Saldaña, 2021). Collectively, these procedures prioritized participants' experience and contextual sense-making in a way that is consistent with qualitative inquiry focused on meaning and interpretation (Merriam & Tisdell, 2016).

Data Analysis Procedures

I analyzed interview transcripts using Braun and Clarke's six-phase thematic analysis. I used NVivo for data management because it allowed secure storage on my encrypted drive, supported line-level coding with precise source references, and offered queries that helped test developing claims through co-occurrence, matrix coding, and text search. NVivo also facilitates an auditable trail by preserving code version histories, memo links, and query outputs in a single project file.

In Phase 1, familiarization, I read each transcript in full while listening to the corresponding audio to check tone and emphasis, then I wrote a contact summary memo that captured salient points, questions to probe in follow-up communication, and initial thoughts tied to specific line numbers. During this phase, I recorded reflexive notes about how my own administrative perspective could be shaping what draws my attention, and I marked any passages that appeared to speak directly to the research questions, such as descriptions of authority, reporting lines, or legitimacy. This work ensured that the first round of codes was grounded in the participant's language rather than in premature interpretation.

In Phase 2, initial coding, I conducted line-by-line first-cycle coding that used In Vivo and Values coding (Saldaña, 2021). In Vivo codes preserved participants' phrasing when the words themselves carried conceptual weight for meaning-making, such as "I can't make you do anything" and "the opposition is there." These phrases captured participants' interpretations of authority limitation and environmental resistance in ways that reflected their lived meaning-making of the role. Using participants' exact language allowed me to retain the interpretive depth embedded in how they described structural constraint, legitimacy negotiation, and leadership decision-making. Values codes named underlying attitudes, beliefs, and commitments evident in the talk, such as advancing DEIB work through the business case, stewardship reflected in being a good steward of institutional resources, and commitments to supporting students across their identity. I chose this combination because the study asked how senior CDOs construct and interpret their experience, which required honoring their wording while also surfacing the belief systems that organize action. Each code included a concise definition, inclusion and exclusion rules, and one exemplar quotation. I updated the codebook throughout transcription as needed, but I maintained versions to preserve the audit trail. I captured disconfirming evidence at this stage by creating a running memo for each provisional pattern where I record counterexamples and boundary conditions as they appear.

In Phase 3, searching for provisional themes, I reviewed code frequencies and, more importantly, code relationships using NVivo query tools and memoed comparisons. I grouped related codes into data-driven categories that aligned with the research questions. For RQ1, I identified clusters around role conditions and external pressures, including groupings that connected authority with decision rights and reporting proximity, as well as groupings that connected resource sufficiency with external accountability. For RQ2, I identified clusters that connected leadership culture with perceived legitimacy and reported strategies, including coalition building, sequencing, framing choices, and instances in which typical approaches did not produce desired outcomes. I wrote integrative memos that summarized the core analytic ideas, listed the composing codes, documented outliers, and linked exemplar excerpts that illustrated how participants made meaning of these patterns.

In Phase 4, reviewing themes, I tested each provisional theme against the coded extracts and then against the full data set. This process involved two checks. First, I examined whether each theme demonstrated internal coherence and whether the extracts that composed it genuinely belonged together. Second, I read across all cases to assess whether the themes remained analytically distinct and whether they captured patterns that directly addressed the research questions. I ran NVivo matrix queries to examine how themes intersected with contextual features relevant to interpretation, including cabinet membership and reporting line, and I explicitly searched for negative cases that challenged thematic boundaries. I documented revisions at this stage in a decisions memo that recorded what changed, why it changed, and the evidence that prompted each revision.

In Phase 5, defining and naming themes, I refined the analytic focus of each theme so that it stated a clear claim about meaning rather than functioning as a topic label. Each theme included a concise analytic definition, scope conditions that explained when it applied and when it did not, and explicit connections to the research questions. For example, a theme such as proximity without power was defined as an interpretation of authority experienced as visibility and relational access without decision-making control, with attention to moments when participants described influence that functioned outside of formal authority. At this stage, I incorporated the study's theoretical lenses of institutional theory, transformational leadership, and intersectionality to situate the themes within broader scholarly conversations. I used theory as an interpretive anchor rather than as a coding frame, which preserved the inductive development of the themes while clarifying how they spoke to institutional logics, leadership processes, and identity dynamics.

In Phase 6, producing the analytic narrative, I synthesized the themes into a coherent account that answered the research questions and was supported by vivid, well-contextualized excerpts. Each theme section included the analytic definition, relevant contextual framing, attention to contrastive cases, and carefully selected quotations that illustrated both typical patterns and meaningful exceptions. I demonstrated how the themes related to one another analytically, such as how resource constraints intersected with leadership culture to shape perceived legitimacy and strategic decision-making. I connected the findings back to the literature to indicate where the analysis confirmed, extended, or complicated prior scholarship. I also identified implications for practice and future research that were grounded in the evidence generated through participants' meaning-making.

Although the analysis proceeded inductively, these procedures remained transparent and auditable. I maintained researcher memos throughout the analytic process to record interpretive moves, alternative explanations considered, and analytic links from data to codes and from codes to themes, which supported analytic transparency and reflexive validity (Maxwell, 2013). I strengthened credibility through transcript member checks that verified transcription accuracy and allowed participants to clarify or elaborate on meaning, consistent with established trustworthiness practices in qualitative research (Lincoln & Guba, 1985). I also maintained systematic attention to disconfirming evidence through targeted analytic queries and negative case memoing, which supported rigorous theme refinement and analytic credibility (Braun & Clarke, 2006; Saldaña, 2021). I preserved an audit trail that included raw data, coded transcripts, versioned codebooks, analytic memos, query outputs, and a dated decisions log to document the interpretive process and maintain methodological coherence within a basic interpretive qualitative tradition (Marshall et al., 2022; Merriam & Tisdell, 2016).

Theoretical Anchors in Interpretation

I analyzed the data using theoretical lenses and sensitizing concepts drawn from institutional theory, transformational leadership, and intersectionality. While inductive coding allowed provisional themes to be identified directly from participants' accounts, these frameworks provided interpretive depth during later stages of analysis (Braun & Clarke, 2006; Maxwell, 2013). Institutional theory helped situate findings within organizational processes of legitimacy, authority, and structural decoupling (Meyer & Rowan, 1977; Scott, 2014). Transformational leadership provided a lens for examining how influence, vision, and leader–follower dynamics shaped participants' interpretations of the CDO role (Bass, 1985, 1990). Intersectionality illuminated how identity-contingent experiences, including race, gender, and sexuality, intersected with professional responsibilities to shape how participants navigated authority, legitimacy, and institutional support within their leadership contexts (Crenshaw, 1989; Nixon, 2017).

Using multiple theoretical anchors allowed for layered interpretation by bringing organizational, leadership, and identity-based perspectives into dialogue, which enriched the analytic process and strengthened the study's contribution to existing scholarship. I did not apply these frameworks as pre-established coding frames. Instead, I used them as interpretive anchors after coding to support analytic interpretation, which remained consistent with a constructivist orientation that privileged participants' voices while situating findings within established qualitative traditions (Braun & Clarke, 2006; Merriam & Tisdell, 2016).

Managing and Auditing Data

I stored all study files, including recordings, transcripts, memos, and analytic notes, on a full-disk-encrypted hard drive that was not synced to any cloud service. Access to the drive required my password, and the device locked automatically when idle to prevent unauthorized entry. I did not store study files in iCloud, Google Drive, OneDrive, Dropbox, or any other remote storage platform. This approach allowed me to maintain direct physical and digital control of all research materials while protecting participant confidentiality throughout the study. The encrypted drive served as the primary storage location for all research data.

In addition to the primary encrypted drive, I maintained a small, portable external

USB drive to create secure backup copies of study materials. The backup drive was password-protected and stored separately from the primary storage device when not in use. I stored identifiable materials, including original audio or video recordings and signed consent forms, in a separate folder from de-identified analytic files. I stored the master document linking participant names to pseudonyms only on the password-protected backup drive and never alongside transcripts or coded data. When not in active use, I secured both encrypted drives in a locked drawer located in my private home office, which only I could access.

To maintain analytic transparency and auditability, I preserved dated versions of transcripts, code tables, memos, and theme development notes throughout the analytic process. I maintained memos that documented analytic decisions, the rationale for each decision, the files affected, and the location of supporting excerpts within the data corpus. I also maintained versioned codebooks and memo logs that recorded how provisional themes were refined and stabilized across analytic phases. These procedures supported credibility, dependability, and confirmability by allowing the analytic process to be traced from raw data through theme development. Maintaining these records also supported reflexivity by documenting interpretive decisions and alternative explanations considered during analysis.

After verifying transcript accuracy and completing member checks, I deleted identifiable audio and video files in accordance with my IRB protocol. I retained core research records, including de-identified transcripts, codebooks, memos, and analytic decision logs, for a minimum of three years following completion of the study. I stored retained records on encrypted drives consistent with the data security procedures described above. After the required retention period, I will permanently delete remaining files and conduct secure erasure of storage devices to ensure the data cannot be recovered. These procedures align with institutional and federal guidance regarding confidentiality, data protection, and responsible research record management.

Trustworthiness and Rigor

The trustworthiness of this study was guided by Lincoln and Guba's (1985) four evaluative criteria: credibility, transferability, dependability, and confirmability. I supported the credibility of the study through several deliberate strategies. Prolonged engagement in this context involved 60–90-minute interviews with each participant and, when needed, brief follow-ups, typically 15–30 minutes, during analysis to clarify accounts or explore newly salient events. Participants were also invited to contact me to offer clarifications at any point in the process. I implemented strategic probing with a short set of standard probes, such as "Can you walk me through a specific episode?" "What happened next?" and "Was there a time it unfolded differently?" to elicit concrete, episode-based descriptions rather than general opinions (Kvale & Brinkmann, 2015). To enhance trust and fidelity to participants' intended meanings, I invited participants to review their verbatim transcripts and to suggest clarifications or redactions as part of member checking (Marshall et al., 2022). In addition, I actively sought out negative and disconfirming cases to ensure that interpretations reflected complexity rather than selectively affirming prior assumptions (Maxwell, 2013). I tagged counterexamples during coding, memoed how they challenged developing interpretations, and revisited them during theme review. These strategies strengthened credibility by demonstrating a commitment to accuracy, authenticity, and openness to multiple perspectives.

I promoted transferability through maximum-variation sampling and thick description of institutional contexts. Purposeful sampling across institution type, size, and governance structure allowed the study to capture breadth and diversity across CDO experiences (Patton, 2015). For each participant, I documented a brief context profile that included public or private control, region, Carnegie classification, approximate enrollment band, CDO title, reporting line, years in role, and office staffing range. In Chapter Four, I provided rich, anonymized snapshots of these settings and roles so readers could judge the applicability of interpretations to their own contexts (Merriam & Tisdell, 2016). By emphasizing variation and contextual depth, the study strengthened interpretive utility and relevance beyond the immediate sample.

I addressed dependability by creating a transparent audit trail that documented the research process from data collection through final analysis. The audit trail included versioned interview guides, dated analytic memos, a coding log that recorded code additions, retirements, and definitional refinements, and a code-to-theme map showing how codes were organized into provisional and final themes (Braun & Clarke, 2006; Saldaña, 2021). I also maintained a procedures log documenting recruitment steps, consent documentation, transcript handling, and member-check requests and responses so another researcher could follow the logic and sequence of decisions. This level of procedural transparency supported methodological consistency and reinforced the dependability of interpretations while acknowledging the contextually situated nature of qualitative inquiry.

I strengthened confirmability through systematic reflexivity and structured peer engagement. In this study, systematic reflexivity involved a planned cadence and set of artifacts that included an immediate post-interview memo documenting surprises, tensions, and potential bias, a bias self-check at the start of each coding session, and a rival-explanations log documenting alternative interpretations and the evidence supporting or challenging them (Lincoln & Guba, 1985; Saldaña, 2021). I conducted regular peer debriefs with one qualitative methods colleague and one practitioner-scholar unaffiliated with participants. During these sessions, we reviewed analytic memos, selected coded excerpts, and the evolving code-to-theme map while explicitly testing counter-interpretations. These practices helped manage bias and reinforced neutrality by ensuring interpretations remained grounded in participants' accounts rather than researcher predispositions (Maxwell, 2013; Saldaña, 2021). Additional detail regarding reflexive procedures and the treatment of disconfirming evidence appears in the subsequent Researcher Positionality and Reflexivity section. Attention to credibility, transferability, dependability, and confirmability established the overall trustworthiness and rigor of the study (Lincoln & Guba, 1985).

