

THE GOVERNANCE OF DIFFERENCE IN HIGHER EDUCATION:
RETRENCHMENT, STRATEGY, AND SCHOLARLY PRACTICE

by

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DEDICATION

To my husband, Dr. Ari Lee Laskin. You have stood behind every goal I have chased, not just with encouragement, but with the kind of support that makes difficult things possible. You have pushed me toward excellence while also giving me the freedom to find my own way there. You are the dreamer in this partnership, the one who keeps sight of what could be when I often get preoccupied with what is missing. Thank you for being on this journey with me and for being able to lift all the heavy things.

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ABSTRACT

This three-manuscript dissertation examines how higher education institutions and scholars pursue legitimacy under contested terrain, a condition in which the terms of legitimate action and credible knowledge are unstable and politically contested. Using the governance of difference as its unifying frame, the study asks how difference and otherness are defined, managed, and made credible within higher education.

Using quantitative and qualitative methods, the dissertation examines three empirical sites. The first manuscript analyzes national patterns of diversity, equity, and inclusion retrenchment among R1 universities. The second examines how Montana State University governs diversity, equity, and inclusion through institutional strategy documents. The third analyzes positionality statements in education journals.

Findings show that higher education manages difference across organizational response, institutional planning, and scholarly knowledge production. Universities respond to pressure through retrenchment, restructuring, renaming, and symbolic repositioning. Strategic texts frame diversity, equity, and inclusion through climate, conduct, and measurement rather than deeper structural change, while scholarly disclosures function as negotiated practices for establishing credibility. Overall, the dissertation concludes that higher education often makes difference institutionally manageable in ways that narrow its transformative possibilities.

CHAPTER ONE

INTRODUCTION OF UNIFYING TOPICS

The day the U.S. Department of Education issued its February 14, 2025, *Dear Colleague* letter, my phone lit up. Colleagues and friends were not calling to debate its legal interpretation, but to know whether my job was safe. Before many of us read the document closely, we understood its implication, that diversity, equity, and inclusion (DEI) had become administratively vulnerable not just through state legislation (as it had been for years) but now, through federal action as well. Issued by the Office for Civil Rights, the letter notified federally funded institutions that the office considered the use of race, color, national origin, and related intersecting proxies in admissions, hiring, scholarships, discipline, and other programs unlawful (U.S. Department of Education, 2025).

The letter did not come as a surprise; nevertheless, it was still jarring. By then, the Trump administration had already made its hostility toward DEI in higher education clear through other executive orders and administrative efforts aimed at dismantling related programs and commitments (Ostrager et al., 2025; U.S. Department of Education, 2025). Nor did the letter emerge in a vacuum. It came after several years of growing attacks on DEI in U.S. higher education, as states moved to limit DEI and as political and advocacy groups increasingly cast equity work as ideological overreach rather than as a core institutional responsibility (Kamola, 2024). Thus, the *Dear Colleague* letter did not create a new controversy but effectively federalized an existing one. What had already become politically difficult to defend at many state levels was now rendered more administratively precarious at the federal level (U.S. Department of Education, 2025).

Additionally, the letter brought into sharper focus a longer pattern I have witnessed for over 20 years in higher education, namely, that DEI has never been a fully secure institutional arena. Even when included in mission statements, strategic plans, and dedicated offices and roles, DEI remains unevenly authorized and vulnerable to taming and abandonment (Ahmed, 2012; Berrey, 2015; Iverson, 2008). Its legitimacy has often depended on whether it could be translated into prevailing institutional norms, even when those norms were part of the very structures DEI sought to transform (structural racism, whiteness, settler-colonialism, sexism, etc.) (Brown, 2015; Iverson, 2007, 2008; Shore & Wright, 1999). DEI has repeatedly had to secure institutional legitimacy through justification and strategic translation, even when other administrative priorities such as student success, workforce readiness, retention, and graduation rates are treated as broadly acceptable (Ahmed, 2012; Berrey, 2011; Byrd, 2022; Ray, 2019).

Purpose of Study

This three-manuscript dissertation begins with DEI but also extends beyond this domain. More fundamentally, it examines how higher education actors pursue legitimacy when standards for institutional action, governance, and credible knowledge are unstable, disputed, or politically overdetermined. Across the dissertation, I analyze how higher education actors, and in particular institutions and scholars, respond when engagements with difference, otherness, and marginality must be made legible and defensible to multiple audiences under heightened scrutiny and/or uncertainty. I use the phrase *contested terrain* to name this broader condition in which the criteria for institutional credibility are unsettled and do not lend themselves to stable alignment or resolution. Higher education actors are accountable to multiple external and internal audiences, including legislators, federal agencies, accreditors, donors, disciplinary communities, campus

stakeholders, and broader publics, which often hold different and sometimes incompatible expectations (DiMaggio & Powell, 1983). These overlapping pressures generate ongoing legitimacy work in which institutions and scholars must translate, reframe, and defend their actions in order to remain credible within the broader higher education landscape. This dissertation examines how institutions and scholars maintain credibility when the conditions for legitimacy cannot be fully reconciled.

This dissertation focuses on what I call the *governance of difference*, meaning the institutional and scholarly practices in which difference and otherness are defined and managed within higher education. This includes strategic planning, administrative documentation, professional norms, and scholarly disclosures. The term draws attention to how institutions take up difference as an object of governance, often in ways that narrow, contain, or domesticate more transformative possibilities. Across the dissertation, the governance of difference provides the unifying analytic frame for examining how institutions and scholars render engagements with difference legible and credible under contested terrain.

This dissertation examines these questions across three related empirical sites. The first manuscript analyzes national patterns of DEI retrenchment among R1 universities. The second is a case study of Montana State University, Bozeman (MSU) that examines how institutional strategy documents define, organize, and make DEI administratively actionable. And the third, analyzes positionality statements in education journals to examine how scholarly credibility is negotiated through reflexive disclosure. Taken together, these manuscripts show how higher education governs difference across organizational response, institutional planning, and scholarly knowledge production.

This introduction chapter establishes the conceptual and analytical foundation for the dissertation as a whole. It begins by treating legitimacy as a necessary feature of higher education, then develops contested terrain as the broader condition within which that problem takes shape and introduces the governance of difference as the dissertation's primary analytic focus. The chapter then outlines the theoretical and paradigmatic frameworks guiding the study and closes by addressing the dissertation's methodological orientation and significance. Taken together, these sections establish the unifying themes of the dissertation.

Overview of the Manuscripts

Mapping DEI Retrenchment Across R1 Universities

The first manuscript (Chapter 2), *Mapping DEI Retrenchment Across R1 Universities*, is a co-authored study with Desiree Taylor, a fellow Ph.D. candidate in