Researcher Positionality and Reflexivity

I identify as a Black and Mexican man who has served in senior diversity leadership roles in higher education. At the time I designed and proposed this study, I served as a Chief Diversity and Inclusion Officer for a private higher education institution. I later transitioned into an Associate Vice President for Organizational Transformation role following an institutional restructuring that repositioned me within human resources. I subsequently resigned from that role and returned to senior DEIB leadership, Chief Diversity Officer, at public higher education institution while completing data analysis and dissertation writing. These professional transitions expanded my understanding of how institutions structure, reposition, and interpret DEIB leadership roles across organizational contexts. Experiencing DEIB leadership across differently structured organizational environments heightened my attention to variation across participants' institutional contexts and reinforced my commitment to grounding interpretations in participants' accounts rather than personal experience.

My professional history as a senior DEIB administrator provided insider knowledge of executive structures and the day-to-day realities of leading DEIB work. It also reflected long-standing commitments to inclusive excellence and social justice. This positioning supported access, rapport, and interpretive sensitivity, while also inclining me toward particular readings of authority, institutional resistance, and leadership culture. Making these lenses explicit remained essential in this constructivist study because my standpoint functioned as part of how knowledge was co-constructed through interaction with participants (Creswell & Poth, 2018; Lincoln & Guba, 1985; Maxwell, 2013).

To operationalize reflexivity, I integrated it across each stage of the study. Before data collection, I prepared a written positionality memo that named my assumptions about authority, resources, reporting lines, leadership culture, and external pressures, and I revisited this memo following interviews to document shifts in perspective. During recruitment and interviewing, I remained transparent about my background and clarified that I was acting solely as an independent researcher. I emphasized that I was not evaluating participants or their offices, was not reporting to their institutions, and that participation remained voluntary and confidential. When applicable, I disclosed prior professional familiarity and monitored how that familiarity influenced rapport or disclosure. I maintained field notes documenting power dynamics, rapport development, and moments where participants' accounts aligned with or challenged my expectations.

Throughout analysis, I maintained analytic memos to trace interpretive decisions across phases of thematic analysis and to distinguish participant language from my interpretive commentary (Braun & Clarke, 2006; Saldaña, 2021). I used peer debriefing as an external check on analytic reasoning. I also attended to disconfirming evidence by identifying data that complicated or contradicted developing codes or interpretations (Lincoln & Guba, 1985). During coding, I marked counterexamples and wrote brief memos documenting how those excerpts challenged working interpretations (Braun & Clarke, 2006; Merriam & Tisdell, 2016). During theme review, I conducted negative case analyses by deliberately searching for rival patterns, revising or discarding codes and themes when the evidence warranted revision, and documenting those decisions in a rival explanations log within the audit trail (Creswell & Poth, 2018; Lincoln & Guba, 1985). During interviews, I probed for exceptions and boundary conditions and, when appropriate, shared brief interpretive summaries with participants to surface disagreement and correct potential misinterpretations (Kvale & Brinkmann, 2015; Lincoln & Guba, 1985).

These reflexive practices balanced the advantages of my insider perspective with the need for analytic discipline. They supported analysis that remained grounded in participants' voices while maintaining transparency about how participants and I co-constructed meaning throughout the research process (Lincoln & Guba, 1985; Saldaña, 2021).

Timeline

Following the successful defense of the dissertation proposal (Chapters One–Three) on Monday, November 24, 2025, I submitted the Institutional Review Board (IRB) application and received approval on January 9, 2026. Upon approval, I began recruiting participants. I conducted interviews between January 13, 2026, and January 27, 2026. I recorded and transcribed each interview within approximately 24-48 hours and sent each verified transcript to participants for member checking with a 10-day review window. Member checking concluded on February 2, 2026, and I incorporated requested clarifications or redactions upon receipt.

Analysis (rolling):

- First-cycle coding: January 15 – 27, 2026 (accuracy pass completed before coding; clarity/consistency pass during coding).
- Second-cycle coding, theme development, peer debrief/theme review: January 28 – 30, 2026.
- Code-to-theme map locked: January 30, 2026.

Writing:

- Chapters Four and Five drats: January 30 – February 3, 2026.

Submission & Defense:

- Full dissertation draft submitted to chair *and* committee simultaneously: February 3, 2026.
- Chapters Four and Five revisions: February 5 – February 17, 2026.
- Defense scheduling request submitted upon chair's confirmation that the draft is defense-ready February 19, 2026.

- Defense date: March 3, 2026
- Post-defense revisions & Graduate School submission: April 2026 to meet May 2026 degree posting.

This timeline was intentionally ambitious and required sustained, focused immersion in the data. Following IRB approval on January 9, 2026, I dedicated multiple full workdays to coding, analytic memoing, theme development, and writing in order to remain consistently engaged with participants' accounts while they were still cognitively and analytically fresh. Rather than treating analysis and writing as sequential steps, I worked iteratively, engaging in rolling analysis that allowed coding, memoing, theme refinement, and drafting to inform one another in real time. This concentrated approach supported analytic continuity, minimized loss of contextual detail, and strengthened interpretive coherence across transcripts and themes. The accelerated timeline was made feasible by advance preparation completed during the proposal phase, including development of the interview guide, coding framework preparation, audit trail structure, and data management preparation. Although the schedule was compressed, analytic rigor was maintained through multi-cycle coding, systematic memoing, peer debriefing, member checking, and adherence to the documented audit trail. Completion of a full dissertation draft by February 3, 2026, reflects this intensive analytic engagement and sustained immersion in participants' meaning-making.

Summary

This study used a basic interpretive qualitative design to examine how Chief Diversity Officers (CDOs) in U.S. four-year institutions made meaning of their role conditions, specifically authority, resources, and reporting lines, and how those conditions intersected with leadership culture and external pressures. Guided by a constructivist epistemology, the design centered co-constructed meanings generated through semi-structured interviews and documented through reflexive memoing and a maintained audit trail (Lincoln & Guba, 1985; Maxwell, 2013; Saldaña, 2021). I analyzed transcripts using Braun and Clarke's (2006) six-phase thematic analysis, with credibility and trustworthiness supported through transcript member checking, systematic attention to disconfirming evidence, peer debriefing, and transparent documentation of analytic decisions (Lincoln & Guba, 1985; Maxwell, 2013; Saldaña, 2021). Following coding and cross-case analysis, I anchored interpretation in institutional theory, transformational leadership theory, and intersectionality to situate participants' accounts within broader scholarly conversations. These methodological decisions aligned the analytic process with the study's purpose and research questions and provided a rigorous and transparent pathway from participant narratives to defensible findings.

Chapter IV

Findings

Introduction

The purpose of this basic interpretive qualitative study was to explore how Chief Diversity Officers (CDOs) in U.S. higher education make meaning of their role conditions, including authority, institutional support, and the broader organizational contexts in which they work. Using semi-structured interviews, this study sought to understand how CDOs interpret their experiences in senior diversity leadership roles and how those interpretations inform their leadership strategies, perceptions of sustainability, and professional decision-making. Consistent with a basic interpretive approach, the focus of the study was not on measuring outcomes or testing theory, but on examining participants' meaning-making processes as they navigated complex institutional environments.

This chapter presents the findings derived from in-depth interviews with nine CDOs representing a range of four-year higher education institutions in the United States. Through a multi-cycle qualitative coding and analytic process discussed in Chapter Three, I discovered patterns of meaning across participants' accounts. These patterns are presented as themes that reflect shared role conditions while also attending to variation, tension, and boundary cases across institutional contexts. Rather than portraying a single or uniform CDO experience, the findings highlight both convergence and divergence in how participants understand and navigate their roles.

The chapter begins with an overview of participant and institutional context to situate the findings that follow. A brief summary of the data analysis process is then provided to orient the reader to how the findings were developed. The remainder of the chapter is organized by theme, with each theme illustrated through de-identified participant excerpts. I reserved interpretation of findings, integration with relevant literature, and discussion of implications for Chapter Five.

Participant Context

I interviewed nine participants, each serving in a senior diversity leadership role within a four-year institution of higher education in the United States. Consistent with the purposeful maximum-variation sampling strategy outlined in Chapter Three, I selected participants to reflect heterogeneity across institutional contexts and leadership environments rather than to achieve statistical representation. To protect confidentiality, I identify participants using pseudonyms and numeric identifiers (P1–P9) and present institutional characteristics in de-identified and aggregated form.

I recruited participants through multiple pathways approved by the Institutional Review Board. Four participants responded directly to the IRB-approved recruitment flyer, three participants came from my professional networks, and two participants emerged through snowball sampling referrals. I used snowball sampling selectively to supplement recruitment in recognition of the politically sensitive nature of senior diversity leadership roles and the limited accessibility of this population. Regardless of recruitment pathway, all participants met the same eligibility criteria and participated under identical study conditions.

Although I did not intentionally limit participation by race or ethnicity, all nine participants self-identified as Black. This outcome reflects the demographic composition of the participant pool accessible through my recruitment efforts and professional networks rather than a sampling restriction. While this homogeneity represents a limitation with respect to racial and ethnic diversity, it does not diminish the study's capacity to examine variation in meaning-making across institutional contexts. Participants represented diversity across other salient dimensions, including institutional type (public and private), institutional size and mission, geographic region, religious and non-religious affiliation, reporting structure, gender identity, and sexual or romantic orientation.

It is important to note that while the study included nine participants, the findings reflect experiences across thirteen distinct institutional contexts. Four participants drew upon their experiences serving as CDOs at more than one institution, and participants explicitly distinguished these institutional contexts during interviews. I treated these experiences analytically as separate contexts rather than collapsing them into a single narrative, allowing the study to capture how meaning-making may shift across organizational environments over time. Despite differences in institutional setting and role structure, all participants shared responsibility for advancing diversity, equity, inclusion, and belonging within their respective institutions. This shared role orientation provided a coherent foundation for cross-case analysis while preserving contextual variation central to a basic interpretive qualitative design. Table 1 presents a summary of participant characteristics and institutional contexts.

Table 1

Participant Characteristics and Institutional Context

Participant ID	Pseudonym	Race / Ethnicity	Gender	Institutional context	Role status
P1	Travis	Black	M	PT & PT, NE	C & F
P2	Joseph	Black	M	PB, S	C
P3	Dexter	Black	M	PB, S	C & F
P4	Anthonee	Black	M	PB, SE	F
P5	Bebe	Black/AC	W	PB, NE	C
P6	Dontavious	Black	M	PB & PB, MW & SE	F
P7	J'nae	Black	W	PT, NE	F
P8	Paul	Black	M	PT & PT, MW & MW	F
P9	Angie	Black/AA	W	PT & PT, MA & SE	F

Note. C is used to indicate currently in the CDO role and F is used to indicate formerly in the CDO role. PT is used to indicate a private institution and PB is used to indicate a public institution. For geographic region, NE is used to indicate northeastern, S is used to indicate southern, SE is used to indicate southeastern, MW is used to indicate midwestern, and MA is used to indicate mid-Atlantic. AC is used to indicate Afro-Caribbean, and AA is used to indicate African-American.

Overview of Data Analysis

I analyzed the interview data using a basic interpretive qualitative approach consistent with the study's design and research questions, as outlined in Chapter Three. My goal in analysis was to understand how Chief Diversity Officers make meaning of their role conditions rather than to test theory or generate generalizable claims. I approached analysis as an iterative and reflexive process, moving back and forth between interview transcripts, codes, and analytic memos to deepen my understanding of participants' interpretations. Throughout this process, I prioritized participants' language and meaning-making as the primary source of analytic insight.

During the first cycle of analysis, I coded interview transcripts using a combination of In Vivo and Values coding. In Vivo coding allowed me to foreground participants' own words and preserve their voice, while Values coding enabled me to capture beliefs, values, and attitudes related to authority, institutional support, legitimacy, and sustainability (Saldaña, 2021). I engaged in iterative review of transcripts and analytic memoing to refine code definitions and clarify analytic boundaries. This process resulted in the development and refinement of a Values codebook, which I ultimately locked as Version 1.2 to ensure consistency across transcripts.

For the second cycle of analysis, I used pattern coding and cross-case comparison to organize first-cycle codes into broader analytic categories. I examined patterns of convergence and divergence across participants, paying particular attention to variation by institutional context, role structure, and career stage. I refined analytic categories through additional memoing and the use of analytic matrices, which allowed me to systematically compare how participants made meaning of similar role conditions across different settings. I also intentionally retained boundary and disconfirming cases during this stage to avoid premature analytic closure.

Analytic memoing played a central role throughout both cycles of analysis. I wrote memos to document patterns, analytic questions, and decision points, as well as to reflect on how codes and categories evolved over time. These memos supported reflexivity and helped me track analytic movement from initial coding to category refinement and theme development. Figure 2 provides a sample excerpt analytic memo from the second cycle of analysis to illustrate how I documented pattern development and analytic decision-making. The full analytic memo is included in Appendix K to provide additional transparency into the analytic process.

Figure 2

Excerpt from Analytic Memo Illustrating Second-Cycle Pattern Development and Analytic Decision-Making

Core Content

1) Brief description of context
This memo documents the formal transition from first-cycle In Vivo and Values coding to second-cycle pattern coding. At this point in the process, two foundational artifacts have been completed and confirmed:

1. A comprehensive Values Code Inventory Table documenting the presence or absence of all Values codes from Codebook v1.2 across participants P1 – P9.
2. A Second-Cycle Pattern Coding Matrix (Grouped) that organizes the same set of Values codes into higher-order analytic categories to support cross-case comparison.

The purpose is not to generate themes or interpretations, but to establish a d bridge between first-cycle coding and deeper analysis by confirming code coverage and establishing an initial structure for pattern detection.

2) Interpretation
The inventory table and grouped matrix function as complementary controls for second-cycle analysis. The inventory table serves as a completeness and accountability mechanism. It confirms which Values codes are actually present in the dataset and prevents selective attention or premature narrowing of analytic focus.

The grouped matrix serves as an organizing device that helps with systematic cross-case comparison by clustering Values codes into provisional analytic categories. This organization supports early pattern recognition while intentionally stopping short of thematic claims.

Several early structural signals are visible at the matrix level:

- Authority-related conditions (e.g., authority limitation, informal authority, symbolic access) recur across nearly all cases, suggesting that constrained authority is a shared role condition rather than a context-specific anomaly.
- Sustainability and harm-related codes show both convergence (e.g., harm mitigation, ethical stewardship) and uneven distribution (e.g., moral exit /ethical self-preservation), which indicates potential differentiation across cases that may later function as boundary conditions.
- The retention of participant-level presence allows for identification of disconfirming or boundary cases in subsequent analytic steps.

These observations remain provisional and descriptive.

4) Decision taken (if any)
Three decisions are formalized at this stage:

1. The Values Code Inventory Table is treated as the locked record of Values code presence for this dataset (Codebook v1.2; P1–P9).
2. The Grouped Second-Cycle Matrix is adopted as the formal analytic starting point for second-cycle pattern coding.
3. No Values codes are collapsed, eliminated, or elevated to themes at this stage.

3) Competing explanations/rival interpretations
One alternative explanation is that the grouped categories impose structure too early, potentially shaping pattern recognition rather than revealing it. This concern will be evaluated during subsequent second-cycle analysis. A second alternative explanation is that high recurrence of certain Values codes reflects interview guide effects rather than shared conditions. This possibility will be assessed by examining whether recurring codes emerge in varied narrative contexts across participants rather than clustering around specific prompts.

5) Rationale for decision
Locking both the inventory table and grouped matrix at this point strengthens analytic rigor by ensuring that second-cycle work proceeds from a stable, auditable foundation.

From this multi-cycle analytic process, I developed a set of themes that reflect shared patterns of meaning across participants' accounts while preserving contextual variation. These themes form the basis of the findings presented in this chapter. To support transparency and trustworthiness, I maintained a detailed audit trail throughout analysis, including code inventories, analytic matrices, and memos documenting key analytic decisions. I include these materials in the appendices to allow readers to trace how findings emerged from the data. Specifically, a table illustrating the analytic progression from first-cycle Values codes to refined analytic categories and final themes is provided in Appendix L.

Themes

The findings presented in this chapter are organized around six themes that emerged through cross-case analysis of participants' interview data. These themes reflect shared patterns in how CDOs make meaning of their role conditions. While the themes capture points of convergence across participants' accounts, they also preserve variation and boundary cases shaped by differing institutional contexts and professional trajectories. Each theme is presented with analytic description and illustrated through de-identified participant excerpts to foreground participants' voices. These themes address the study's research questions by illuminating how CDOs interpret and navigate the structural and relational conditions of their roles within higher education institutions.

Theme One: Proximity Without Power as a Defining Role Condition

Across interviews, participants consistently described occupying positions that provided proximity to senior leadership without corresponding formal authority. Participants framed their roles as offering access, visibility, and relational influence while simultaneously limiting decision-making and enforcement power. They understood this condition as a structural feature of the CDO role rather than as a reflection of individual competence or commitment. This shared interpretation shaped how participants approached leadership, accountability, and institutional change.

Several participants explicitly distinguished between influence and authority.

Travis, a current CDO at a private institution in the Northeast, articulated this distinction directly when he stated, "DEI folks have influence," and then clarified the limits of that influence by adding, "That's all they really have." When discussing enforcement and accountability, Travis emphasized that formal disciplinary power typically resides outside the DEIB function, noting, "it's never the DEI folks that get to enforce accountability. It either has to be HR (Human Resources) or, you know, folks in student conduct." His account illustrates how proximity to institutional processes can coexist with limited capacity to enforce outcomes.

Participants also described how reporting structures created the appearance of authority while maintaining structural limits. Angie, a former CDO at private institutions in the Mid-Atlantic and Southeast, explained her position within senior leadership by stating, "I reported to the provost, and had a dotted line to the president's office." Despite this access, she distinguished clearly between positional location and enforceable authority. Angie noted, "what it was not was holding people accountable in the ways that I would have liked, where there would be accountability and consequences for lack of action. What I do feel that I had was a circle of influence." Her account emphasizes how institutional visibility does not automatically translate into accountability power.

Participants further described the limits of agency in practical and operational terms. J'nae, a former CDO at a private institution in the Northeast, explained that even when initiatives gained visibility, her ability to sustain or institutionalize them remained constrained. She stated, "I got the awareness out there, and that was as far as I could take it. Zero dedicated budget, zero dedicated staff, and very limited agency to just do what it is that you want to do." In her account, proximity to decision-makers did not compensate for structural constraints that restricted execution and long-term impact.

Paul, a former CDO at private institutions in the Midwest, similarly framed the role as one that required collaboration in the absence of formal authority. He explained, "we didn't really have authority, right? It was really, working with collaborative approaches." In Paul's account, collaboration functioned less as a leadership preference and more as a structural necessity shaped by limited positional power. He described relying on partnerships and shared influence to advance DEIB efforts rather than exercising independent authority. This meaning-making reinforces the broader pattern across cases, in which participants understood authority as contingent, negotiated, and relational rather than positional and enforceable, even when institutions formally recognized the DEIB function.

Collectively, these accounts illustrate how participants made meaning of the CDO role as structurally positioned near institutional power while lacking formal mechanisms to compel action or enforce accountability. Participants described relying on relationships, credibility, and influence to advance DEIB work while simultaneously interpreting authority limitations as a persistent constraint shaping the scope and limits of their leadership.

Theme Two: Resources Enable Action but Do Not Resolve Authority Constraints

Across interviews, participants described resources as shaping what they could attempt operationally without altering the authority structure that governed final decisions. I heard participants distinguish between having budgets, staff, or data access and having the power to define institutional priorities or require compliance. Resources influenced pace, scale, and visibility, but participants did not interpret resources as conferring decision rights. Participants framed resources as tools that enabled work to occur within boundaries already set by others.

Several participants described how limited budgets required constant strategic calculation rather than expansion of authority. BeBe, a CDO at a public institution in the Northeast, explained the material constraints of her role by stating, “How do you expect me to change the culture and climate of an institution when I have $6.73 per person each academic year, if you should calculate the budget.” She described responding to this constraint by relying on collaboration and co-sponsorship, explaining, “Can you co-sponsor? Can you put your name on this? Can you give us $500?” In her account, resources shaped creativity and partnership strategy, but they did not alter who ultimately controlled institutional priorities.

Other participants emphasized how modest funding constrained scope even when ideas aligned with institutional values. Dexter, a CDO at a public institution in the South, described working with “maybe a $10,000 budget line” and explained that the size of the budget forced him to abandon otherwise effective programming to respect the limits of a small budget. He stated, “If I bring in a speaker, I wouldn’t pay $5,000 for a speaker, because that’ll take half my budget.” Dexter interpreted resource limitation as a structural reality that shaped which initiatives remained possible, rather than as a temporary obstacle that authority could overcome.

Other participants also described how resource allocation signaled institutional seriousness without guaranteeing influence. Dontavious, a former CDO at public institutions in the Midwest and Southeast, reflected on his experience at a large R1 institution noting that his office operated with "probably $300,000 or $400,000" for a campus of "about 40-plus thousand students." He contrasted this with the perception that DEIB work appeared well funded overall for his division, explaining that "everybody's resources were mine," while his own office remained comparatively constrained. I interpreted his account as meaning-making that linked resource distribution to symbolic commitment rather than to actual authority over institutional direction. Although Dontavious' example reflects a large public R1 context, participants across institutional types described similar resource constraints. I did not observe a consistent pattern linking resource sufficiency to institutional classification, sector, or size. Instead, participants interpreted resource allocation as reflecting institutional prioritization and leadership commitment rather than structural characteristics associated with institutional type.

Across cases, participants made meaning of resources as necessary for execution, credibility, and survival, while recognizing that resources did not resolve authority constraints. Participants described using budgets, data, and partnerships to demonstrate impact and sustain activity, while continuing to rely on executive permission for structural change. Collectively, these accounts show that participants understood resources as enabling action within defined limits, rather than as mechanisms that redistributed power or decision-making authority within the institution.

Theme Three: Legitimacy Is Continuously Negotiated Through Translation and Performance

Participants described legitimacy as something they had to actively construct rather than something granted by title or position. They framed credibility as relational, contingent, and repeatedly tested through interaction with institutional stakeholders. Participants did not assume their analyses or recommendations would be accepted without an increased need for additional evidence or translation compared to their peer colleagues. I interpreted these accounts as meaning-making that positioned legitimacy as ongoing work rather than a stable condition of the CDO role.

Several participants emphasized the central role of data in establishing legitimacy, particularly when institutions resisted uncomfortable findings. Joseph, a current CDO at a public institution in the South, stated, “data is essential. You can't do work without data,” and he explained that “the data, qualitative and quantitative, tells a story.” He described the tension this created by noting, “we are hired to tell the university essentially how effed up they are,” while also recognizing that “people don't want to hear that, so they don't want to give the data.” I understood Joseph’s account as illustrating how legitimacy depends on evidence that institutions simultaneously demand and resist.

Participants also described legitimacy as something they performed through documentation and visibility of outcomes. BeBe explained that she routinely communicated results to the campus community, stating that “at the end of the semester, I just put out a report to the entire community…letting them know what we covered for the entire semester, so that they see the value of the work.” She connected this practice directly to resource advocacy when she stated, “I can pull back on this and say, look, we did this much with $10,000. But that wasn't enough.” I interpreted BeBe’s approach as legitimacy work that translated effort into institutional language that leaders recognized.

Participants also framed legitimacy as negotiated through collaboration rather than enforced through authority. Paul described using “a collaborative team approach to trying to get buy-in,” and he noted that “very rarely did I have to pull the authority card and say, I need this.” He framed collaboration as aligned with “the nature of higher education,” rather than as a personal leadership preference. In Paul’s account, legitimacy emerged through shared ownership and trust-building rather than positional power.

Other participants linked legitimacy to how institutions signaled seriousness through resourcing and scope alignment. Dontavious stated, “resources are everything, and I will tell you, it shapes for you how serious the institution or organization will take the work.” He described working at an institution with “about 40-plus thousand students,” while noting that “when you zeroed in on my specific office,” his budget remained relatively constrained. I interpreted his account as meaning-making that tied legitimacy not only to rhetoric or access, but to whether institutions materially aligned DEIB with their stated priorities.

Across cases, participants made meaning of legitimacy as labor that required continuous translation between DEIB priorities and institutional expectations. They described credibility as dependent on their ability to convert equity concerns into data, reports, and collaborative processes that institutional leaders recognized as valid forms of knowledge. Participants also interpreted legitimacy as fragile and contingent, requiring ongoing demonstration of value rather than resting on executive title or organizational placement. These accounts show that participants understood legitimacy as both a leadership responsibility and a structural burden, shaping how they framed recommendations, engaged stakeholders, and paced institutional change. In this way, legitimacy functioned as an interpretive lens through which participants navigated authority limitations while sustaining influence within institutional environments that repeatedly required justification of DEIB work.

Theme Four: External Pressures Shape Risk Tolerance and Strategic Choices

Participants described external political, legal, and cultural pressures as shaping how they assessed risk and determined which DEIB strategies felt viable. They framed these pressures as conditions they had to interpret and navigate rather than forces they could control or ignore. Participants did not describe risk tolerance as fixed, but as something that shifted in response to institutional climate, geography, and leadership posture. I interpreted these accounts as meaning-making that linked strategic choices to perceived exposure rather than to personal conviction.

Several participants connected risk tolerance directly to political context and geographic location. Dontavious explained that his authority and discretion depended heavily on environment, stating that “the two states I served in are both fairly conservative spaces,” and that in those contexts, “very little gets done without somebody’s permission.” He described this *somebody* as typically referring to someone else in senior institutional leadership, most often the president, whose decision-making was itself shaped by external legal, political, and cultural pressures. He described DEIB work as “very sensitive, touch-and-go,” which limited his ability to act independently even when he believed change was necessary. I understood his account as illustrating how external political climates narrowed the range of acceptable action and increased the perceived cost of missteps.

Participants also described legal exposure and public scrutiny as shaping how visible they allowed their work to become. Based on participants' accounts, I interpreted legal exposure and public scrutiny as related but analytically distinct pressures that often operate simultaneously. Participants' descriptions suggested that legal exposure centered on compliance, liability, and regulatory consequences, whereas public scrutiny reflected reputational, political, and stakeholder visibility risks that could arise even when actions remained legally permissible. Angie reflected on leadership caution by explaining that presidents and provosts operate under pressures that are often invisible, stating that "they have families and mortgages to pay, they have a board, they have legislative pressures." She emphasized that expecting leaders to "just be out there" failed to account for the risk calculus they navigated daily. In her account, external pressure did not eliminate DEIB commitment, but it altered how openly and forcefully that commitment could be expressed.

Other participants described how backlash risk influenced the pacing and framing of initiatives. Anthonee, a former CDO at a public institution in the Southeast, explained that even when presidential support existed, action outside those explicit priorities felt constrained, noting that "anything that hadn't been discussed yet, I was more timid around that." He connected that caution to politics rather than to lack of ideas or preparation. I interpreted his account as meaning-making where strategic restraint functioned as a survival mechanism rather than as disengagement.

Participants also described how external pressures reshaped decision-making through anticipation of response rather than direct intervention. Dexter explained that having “the ear of the president” allowed him to surface concerns, but he framed that access as limited in scope and carefully deployed. He described using programming and policy review as his primary avenues for action, rather than confrontation or mandate. Across cases, participants made meaning of external pressures as shaping when to advance, when to pause, and how to frame DEIB work in ways that minimized institutional risk while preserving momentum.

Theme Five: Sustainability Is Threatened by Accumulated Burden and Ethical Tension

Participants described sustainability as something they had to protect deliberately because the role accumulated and compounded burden over time, specifically the sustainability of their ability to remain effective, ethically aligned, and professionally viable in the CDO role. They framed exhaustion as a predictable outcome of layered expectations, not as an individual deficit. I heard them connect sustainability to the strain of doing DEIB work when institutions demanded results without aligning structures, staffing, or decision routines. I interpreted these accounts as meaning-making that located sustainability risk in chronic overload and unresolved ethical tension.

Participants emphasized staffing limitations as a key driver of unsustainable work conditions. Anthonee stated, “My biggest issue was resource of people,” and he explained that “everything was kind of… people are volunteering to do this, and you know, this is on top of their other job.” He described how the institution asked units to contribute through voluntary participation and then acknowledged, “you get different results when you have volunteers versus you have people who are paid to do something." I interpreted Anthonee's account as illustrating how sustainability breaks down when the institution treats essential DEIB functions as add-on labor rather than resourced work.

Participants also described sustainability as constrained by constant trade-offs that forced them to scale down or compromise. Dexter described how programming decisions became budget math, explaining, "hey, that'll take half my budget. Like, you know, I can't." He then named the consequence directly when he stated, "I just can't do that type of event." I understood Dexter's account as showing how sustainability depends on predictable capacity, because repeated limitation forces leaders to redesign work around scarcity rather than around mission.

Participants further described sustainability as threatened by instability and abrupt disruption, even in contexts where leaders had previously accessed support. Angie reflected on her own transition by stating, "our office was just closed in September," and she added, "I just ended my movement at the institution December 31st." She also named the emotional residue of that shift when she said, "I'm still processing." I interpreted Angie's account as meaning-making that tied sustainability to institutional continuity, because sudden closure disrupts both the work and the leader's ability to recover, reflect, and recalibrate.

Across cases, participants framed sustainability as a structural question rather than a personal endurance test. They described conditions that asked them to stretch beyond reasonable capacity while maintaining visible progress. They connected sustainability to the ethics of what they could responsibly promise and what they could realistically deliver. These aggregated accounts show that participants understood sustainability risk as the accumulation of overload, constrained choice, and instability that followed from persistent misalignment between DEIB expectations and institutional support.

Theme Six: Ethical Disengagement and Exit as Meaning-Making, Not Failure

Participants described disengagement and exit as deliberate responses to institutional conditions rather than as personal or professional shortcomings. They framed leaving or repositioning as a way to preserve integrity, protect well-being, and resist roles that constrained ethical leadership. Participants did not describe exit as abandoning DEIB commitments. I interpreted these accounts as meaning-making that positioned disengagement and exit as principled decisions grounded in accumulated experience rather than momentary frustration.

Paul described his departure from the DEIB space as a conscious decision shaped by role instability and shifting leadership conditions. He stated, “I’m currently not in the DEI space…well, I made a decision to leave out of that space and get back over into the academic affairs.” He connected that decision to structural volatility rather than to disinterest in the work. Paul explained that leadership changes disrupted continuity and clarity, which affected his ability to lead sustainably. I understood his account as framing exit as a recalibration toward conditions that allowed him to exercise leadership with consistency and ethical grounding.

J’nae described her disengagement as emerging from constrained authority and symbolic inclusion rather than from lack of commitment. She stated, “I was spayed… I was on a short leash.” She explained that her role limited her ability to advance meaningful accountability while maintaining the appearance of progress. J’nae also reflected on how leadership expectations shaped her interpretation of the role, stating that "they just wanted someone for window dressing." I interpreted her account as meaning-making that positioned exit as a refusal to participate in symbolic compliance without substantive authority.

Across the cases, participants framed exit as a boundary-setting act that clarified what they would and would not accept in order to lead with integrity. They described disengagement as an ethical response when institutional conditions repeatedly undermined authority, legitimacy, or sustainability. Participants did not frame leaving as failure, weakness, or inability to endure. These accounts show that participants made meaning of disengagement and exit as rational, values-driven responses to persistent misalignment between DEIB expectations and institutional support.

Summary

In this chapter, I presented six themes identified through cross-case analysis of participant interviews to illuminate how CDOs make meaning of their role conditions within higher education. Across accounts, participants consistently interpreted their roles as structurally constrained, relationally negotiated, and environmentally contingent. They did not frame their experiences as isolated challenges or individual shortcomings. Instead, they made meaning of their work through shared interpretations of authority, resources, legitimacy, external pressure, sustainability, and ethical boundaries.

Participants' accounts directly address RQ1 by showing how they interpreted authority, resources, reporting structures, and external pressures as interconnected role conditions that shaped both the scope and limits of their leadership. Theme One illustrates how participants made meaning of authority through the experience of proximity without decision-making power, which influenced how they approached accountability, coalition-building, and institutional influence. Theme Two clarifies how participants interpreted resources as operational enablers that allowed work to occur but did not alter decision authority or structural power. Theme Four extends these interpretations by demonstrating how external political, legal, and cultural pressures shaped participants' understanding of what actions were institutionally possible, safe, or strategically viable. These patterns show that participants did not interpret role conditions as isolated variables. Instead, they understood them as mutually reinforcing constraints and opportunities that required constant assessment, translation, and recalibration in order to move DEIB work forward.

The findings also address RQ2 by demonstrating how participants interpreted leadership culture in relation to legitimacy, influence, and strategy selection. Theme Three shows that participants constructed legitimacy through ongoing translation, documentation, and performance in order to gain credibility with institutional stakeholders. Theme One further contributes to RQ2 by showing how the absence of formal authority required participants to rely on relational and collaborative influence strategies rather than enforcement-based leadership. Theme Five connects leadership culture to sustainability by illustrating how participants evaluated whether institutional environments supported ethical and sustainable engagement in DEIB leadership. Participants described adjusting or abandoning strategies when leadership cultures required compromises that conflicted with their values, professional judgment, or capacity. These interpretations demonstrate that leadership strategies were not simply technical responses to institutional demands but were shaped by participants' ongoing assessments of legitimacy, influence, ethical alignment, and institutional receptivity.

Theme Six further extends both research questions by demonstrating how participants integrated their interpretations of role conditions and leadership culture over time when making decisions about persistence, disengagement, or professional redirection. Participants described exit, role transition, or recalibration not as abrupt or reactive responses, but as outcomes of sustained interpretation of authority limitations, legitimacy demands, institutional risk climates, and sustainability strain. I interpreted these accounts as illustrating how meaning-making operates longitudinally, revealing how participants evaluated whether continued engagement in the role remained professionally viable and ethically aligned with their values. Theme Six therefore shows that participants' leadership strategies were shaped not only by how they navigated institutional conditions, but also by how they ultimately determined when those conditions supported or constrained ethical and sustainable leadership practice.

The findings show that CDOs made meaning of their roles not simply through assigned responsibilities, but through how institutional actors responded to their work over time. Participants interpreted their experiences through recurring patterns of constraint, negotiation, adaptation, and boundary-setting. These interpretations shaped how they led, how long they remained in their roles, and how they ultimately defined success, sustainability, and integrity in DEIB leadership. In the next chapter, I build on these findings to examine how these meaning-making processes connect to the study's conceptual framework and existing scholarship and to consider their implications for DEIB leadership in higher education.

Chapter V

Conclusions, Implications, and Recommendations Overview of the Study

The purpose of this basic interpretive qualitative study was to explore how Chief Diversity Officers in U.S. higher education make meaning of their role conditions. I focused on how participants interpreted authority, institutional support, leadership culture, and the broader organizational contexts in which they worked. Rather than evaluating effectiveness or measuring outcomes, I centered this study on participants' interpretations of their experiences and how those interpretations shaped leadership strategies, perceptions of sustainability, and professional decision-making over time.

I designed this study to prioritize participants' meaning-making processes. I conducted semi-structured interviews with nine Chief Diversity Officers serving or formerly serving in senior diversity leadership roles at four-year institutions of higher education. Participants represented a range of institutional contexts, including public and private institutions, varying enrollment sizes, geographic regions, missions, and reporting structures. Several participants drew on experiences from more than one institution, which allowed this study to capture how meaning-making shifted across organizational environments rather than remaining fixed to a single setting.

I approached data analysis using a basic interpretive qualitative framework. I coded interview transcripts using In Vivo and Values coding to center participants' language, beliefs, and interpretations. I then engaged in pattern coding and cross-case analysis to identify shared meanings while preserving variation and boundary cases. Throughout analysis, I used analytic memoing to document interpretive decisions and to track how codes developed into analytic categories and final themes. This process allowed me to remain reflexive and intentional about how findings emerged from the data rather than imposing external explanations.

Chapter Four presents six themes that capture how participants made meaning of their role conditions. Participants consistently described roles marked by proximity to power without formal authority, uneven institutional support, and persistent external pressures. They also described legitimacy as something they had to actively construct and sustain, often through translation, collaboration, and performance. Over time, participants interpreted these conditions as shaping not only how they led, but also how they assessed sustainability, ethical boundaries, and decisions about disengagement or exit.

This chapter builds on those findings by shifting from description to interpretation. In this chapter, I examine how participants' meaning-making across the six themes reflects broader patterns in DEIB leadership and CDO scholarship. I also consider how these interpretations align with, extend, and complicate existing frameworks related to leadership, institutions, and power. Finally, I discuss the implications of these findings for practice, policy, and future research, with particular attention to how institutions design, support, and sustain senior diversity leadership roles.

Meaning-Making Across Findings

Across the six themes, participants made meaning of their roles through an ongoing process of interpretation rather than through fixed definitions of authority or success. They did not describe their work as a set of discrete challenges to be solved independently. Instead, they interpreted their role conditions as interconnected and mutually reinforcing. Authority limitations shaped how resources mattered. External pressures shaped how legitimacy could be expressed. Sustainability depended on how long participants could navigate these conditions without violating personal or professional boundaries. I understood participants' meaning-making as dynamic and cumulative, shaped by repeated interaction with institutional structures rather than by isolated events.

Participants consistently interpreted proximity to power as both an opportunity and a constraint. Access to senior leaders created visibility and influence, yet participants did not equate proximity with decision-making authority. This distinction became foundational to how participants understood their roles, particularly in shaping how they evaluated their scope of influence, defined realistic expectations for institutional change, and determined when collaboration, persuasion, or strategic sequencing were necessary to move initiatives forward. They learned to assess when their relational and strategic influence could move an issue forward and when structural limits would halt progress regardless of effort. Over time, participants described becoming more attuned to these boundaries and adjusting their strategies accordingly. As Travis summarized, "I can't make you do anything," which captured how participants interpreted influence as real but structurally bounded. Meaning-making, in this sense, functioned as a form of situational awareness that guided leadership choices.

Participants also made meaning of institutional support in ways that extended beyond the presence or absence of resources. Budgets, staffing, and data access mattered, but participants did not interpret these elements as indicators of authority. Instead, they treated resources as signals of institutional intent and seriousness. Participants learned to read resource allocation as symbolic as well as practical, shaping expectations about what kind of work would be supported and sustained. As Travis reflected, institutional investment communicated seriousness because, in his experience, “if this is a priority… put money into it.” I interpreted this statement as capturing how participants linked resource allocation to institutional signaling rather than to authority expansion. This interpretation influenced how participants planned initiatives, framed requests, and evaluated whether effort would result in lasting change.

Legitimacy emerged as a central interpretive thread across findings. Participants did not assume that their expertise or title guaranteed credibility. Paul similarly framed legitimacy as relational rather than positional, explaining that advancing DEIB work required “building collaborations” because he “sat in the middle” of competing institutional interests. Participants described legitimacy as something they had to earn, perform, and maintain through translation, evidence, and relationship-building. Participants interpreted resistance not simply as disagreement, but as feedback about how their role was positioned within institutional power structures. As a result, legitimacy work became a strategic and emotional component of leadership, shaping how participants communicated, documented outcomes, and engaged campus partners.

External pressures further shaped how participants interpreted risk and responsibility. Political climates, legal exposure, and public scrutiny influenced not only what participants attempted, but how they framed their work and when they chose restraint. Participants did not describe these pressures as abstract forces. They interpreted them through daily decision-making, leadership signals, and institutional responses to controversy. As Paul observed when describing shifting institutional climates, “now the money is not there, and the opposition is there,” which participants interpreted as requiring recalibrated strategy rather than abandonment of the work. As Joseph explained when describing moments when his usual advocacy strategies were blocked, “Usually, when there’s debate and there’s an opportunity to talk, I never go to win, I just go to have you maybe think about something differently… if I can give you just one nugget for you to think about, I don’t need to win.” This account illustrates how participants shifted their goals from immediate institutional change to incremental influence when structural or cultural resistance limited direct action. Meaning-making in this context involved constant recalibration, as participants weighed the potential impact against the potential fallout for themselves and their institutions.

Finally, participants made meaning of sustainability and exit as ethical considerations rather than personal limitations. They interpreted exhaustion, disengagement, and departure as outcomes of prolonged misalignment between expectations and support. Participants described learning when adaptation no longer served integrity or effectiveness. Exit, when it occurred, reflected a boundary-setting decision rooted in accumulated and compounded interpretation of role conditions rather than a single failure or disappointment. Travis described this boundary-setting directly, noting that under conditions of persistent misalignment, leaders sometimes reach a point where they “cannot just allow yourself to stay.” Across findings, meaning-making functioned as both a survival strategy and a moral compass, which guided how participants defined success, persistence, and leadership within structurally constrained roles.

Interpretation in Relation to Theoretical Frameworks and Literature

I interpret the findings of this study through institutional theory, transformational leadership theory, and intersectionality as sensitizing concepts that help situate participants' meaning-making within broader scholarly conversations on leadership, power, and organizational change. I do not treat these frameworks as causal explanations or as lenses that predetermine interpretation. Instead, I use them to clarify how participants understood their role conditions and how those interpretations align with, extend, and complicate existing literature on CDOs and DEIB leadership in higher education.

Institutional theory provides a useful framework for interpreting participants' consistent descriptions of proximity without power. Prior scholarship has noted that institutions often adopt diversity roles and structures to demonstrate legitimacy in response to external pressures rather than to redistribute authority internally (Meyer & Rowan, 1977; Scott, 2014). The findings of this study align with that literature, as participants repeatedly described roles that appeared structurally significant while remaining operationally constrained. Participants interpreted executive titles, cabinet access, and reporting lines as symbols that signaled commitment without guaranteeing decision-making authority. This interpretation reflects what Gonzales et al. (2018) described as symbolic inclusion, where diversity roles exist to satisfy normative expectations while remaining decoupled from core institutional power.

Institutional theory also helps interpret how participants made meaning of resources. While existing literature often frames budgets and staffing as indicators of institutional commitment to DEIB (Williams & Wade-Golden, 2013; Worthington et al., 2020), participants in this study did not interpret resources as proxies for authority. Instead, they read resource allocation as a signal of institutional seriousness that could coexist with limited influence. This finding complicates resource-centered narratives in the literature by showing that material support, when unaccompanied by authority, may reinforce symbolic compliance rather than enable structural change. Participants' interpretations suggest that legitimacy operates at the level of perception and signaling as much as at the level of capacity.

Transformational leadership theory offers a lens for understanding how participants responded to these structural conditions through leadership practice. Prior research has emphasized the importance of vision, moral purpose, and relational influence in advancing organizational change, particularly in contexts where formal authority is limited (Astin & Astin, 2000; Bass, 1985; Northouse, 2022). Participants' accounts align with this literature, as they described leading through collaboration, translation, and credibility rather than through positional power. Participants frequently described motivating stakeholders through shared institutional values, reframing resistance through dialogue, and translating DEIB priorities into language aligned with institutional mission, student success, or organizational effectiveness. They interpreted legitimacy as something they had to construct through evidence, relationships, and sustained engagement, which reflects transformational leadership's emphasis on influence grounded in trust and shared purpose.

At the same time, the findings extend transformational leadership scholarship by highlighting its limits under persistent structural constraint. Participants did not describe transformational practices as universally empowering or infinitely sustainable. Instead, they interpreted leadership culture as shaping how far vision and inspiration could carry DEIB efforts before encountering resistance, fatigue, or ethical tension. This interpretation complicates celebratory accounts of transformational leadership by foregrounding the conditions under which such leadership becomes burdensome rather than liberatory, particularly in roles marked by symbolic authority and uneven institutional backing.

Intersectionality provides a critical framework for interpreting how identity shaped participants' meaning-making of leadership culture, legitimacy, and risk. Existing scholarship has documented how leaders from marginalized social positions often experience heightened scrutiny, emotional labor, and contradictory expectations within organizational contexts (Crenshaw, 1989; Nixon, 2017; Wingfield, 2019). Participants' accounts in this study reflect these dynamics, as they interpreted their roles through awareness of how race, gender, and other identities shaped perceptions of credibility and authority. Participants did not describe identity as a separate layer added onto leadership. Instead, they interpreted identity as embedded within institutional structures and leadership culture, shaping how their actions were received and constrained.

Intersectionality also clarifies how participants made meaning of sustainability, disengagement, and exit. Prior research has noted that diversity leaders from marginalized backgrounds often bear disproportionate emotional and ethical burdens while navigating institutional resistance (Koffi, 2024). Participants in this study interpreted exhaustion and departure not as individual shortcomings, but as rational responses to environments that demanded representation, resilience, and transformation without corresponding authority or protection. This finding extends intersectional leadership scholarship by linking identity-based burden directly to ethical decision-making around persistence and exit.

Using institutional theory, transformational leadership theory, and intersectionality as interpretive guides allows the findings to be situated within existing scholarship without flattening participants' experiences into predetermined categories. The findings show that CDOs make meaning of their roles through ongoing interpretation of organizational design, leadership expectations, and social identity. These interpretations shape how they define influence, assess risk, pursue change, and decide when continued participation aligns with integrity. In this way, the study contributes to the literature by centering meaning-making as a critical process through which DEIB leadership is enacted, constrained, and, at times, ethically concluded.

Limitations of the Study

I recognize several limitations that shape how the findings of this study should be understood and applied. These limitations do not undermine the value of the study, but they do define its boundaries and inform how conclusions should be interpreted. I approach these limitations as part of transparent qualitative scholarship rather than as shortcomings to be minimized.

First, this study reflects the perspectives of nine Chief Diversity Officers, all of whom self-identified as Black. While this demographic outcome was not an intentional sampling criterion, it reflects the professional networks and recruitment pathways available to me. This homogeneity limits the study's ability to capture how CDOs from other racial or ethnic backgrounds may make meaning of similar role conditions. At the same time, this concentration allowed for deeper exploration of how race intersects with authority, legitimacy, and leadership culture, particularly given the racialized history of DEIB work in higher education. I therefore interpret this limitation as both a constraint and a source of analytic depth.

Second, the study relied on self-reported interview data, which reflects participants' interpretations of their experiences rather than objective accounts of institutional conditions. I did not seek to verify participants' descriptions through document analysis, observation, or triangulation with institutional records. Instead, I intentionally centered meaning-making as the unit of analysis. As a result, the findings illuminate how participants understood and interpreted their roles, not how institutions might describe those same conditions. This focus aligns with the study's basic interpretive design, but it limits the ability to make claims about institutional intent or effectiveness beyond participants' perspectives.

Third, participants described experiences across multiple institutional contexts, including prior roles at institutions where they no longer worked. While this approach enriched the data by capturing variation over time and setting, it also introduced the possibility of retrospective sense-making. Participants may have interpreted earlier experiences through the lens of subsequent roles, professional growth, or changed expectations. I treated these accounts as meaningful interpretations rather than as historical reconstructions, but this temporal distance may have shaped how participants framed past events.

Fourth, my positionality as a CDO and doctoral researcher influenced the study. I share professional identity and experience with participants, which facilitated rapport, trust, and depth of disclosure. At the same time, this positionality required sustained reflexivity to avoid assuming shared meaning or over-interpreting resonance between participants' accounts and my own experiences. I addressed this limitation through analytic memoing, codebook discipline, and intentional attention to disconfirming cases. Even so, my interpretations remain situated within my professional and scholarly standpoint.

Finally, this study does not aim to generalize findings across all higher education institutions or all Chief Diversity Officers. Institutional contexts vary widely in mission, governance, political exposure, and leadership culture, and these differences shape how CDO roles are designed and experienced. The role itself continues to shift in response to legal challenges, public scrutiny, and changing institutional priorities, which makes static conclusions inappropriate. For these reasons, the findings offer analytic insight rather than predictive claims about CDO experiences. Readers should consider how institutional context, governance structure, and leadership culture influence the extent to which these findings resonate with or diverge from other settings.

Recognizing these limitations strengthens the interpretive integrity of the study rather than diminishing its contribution. Naming the boundaries of the findings clarifies what the study can and cannot claim and prevents overextension of the analysis. These limitations also create space for future scholarship to engage the findings critically rather than treat them as definitive. By articulating these constraints, I provide a clearer foundation for future research to build on, extend, or complicate the interpretations presented here.

Implications for Practice and Policy

The findings of this study suggest several implications for how institutions design, support, and evaluate Chief Diversity Officer roles. These implications center on organizational structure, leadership expectations, and ethical responsibility rather than on individual skill, charisma, or resilience. Participants consistently interpreted their role conditions as products of institutional design, including reporting lines, authority structures, and decision-making norms. As a result, challenges commonly attributed to individual performance were more accurately understood as consequences of structural misalignment. This interpretation points to the need for changes at the policy and governance levels rather than continued emphasis on personal adaptability or perseverance. This finding aligns with scholarship suggesting that the effectiveness of CDO roles depends less on individual leadership traits and more on institutional authority alignment, reporting structure, and integration into decision-making processes (Williams & Wade-Golden, 2013; Worthington et al., 2020).

First, institutions should align CDO authority with role expectations in explicit and operational ways. Participants described proximity to senior leadership without decision-making power as a defining condition that shaped how far they could move DEIB work forward. Alignment may include clearly defined decision rights related to policy review, climate interventions, or escalation of equity concerns, rather than limiting the role to advisory input alone. Institutions might also specify when CDOs hold approval authority and when they function in partnership with other units, which can reduce ambiguity and prevent reliance on informal influence. Without such alignment, institutions risk maintaining the appearance of commitment while limiting the capacity for substantive change. Prior research similarly cautions that symbolic placement of diversity leadership roles without corresponding authority may result in limited organizational change despite visible structural investment (Gonzales et al., 2018; Williams & Wade-Golden, 2013).

Second, institutions should treat resources as part of a broader governance strategy rather than as stand-alone indicators of commitment. Participants did not interpret budgets or staffing as evidence of authority, but as signals of seriousness that could exist alongside constrained influence. For example, institutions might link DEIB funding to clearly articulated scope, authority, and assessment practices, rather than dispersing discretionary funds without governance clarity. Distinguishing between programming funds and operational authority can also help prevent the assumption that financial investment alone empowers the role. Policy decisions that integrate resources into strategic planning cycles may support more coherent and sustainable DEIB leadership. Scholars of diversity leadership have noted that resource allocation becomes most effective when tied to governance authority and accountability mechanisms rather than isolated programmatic funding, which often reinforces symbolic commitment without structural change (Williams & Wade-Golden, 2013; Worthington et al., 2020).

Third, senior leadership teams should recognize legitimacy work as a core function of the CDO role and account for its labor and cost. Participants described legitimacy as something they had to construct through documentation, data reporting, relationship-building, and translation across campus contexts. This work often included preparing reports, developing dashboards, facilitating difficult conversations, and mediating between competing institutional priorities. Institutions can respond by acknowledging legitimacy work in workload expectations, performance evaluations, and staffing models, rather than treating it as invisible or incidental labor. Doing so may help redistribute responsibility for institutional buy-in and reduce the burden placed solely on CDOs. Existing research has documented how diversity leaders frequently perform significant relational, translational, and emotional labor to build institutional credibility, often without formal recognition or workload redistribution (Nixon, 2017; Wingfield, 2019).

Fourth, institutions should attend to how external political, legal, and cultural pressures shape internal decision-making. Participants interpreted risk tolerance as responsive to environmental context rather than as a fixed leadership trait. Institutions operating in contested environments might clarify shared responsibility for public messaging, establish response protocols for DEIB-related controversies, or provide guidance that signals institutional backing rather than individual exposure. When institutions anticipate backlash and articulate collective positions, they reduce the pressure placed on CDOs to absorb risk alone. Policy clarity in this area can support more consistent and ethical decision-making. Institutional scholarship further suggests that organizations respond to external political and legal pressures through legitimacy-preserving strategies, which can result in responsibility for navigating those pressures being experienced at the individual leadership level unless governance structures explicitly distribute accountability (Meyer & Rowan, 1977; Scott, 2014).

Fifth, institutions should approach sustainability and retention of CDOs as ethical and structural issues rather than as matters of endurance. Participants described disengagement and exit as responses to prolonged misalignment between expectations and support. Institutions that seek to retain senior diversity leaders might evaluate staffing ratios, reporting stability, and role continuity alongside performance metrics. Examples include ensuring consistent reporting lines during leadership transitions, investing in sufficient staffing to match scope, and engaging in succession planning that signals long-term commitment. These approaches shift sustainability from individual stamina to institutional responsibility. Research on diversity leadership retention similarly emphasizes that turnover among CDOs is often linked to structural isolation, insufficient authority, and inconsistent executive support rather than individual leadership failure (Williams & Wade-Golden, 2013; Worthington et al., 2020).

These implications point to a central conclusion about DEIB leadership in higher education: responsibility cannot rest on individual effort alone. The findings show that authority, resources, legitimacy, risk, and sustainability function as interdependent conditions shaped by institutional design and policy choices. When institutions address these conditions intentionally and in relation to one another, they create space for DEIB leadership that is ethical, effective, and durable. This approach shifts the focus away from personal endurance and toward shared governance responsibility. Without such accountability, even well-supported CDOs remain constrained by systems that limit the possibility of sustained and meaningful change. These implications reinforce broader arguments within higher education scholarship to position diversity leadership as an enterprise-wide governance responsibility rather than as a specialized functional unit operating at the margins of institutional power (Gonzales et al., 2018; Williams & Wade-Golden, 2013).

Recommendations for Future Research

The findings of this study point to several directions for future research that could deepen understanding of Chief Diversity Officer roles and address gaps in the existing literature. While this study focused on how CDOs make meaning of their role conditions, participants' accounts also raised questions about pathways, trajectories, and institutional responsibility that warrant further scholarly attention. Future research can build on these insights to examine DEIB leadership as a career arc rather than as a bounded position.

First, future research should examine pathways into CDO roles across institutional contexts. Participants referenced a wide range of entry points, including faculty leadership, student affairs, legal and compliance work, and executive administration. These varied pathways shaped how participants interpreted authority, legitimacy, and readiness for the role. Comparative studies could explore how prior professional backgrounds influence how CDOs navigate institutional politics, engage senior leadership, and assess risk. Understanding these pathways may help institutions clarify hiring expectations and prepare leaders more effectively for the structural realities of the role.

Second, future research should investigate post-CDO career trajectories and professional mobility. Participants described CDO work as shaping how they evaluated future leadership roles, including movement into provost, president, or non-DEIB executive positions. Research that tracks career movement following CDO service could illuminate whether institutions treat DEIB leadership as a terminal role, a stepping stone, or a detour from executive advancement. Such studies may also reveal how experiences of symbolic authority, sustainability strain, and ethical tension influence decisions to remain in higher education leadership or exit altogether.

Third, future studies should explore how institutions prepare CDOs for leadership beyond the role itself. Participants implicitly raised questions about succession planning, mentorship, and executive development, particularly when DEIB roles lacked continuity or stability. Longitudinal research could examine whether institutions invest in leadership development for CDOs in ways comparable to other senior administrators. This line of inquiry may clarify how institutional investment signals whether DEIB leadership functions as integrated governance or as peripheral expertise.

Fourth, future research should more explicitly examine the relationship between institutional context and DEIB leadership risk. Participants described political climate, geography, and governing structures as shaping their strategic choices and tolerance for visibility. Comparative studies across states, systems, or institutional types could illuminate how external pressures condition internal leadership practices. Such research would help move beyond individual narratives of caution or boldness and toward structural explanations of risk.

Fifth, future research should attend more closely to identity, sustainability, and ethical exit within DEIB leadership. Participants framed disengagement and departure as reasoned responses to prolonged misalignment rather than as burnout alone. Qualitative studies that center ethical decision-making around persistence and exit may deepen understanding of how identity, institutional resistance, and leadership culture interact over time. This work could also inform how institutions evaluate success, retention, and responsibility in senior diversity leadership roles. This line of inquiry may clarify how institutional investment signals whether DEIB leadership functions as integrated governance or as peripheral expertise, while also raising questions about how identity shapes who is positioned to carry this work across institutional contexts.

Finally, future research should examine how racial and ethnic identity beyond Black CDO experiences shapes meaning-making, leadership strategy, and sustainability within the role. While this study included participants who identified across multiple identities, several participants described how race and ethnicity shaped perceptions of legitimacy, scrutiny, and emotional labor in ways that warrant deeper comparative analysis. Comparative qualitative studies that center the experiences of CDOs representing a broader range of racial and ethnic identities may clarify how identity intersects with institutional context, leadership culture, and stakeholder expectations. Such research could illuminate both shared structural challenges and identity-specific pressures that influence how CDOs interpret authority, risk, and credibility. Expanding scholarship in this area may strengthen intersectional understanding of DEIB leadership by examining how different racialized leadership experiences shape strategic decision-making, persistence, and professional mobility within higher education.

Future research that attends to these directions can shift how DEIB leadership is studied and understood within higher education. Rather than treating the CDO role as a static position, scholars can examine it as a dynamic leadership process shaped by entry pathways, institutional conditions, identity, and exit decisions over time. This orientation invites deeper inquiry into how meaning-making evolves across a CDO's professional arc and how institutions influence that trajectory through design and support. Expanding research in these areas can generate knowledge that not only explains CDO experiences, but also informs more ethical, intentional, and sustainable approaches to DEIB leadership development and governance.

Concluding Reflections

I entered this study with a professional commitment to DEIB leadership and a scholarly interest in how Chief Diversity Officers interpret their roles within complex institutional environments. Through this research, I came to understand that CDOs do not simply respond to role expectations as written or stated. They make meaning of their work through sustained interaction with institutional structures, leadership cultures, and external pressures that shape what feels possible, ethical, meaningful, and sustainable. This study affirmed that meaning-making is not ancillary to DEIB leadership. It is central to how CDOs assess authority, define influence, and decide how long and in what ways they can remain engaged in the work of DEIB leadership.

Listening closely to participants clarified that many of the challenges attributed to individual capacity or leadership style are better understood as outcomes of organizational design. Participants did not describe confusion about their personal mission or lack of commitment to equity and inclusion. Instead, they described institutions that positioned them close to power without granting authority, provided resources that ranged from scarce to substantial without governance clarity, and expected legitimacy without shared responsibility. These conditions required constant interpretation and recalibration, which shaped how participants understood leadership success, risk, and integrity over time.

This study also deepened my understanding of sustainability and exit as ethical dimensions of leadership rather than as endpoints of failure. Participants framed disengagement and departure as moments of clarity about what they could or would no longer justify under misaligned conditions. These reflections challenge dominant narratives that equate perseverance with effectiveness and highlight the need for institutions to examine how their structures invite or foreclose ethical leadership. In this way, the findings call attention to institutional accountability as much as to individual decision-making.

As a scholar practitioner, I leave this study more attentive to the ways meaning-making mediates between structure and action. CDOs do not operate within neutral systems. They interpret signals, assess boundaries, and weigh consequences as part of their daily leadership practice. By centering meaning-making, this study contributes a lens that honors the complexity of DEIB leadership while resisting oversimplified explanations rooted in personality, resilience, or technical skill alone. This orientation also reinforces the need to study leadership not only through outcomes, but through the interpretive processes leaders use to navigate constraint and possibility.

I conclude this dissertation with a belief I have often articulated in my practice as a Chief Diversity Officer: CDOs are not meant to function as DEIB firefighters, responding to crises as they arise. Rather, they are meant to serve as DEIB strategists, providing leadership that mitigates the incendiary conditions that produce those crises in the first place. Advancing DEIB leadership, therefore, requires more than commitment or rhetoric. It requires institutions to confront how authority, legitimacy, risk, and sustainability function in practice. By foregrounding how CDOs make meaning of their roles, this study offers insight into why DEIB leadership remains both essential and precarious within higher education, and why structural change remains necessary for ethical and enduring progress. I hope this work encourages institutions and scholars alike to attend more seriously to the conditions they create and sustain for CDOs, and to the leadership choices those conditions make possible or impossible over time.

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Appendix A:

Semi-Structured Interview Protocol & Guide

A Qualitative Study Examining How Chief Diversity Officers Make Meaning of Their
Role Conditions in U.S. Four-Year Institutions

Note on terminology:

In this appendix, the interview guide refers to the content of the interview, which is the sequence of core and optional questions aligned to research questions and data needs. T interview protocol refers to the procedures that standardize administration across participants, including logistics, scripts, consent steps, reminders, and recording notes. Appendix A includes both the guide (question table with alignment) and the protocol (brief header and procedural steps).

Protocol Header (complete before each interview)

Participant pseudonym	
Date	
Time (and time zone)	
Duration	
Notes / confidential details (if needed for organization)	

Purpose refresher (for interviewer): To explore how senior CDOs make sense of their role conditions, leadership culture, perceived influence/legitimacy, and the strategies they report using.

RQ ↔ Data Needed ↔ Question(s) ↔ Probes (Crosswalk)

Research Question	Data needed (concepts/constructs)	Question(s) / item(s)	Typical probes (examples)
RQ1: How do CDOs make meaning of role conditions (authority, resources, reporting lines) and external pressures?	Decision rights; budget/staff/data access; reporting proximity; external accountability/pressure episodes; critical incidents; sensemaking language.	Q1–Q5	"Could you share a specific instance…?" "What happened next?" "Who was involved?" "What

			constraints did you navigate?”
RQ2: How do CDOs make meaning of leadership culture, perceived influence/legitimacy, and what strategies do they report using?	Descriptions of local leadership culture; perceptions of legitimacy/influence; strategies/tactics; exceptions/boundaries of approach.	Q6–Q8	“How would you describe…?” “When does your usual approach not work?” “How did you adjust?” “What did this teach you?”

Interview Guide (core questions with prompts; probes are flexible and non-leading) Label Key:

- **WO = Warm-up/context question**
- **C1 = Member-checking prompt**

Data (data needed to answer RQs; indicate alignment)	**Question**	**Potential Probing Questions I Might Ask**
Context to situate later answers (applies to RQ1 & RQ2). Reporting line, cabinet status, office size.	W0. To get us started, could you tell me a little about your current (or most recent) role and where it sits in the institution?	Who do you report to? Do you sit on cabinet or an executive leadership team? How many staff report to you? What units fall in your portfolio? What is one responsibility people often assume you have but you don’t?
Authority / decision rights; meaning-making about power and scope (RQ1).	Q1. When you think about authority in your role, what does that mean to you here? How have you come to that understanding?	What decisions can you make without additional approval? Can you give an example of an approval that was granted? An approval that was denied? Who can override your decisions? When was the last time you exercised budget or policy authority? What signals tell you your authority is recognized? Can you recall a moment when you felt your authority

		was unexpectedly reinforced?" (Then ask them to walk you through that) Can you recall a moment when authority was undermined in ways you did not anticipate?" (Then as them to walk you through that)
Resources (budget, staff, data access); sufficiency and trade-offs (RQ1).	Q2. How do resources (budget, staff, data access) shape the way you experience your role?	What is your approximate operating budget and staffing level? In the last year, what did you not do because of resource limits? What would "enough" look like for your office? What data systems or dashboards do you have access to, and how do you use them? Describe one concrete trade-off you made.
Reporting lines / proximity to leadership and implications for scope and influence (RQ1).	Q3. How do your reporting lines and proximity to senior leadership influence how you understand your scope and influence?	How often do you meet with the president/provost? Who sets your goals? Can you place items on cabinet agendas? Describe one time proximity helped you move something forward. One time distance limited you. What are your escalation paths when you hit resistance? If you had to choose one place where resource constraints most shape your daily decisions, what would it be? (and why)
External pressures (state policy, donors, media, boards) and sensemaking about constraints/opportunities (RQ1).	Q4. What external pressures matter most in your setting, and how do they factor into how you see your role?	Tell me about a recent policy, donor, media, or board issue you navigated. How did it shape your choices? What constraints did you perceive? What opportunities did you see? How, if at all, did you adjust your messaging or strategy?

		Can you walk me through how you weighed risks when responding to that external pressure? Which external actors feel most consequential to your choices?" (Then as "why").
Critical incident integrating role conditions and pressures (RQ1).	Q5. Critical incident: Tell me about a specific episode this past year when your role felt particularly enabled or constrained. How did you interpret what was happening?	Who was involved? What decision points did you face? What actions did you take first, second, and third? What were the outcomes and unintended consequences? What did you learn about the role from this episode? If you could redo it, what would you change?
Leadership culture; perceived influence/legitimacy (RQ2).	Q6. How would you describe the leadership culture around you? In what ways does it shape how legitimate or influential you feel in this role?	What are the informal rules for getting work done here? How are conflict and disagreement handled? Where does trust show up—or not? Tell me about a moment you felt particularly legitimate, and one when you did not. What explained the difference?
Reported strategies/tactics used to move work forward (RQ2).	Q7. Thinking about that understanding of culture, what strategies do you find yourself using to move work forward?	Walk me through a recent strategy you used (e.g., coalition-building, sequencing, reframing). Why that choice in that context? What did you communicate to whom and in what order? What indicators told you it was working? What pushback did you encounter? What is a strategy you rarely use, and why?
Exceptions/boundaries of usual approach; adaptive sensemaking (RQ2).	Q8. When does your usual approach not work here? What does that tell you about the role or the culture?	Describe a specific time your go-to strategy failed. How did you adjust in the moment? What constraints do you now accept versus challenge?

		What signs tell you to switch tactics?
Member check to enhance descriptive validity; alignment to RQs (closing; applies to both RQs).	C1. Here's what I think I heard as most important today… What have I not asked that you would like to share/that you feel is important context for me to know about your experience as a CDO?	If I summarized your role conditions in one or two sentences, would this be fair? Are there examples you would prefer I mask or generalize? Is there anything you want to add or correct before we wrap?

Generally useful prompts and elicitations

- Silence: Pauses suggest to the interviewee that you want them to continue talking.
- Seeking elaboration: "What did you mean…?" or "Can you give more detail…?"
- Probing for details: "Do you have any examples?" or "Could you say more about…?"
- Specifying questions: "What happened when you said that?" or "What did they say next?"
- Reflecting meaning: "Do you mean that…?" or "Is it correct that…?"
- Reflecting emotion: "You sound [emotion] when you say that." or "Is it correct that you feel [emotion]…?"

Member-checking: Paraphrase checklist (use at closing)

- Summarize main data needed for RQ1 (role conditions & external pressures): _________
- Summarize main data needed for RQ2 (leadership culture, perceived influence/legitimacy, strategies): ____
- Clarify any contradictions, exceptions, or boundary conditions noted: ____

Notes on terminology and fit

I use "consistent coverage," in line with a basic interpretivist approach prioritizing meaning-making over formal cross-case comparison. Probes emphasize concrete episodes and participants' interpretations, consistent with the purpose and RQs.

Appendix B:

IRB Exemption Letter

Docusign Envelope ID: 2133051E-DF23-4AB2-97AE-6B48FC3F8CEB

Institutional Review Board (IRB)
for the Protection of Human Research Participants

PROTOCOL EXEMPTION REPORT

Protocol Number: 04680-2025

Responsible Researcher(s): Maurice D. Nelson

Supervising Faculty: Dr. Daesang Kim

Dissertation Research Member: Dr. Matthew Smith

Project Title: *Navigating the Margins of Power: A Qualitative Study Examining How Chief Diversity Officers Make Meaning of Their Role Conditions in U.S. Four-Year Institutions.*

Institutional Review Board Determination:

This research protocol is **exempt** from Institutional Review Board (IRB) oversight under 45 CFR 46.101(b) of the federal regulations, **category 2**. If the nature of the research changes such that exemption criteria no longer apply, please consult with the IRB Administrator (irb@valdosta.edu) before continuing your research study.

Comments:

- *IRB protocol approval number (IRB-04680-2025) must be included at the end of consent statements, correspondence, recruitment documents, etc.*
- *Qualtrics settings must allow participants to skip or decline to answer questions. Additionally, the settings must be configured to prevent the collection of IP addresses.*
- *Pseudonym lists must be kept in a separate, secure file for corresponding data.*
- *Interviews may be recorded to create an accurate transcript. However, it's important to note that the guidelines strictly prohibit collecting, storing, and/or sharing the recordings. Therefore, it is imperative that once the transcript is created, the recorded interview session must be deleted immediately from all recording and storage devices used. This measure is to uphold confidentiality and ensure that the sensitive information contained in the recordings is adequately protected.*
- *To comply with consent guidelines, recordings must capture the researcher reading the consent statement aloud and confirming the participant's understanding and willingness to participate. Each transcript must document the consent process and the participant's voiced consent. A copy of the interview consent statement must be provided to each participant.*
- *Upon completion of the research study, all data must be securely maintained (e.g. locked file cabinet, password-protected computer, etc.) and accessible only by the researcher for a minimum of 3 years. At the end of the required time, collected data must be permanently destroyed.*

☒ ***Proposed modifications must be submitted to the IRB Administrator at tmwright@valdosta.edu for review and approval. Implementing any modifications without written approval from the IRB is strictly prohibited.***

Elizabeth W. Olphie 12.17.2025

Elizabeth W. Olphie, IRB Administrator Date

Thank you for submitting an IRB application.

Please direct questions to irb@valdosta.edu or 229-259-5045.

Revised: 06.02.16

Appendix C:

Participant Recruitment Flyer Copy and Image

Study Title: Navigating the Margins of Power: A Qualitative Study Examining How Chief Diversity Officers Make Meaning of Their Role Conditions in U.S. Four-Year Institutions

Purpose: To understand how CDOs interpret their role conditions and how those interpretations inform the strategies they report using in their work.

Who can participate: Senior-most, institution-wide CDO (or equivalent) at a U.S. four-year institution; currently serving or served within the past 5 years; at least one year in role; able to interview in English.

What participation involves: One Zoom interview (60–90 minutes) with an optional 15–30 minute follow-up; audio-recorded and professionally transcribed; you may review your transcript.

Confidentiality & voluntariness: Your identity and institution will be de-identified in reports. Participation is voluntary; you may skip questions or withdraw at any time.

Researcher role: I am contacting you only as a researcher, not as a supervisor, consultant, or evaluator. Nothing will be shared with your institution.

Interested? Please complete the 5-minute **screening form**: [link/QR].

Questions? Contact me via email or direct message. Email: maunelson@valdosta.edu

IRB: Approved by Valdosta State University IRB, Protocol #.

For questions about your rights as a participant, contact (IRB contact).

Accessibility notes: include alt text for the image, high-contrast colors, and the full screening URL in text under the QR code.

VALDOSTA STATE
UNIVERSITY

PARTICIPATE IN MY RESEARCH

My name is Maurice D. Nelson, and I am a doctoral candidate at Valdosta State University pursuing a Doctor of Education in Leadership with a Concentration in Higher Education. Please consider participating in or nominating someone for my confidential study.

Study Title

Navigating the Margins of Power: A Qualitative Study Examining How Chief Diversity Officers (CDO) Make Meaning of Their Role Conditions in U.S. Four-Year Institutions

Purpose

To understand how CDOs interpret their role conditions and how those interpretations inform the strategies they report using in their work.

Who Can Participate?

Senior-most, institution-wide CDO (or equivalent) at a U.S. four-year institution; currently serving or served within the past 5 years; at least one year in role; able to interview in English.

What to Expect?

One Zoom interview (60–90 minutes) with an optional 15–30 minute follow-up; audio-recorded and professionally transcribed; you may review your transcript.

Key Information

- **Confidentiality & voluntariness:** Your identity and institution will be de-identified in reports. Participation is voluntary; you may skip questions or withdraw at any time.
- **Researcher role:** I am contacting you only as a researcher, not as a supervisor, consultant, or evaluator. Nothing will be shared with your institution.
- **Interested?** Please complete the quick screening form: [link/QR].
- **IRB:** Approved by Valdosta State University IRB, Protocol #.

SCAN ME

Questions? Contact me via direct message or email at maunelson@valdosta.edu

Appendix D:

Participant Recruitment Invitation Email

Subject: Invitation to participate in a study on CDO leadership in U.S. higher education Dear

[Name],

My name is Maurice Nelson, and I am conducting a dissertation study on how Chief Diversity Officers (CDOs) in U.S. four-year institutions make meaning of their role conditions and how those interpretations inform the strategies they report using in their work. I am contacting you as a researcher (not as a supervisor, consultant, or evaluator). Participation is voluntary and highly confidential.

If you are eligible and interested, the study involves:

- One Zoom interview (60–90 minutes), with an optional brief follow-up (15–30 minutes);
- Audio and video recording and professional transcription for accuracy;
- The opportunity to review your transcript.

Eligibility: Senior-most, institution-wide CDO (or equivalent title) at a U.S. four-year institution, currently serving or served within the past five years, with at least one year in the role, and able to interview in English.

If you are open to participating, please complete the brief screening form here: [link] (5 minutes). I will follow up to discuss my confidentiality protocols and to schedule the interview at your convenience.
Thank you for considering this request. I'm happy to answer any questions.

Warm regards,
Maurice Nelson,
Doctor of Education in Leadership Candidate
Valdosta State University
IRB Protocol # 04680-2025

Appendix E:

Participant Screening Form

Purpose: confirm eligibility and capture context fields for maximum-variation sampling.

Confidentiality Note: Screening responses are used only to determine eligibility and schedule interviews. If you enroll, your name and institution will be replaced with a pseudonym in all research files and reports. The only document that links real names to pseudonyms is a password-protected spreadsheet stored separately from study data on the researcher's password-protected, full-disk–encrypted laptop (MacBook Pro with built-in encryption), not synced to any cloud service. Only the researcher will have access.

If you are not eligible or choose not to participate, your screening information will be deleted within 30 days. For enrolled participants, direct identifiers (name, institution, email) will be kept only as needed to schedule, conduct member checks, and manage consent; afterward, identifiers will remain solely in the separate linkage file. In accordance with VSU IRB policy, identifiable records will be retained for a minimum of three years after study completion and then securely destroyed (the linkage file and any remaining identifiers will be permanently deleted).

1. **Are you the senior-most, institution-wide leader for DEIB at your institution?** ☐ Yes ☐ No (if No, end)
2. **Institution name: ____________________________**
3. **Institution type (control):** ☐ Public ☐ Private not-for-profit ☐ Private for-profit
4. **Carnegie classification (self-report):** ☐ Baccalaureate ☐ Master's ☐ Doctoral ☐ (R1/R2) ☐ Other: ____________
5. **Have you served at least one continuous year in the CDO (or equivalent) role?** ☐ Yes ☐ No (if No, end)
6. **Service window:** ☐ Currently serving ☐ Served within past five years (end year ____)
7. **Primary reporting line:** ☐ President/Chancellor ☐ Provost ☐ SVP/EVP ☐ Other: ____________
   Cabinet status: ☐ Member of president's/provost's cabinet ☐ Not a member
8. **Approximate student enrollment band:** ☐ <5k ☐ 5–10k ☐ 10–20k ☐ 20–40k ☐ >40k
9. **Region:** ☐ Northeast ☐ Midwest ☐ South ☐ West ☐ Other U.S. territory: ________
10. **Willing to be interviewed in English over Zoom?** ☐ Yes ☐ No
11. **Optional identity items** (you may skip):
    1. Gender identity: ____________
    2. Racial/ethnic identity: ____________

____

13. **Best email and phone for scheduling: ______________________________**
14. **Referral** (if any): **______________________________**

Eligibility statement shown at submit: "Thank you. If you meet the criteria and align with the sampling plan, I will contact you to schedule."

Appendix F:

Recorded Interview Consent Statement

You are being asked to participate in an interview as part of a research study entitled "Navigating the Margins of Power: A Qualitative Study Examining How Chief Diversity Officers Make Meaning of Their Role Conditions in U.S. Four-Year Institutions," which is being conducted by Maurice D. Nelson, a doctoral student at Valdosta State University. The purpose of the study is to explore how Chief Diversity Officers (CDOs) make meaning of their role conditions, leadership culture, and external pressures, and how those interpretations inform the strategies they use to navigate their work. You will receive no direct benefits from participating in this research study. However, your responses may help us learn more about how Chief Diversity Officers understand their roles and responsibilities, how they make sense of the challenges and supports within their institutions, and how those experiences can guide colleges and universities in better supporting diversity leadership and inclusion efforts. There are no foreseeable risks involved in participating in this study other than those encountered in day-to-day life.

Participation should take approximately 60-90 minutes. The interviews will be audio taped in order to accurately capture your concerns, opinions, and ideas. Once the recordings have been transcribed, the tapes will be destroyed. No one, including the researcher, will be able to associate your responses with your identity. Your participation is voluntary. You may choose not to participate, to stop responding at any time, or to skip any questions that you do not want to answer. You must be at least 18 years of age to participate in this study. Your participation in the interview will serve as your voluntary agreement to participate in this research project andyour certification that you are 18 years of age or older.

Questions regarding the purpose or procedures of the research should be directed to Maurice D. Nelson at maunelson@valdosta.edu. This study has been exempted from Institutional Review Board (IRB) review in accordance with Federal regulations. The IRB, a university committee established by Federal law, is responsible for protecting the rights and welfare of research participants. If you have concerns or questions about your rights as a research participant, you may contact the IRB Administrator at 229-253-2947 or irb@valdosta.edu.

Appendix G:

Pre-Interview Protocol

Study title: *Navigating the Margins of Power: A Qualitative Study Examining How Chief Diversity Officers Make Meaning of Their Role Conditions in U.S. Four-Year Institutions*

Purpose (for your awareness): This study explores how Chief Diversity Officers (CDOs) make meaning of their role conditions, leadership culture, and external pressures, and how those interpretations inform the strategies they use to navigate their work.

1) Session logistics

- **Format:** Conversational, semi-structured interview on Zoom (**audio and video recorded**).
- **Duration:** 60–90 minutes (with an optional 15–30-minute follow-up if needed).
- **Calendar invite:** Includes Zoom link, date/time (with time zone), and contact information.
- **Recording:** Audio and video are captured to support accurate transcription and analysis.

2) Consent, confidentiality, and your rights

- You will receive and sign an **IRB-approved consent form** before the interview.
- Participation is **voluntary**; you may decline any question or stop at any time.
- **Confidentiality:** Pseudonyms will be used in transcripts and reports; institutions will be masked with de-identified codes. Potentially identifying details in examples will be generalized in reporting.
- **Data protection & retention:** Audio/video files will be stored on an encrypted, access-restricted drive, used solely for research purposes, and deleted within the IRB-approved retention window. Only the researcher will have access. De-identified transcripts will be retained per IRB requirements.

3) Non-evaluative role of the researcher: I am contacting you solely as a researcher. I am not evaluating you or your office, and nothing will be shared with your institution. The goal is to examine how you make sense of your role and context in your own words.

4) What to expect in the conversation

Questions invite reflection on:

- **Role conditions:** authority/decision rights, resources (budget, staff, data), reporting lines/proximity to senior leadership.
- **External pressures:** e.g., state policy, donors, media/boards.
- **Leadership culture:** norms, trust, change readiness, conflict approaches.
- **Strategies you report using:** coalition-building, framing/communication, sequencing, boundary-spanning, escalation choices.

Interviews emphasize ***concrete episodes*** *and your interpretations; there are no right answers and* ***no preparation is required****.*

5) Optional pre-reflection prompts (no submission needed)

If helpful, you may think about:

- One **recent episode** in which your role felt particularly **enabled or constrained**, and what you took from that experience.
- A **current external pressure** that shaped how you understood or enacted your role.

6) Technology and accessibility

- Please join from a **quiet location**; a headset can improve audio quality.
- If you need **accessibility accommodations** or a **schedule change**, email in advance so we can adjust accordingly.

7) Contact

- **Researcher:** Maurice Nelson, Valdosta State University
- **Email:** mauricen86@gmail.com **Phone:** 912-441-6854

Questions regarding the purpose or procedures of the research should be directed to ***Maurice Nelson*** *at* ***maunelson@valdosta.edu****. This study has been approved by the Valdosta State University Institutional Review Board (IRB) for the Protection of Human Research Participants. The IRB, a university committee established by Federal law, is responsible for protecting the rights and welfare of research participants. If you have concerns or questions about your rights as a research participant, you may contact the IRB Administrator at 229-253-2947 or irb@valdosta.edu.*

Appendix H:

Participant Recruitment Invitation Reminder

Email Subject: Reminder: study on senior CDO leadership (dissertation)

Hello [Name],

I'm following up on my invitation to participate in my study of senior CDO leadership at U.S. four-year institutions. Participation is voluntary and confidential and involves one 60–90-minute Zoom interview.

If interested, please complete the 5-minute screening form: [link].
If now is not a good time, a brief reply is appreciated either way.

Thank you.

Best,
Maurice Nelson

Appendix I:

Pilot Interview Email Invitation Template

Subject: Invitation to pilot an interview guide (45-60 minutes) Dear [Name],

I'm refining the interview guide for my dissertation study on Chief Diversity Officers' experiences. I'm writing to ask if you would be willing to participate in a brief pilot interview to help me test question wording, flow, and timing.

What this involves:

- One Zoom conversation (about 45-60 minutes).
- Focus is on feedback about the questions, not your personal experiences or views.
- Your feedback will help me improve clarity, sequencing, and probe options.

Important notes:

- Pilot data will not be included in the study's analysis or findings.
- Participation is voluntary and you may skip any item or stop at any time.
- I will follow the same confidentiality practices as the main study:
    - No recording will occur unless you agree. If you consent to recording, audio/video will be used only to refine the guide.
    - Any recording will be stored on my password-protected, full-disk-encrypted MacBook Pro, not synced to any cloud service, and accessible only to me. It will remain in a locked cabinet in my office when not in use.
    - Pilot notes will be de-identified; names and institutions will not appear in study materials.
    - Names will be replaced with a pseudonym in any internal notes; the name–pseudonym link is kept in a separate, password-protected spreadsheet on the same encrypted laptop, accessible only to me.
    - If you participate, any pilot recordings (if made) will be deleted once the interview guide is finalized; pilot consent forms will be retained for at least three years per IRB policy.
    - Pilot and study interviews use my university-licensed Zoom with a waiting room and passcode.

If you're open to helping, please reply with a few available times over the next two weeks. I'll then send a short pilot-specific consent form and a Zoom link.

Thank you for considering this request. Your feedback will directly strengthen the quality and clarity of the study materials.

Warmly,
Maurice D. Nelson

Appendix J:

Analytic Memo Template

Memo Header

- **Date & time:** ______________________________
- **Memo type** *(select one)*: ☐ Contact ☐ Coding ☐ Integrative ☐ Interpretive ☐ Method ☐ Reflexive
- **Participant /transcript ID:** ______________________________
- **Triggering event:** *(e.g., "post-interview P07," "first-cycle coding, pass 1")* __________________________________
- **Pointer to data:** *(page/line, code, or recording timestamp)* __________________________________

Core Content

2) Brief description of context
(What happened? Where in the process am I?)

3) Interpretation
(What does this mean? What patterns or ideas am I seeing?)

4) Competing explanations/rival interpretations
(List plausible alternatives; note what would support or weaken each.)

- Alt A:
- Alt B:
- Evidence needed / uncertainty:

5) Decision taken (if any)
(Coding move, theme revision, probe to add, follow-up to schedule, etc.)
6) Rationale for decision
(Why this choice over alternatives? Link to evidence.)
7) Next analytic step
(Exactly what I will do next; by when; where it will be captured.)
8) Brief reflexive note
(How might my positionality, assumptions, or reactions be shaping this memo?)
Quick Coding of Memo (for retrieval)

- **Related RQ(s):** ☐ RQ1 ☐ RQ2
- **Phase:** ☐ Pre-fieldwork ☐ Data generation ☐ First-cycle coding ☐ Second-cycle coding ☐ Theme review ☐ Write-up
- **Keywords/tags:**

File-naming convention
Memo_[MemoType]_[ID or DataRef]_[YYYYMMDD-HHMM]
Example: Memo_Coding_P07_20260115-1430

Example (one-liner prompt to guide writing)
"What did I just notice, what else could it be, what decision (if any) did I make, why, and what will I do next?"

Appendix K:

Full Analytic Memo Example

Memo Header

- **Date & time:** January 31, 2026, 7:45 p.m.
- **Memo type** *(select one)*: ☐ Conta☐Coding ☐ Integrative ☐ Interpretive ☐Method ☐Reflexive
- **Participant /transcript ID:** M16 – Second-Cycle Coding (inventory and grouped matrix)
- **Triggering event:** Completion and confirmation of (1) Values Code Inventory Table and (2) Second-Cycle Pattern Coding Matrix (Grouped)
- **Pointer to data:** Code Inventory Table (Values Codebook v1.2; P1–P9) and Second-Cycle Pattern Coding Matrix (Grouped)

Core Content

1) Brief description of context

This memo documents the formal transition from first-cycle In Vivo and Values coding to second-cycle pattern coding. At this point in the process, two foundational artifacts have been completed and confirmed:

1. A comprehensive Values Code Inventory Table documenting the presence or absence of all Values codes from Codebook v1.2 across participants P1 – P9.
2. A Second-Cycle Pattern Coding Matrix (Grouped) that organizes the same set of Values codes into higher-order analytic categories to support cross-case comparison.

The purpose of this step is not to generate themes or interpretations, but to establish a d bridge between first-cycle coding and deeper analysis by confirming code coverage and establishing an initial structure for pattern detection.

2) Interpretation

The inventory table and grouped matrix function as complementary controls for second-cycle analysis. The inventory table serves as a completeness and accountability mechanism. It confirms which Values codes are actually present in the dataset and prevents selective attention or premature narrowing of analytic focus.

The grouped matrix serves as an organizing device that helps with systematic cross-case comparison by clustering Values codes into provisional analytic categories. This organization supports early pattern recognition while intentionally stopping short of thematic claims.

Several early structural signals are visible at the matrix level:

- Authority-related conditions (e.g., authority limitation, informal authority, symbolic access) recur across nearly all cases, suggesting that constrained authority is a shared role condition rather than a context-specific anomaly.
- Sustainability and harm-related codes show both convergence (e.g., harm mitigation, ethical stewardship) and uneven distribution (e.g., moral exit / ethical self-preservation), indicating potential differentiation across cases that may later function as boundary conditions.
- The retention of participant-level presence allows for identification of disconfirming or boundary cases in subsequent analytic steps.

These observations remain provisional and descriptive.

3) Competing explanations/rival interpretations
One alternative explanation is that the grouped categories impose structure too early, potentially shaping pattern recognition rather than revealing it. This concern will be evaluated during subsequent second-cycle analysis by examining within-category coherence and cross-category overlap. A second alternative explanation is that high recurrence of certain Values codes reflects interview guide effects rather than shared lived conditions. This possibility will be assessed by examining whether recurring codes emerge in varied narrative contexts across participants rather than clustering around specific prompts.

4) Decision taken (if any)
Three decisions are formalized at this stage:

1. The Values Code Inventory Table is treated as the locked record of Values code presence for this dataset (Codebook v1.2; P1–P9).
2. The Grouped Second-Cycle Matrix is adopted as the formal analytic starting point for second-cycle pattern coding.
3. No Values codes are collapsed, eliminated, or elevated to themes at this stage.

5) Rationale for decision
Locking both the inventory table and grouped matrix at this point strengthens analytic rigor by ensuring that second-cycle work proceeds from a stable, auditable foundation. This sequencing prevents drift in what constitutes the analytic universe of Values codes and makes subsequent patterning decisions transparent and defensible.

6) Next analytic step
The next step is a focused second-cycle analytic memo examining:

- coherence within each provisional category,
- recurring clusters or co-occurrences of Values codes,
- disconfirming or boundary cases, and
- provisional pattern statements that remain descriptive rather than thematic.

This work will be anchored in the grouped matrix and supported by participant-level evidence.

7) Brief reflexive note
Given my professional proximity to senior DEI leadership roles, I am intentionally using structured inventory and matrix tools to discipline interpretation. This approach ensures that analytic claims emerge from documented cross-case patterns rather than experiential familiarity or assumed coherence.

Quick Coding of Memo (for retrieval)

- **Related RQ(s):** ☐ RQ1 ☐ RQ2
- **Phase:** ☐ Pre-fieldwork ☐ Data generation ☐ First-cycle coding ☐ Second-cycle coding ☐ Theme review ☐ Write-up

Keywords/tags: second-cycle coding; values code inventory; grouped matrix; cross-case comparison; analytic discipline; auditability

Appendix L:

Analytic Evolution Table (codes to categories to themes)

This table illustrates the analytic progression from first-cycle Values coding through refined second-cycle categories to final themes presented in Chapter Four.

Representative Values Codes (v1.2)	**Refined Analytic Category**	**Final Theme**
Authority limitation		
Symbolic access		
Symbolic authority		
Informal authority		
Enforcement exclusion		
Nontraditional roles	**Authority Conditions**	**Proximity Without Power as a Defining Role Condition**
Resource sufficiency		
Resource dependence		
Resource improvisation		
Institutional disinvestment		
Fiscal efficiency		
Enrollment logic	**Resource Conditions**	**Resources Enable Action but Do Not Resolve Authority Constraints**
Strategic framing		
Execution credibility		
Audience tailoring		
Work dismissal		
Student-driven legitimacy	**Legitimacy Work**	**Legitimacy Is Continuously Negotiated Through Translation and Performance**
Legal constraint		
Backlash risk		
Resistance management		
Scapegoating risk	**External Environment Pressures**	**External Pressures Shape Risk Tolerance and Strategic Choices**
Role overload		
Role precarity		
Psychological safety deficit		
Devalued labor		
Time-bound impact		

Leadership stagnation	**Role Sustainability & Burden**	**Sustainability Is Threatened by Accumulated Burden and Ethical Tension**
Moral boundary		
Self-protection		
Strategic exit		
Moral Exit / Ethical Self-Preservation	**Ethical Limits and Exit**	**Ethical Disengagement and Exit as Meaning-Making, Not Failure**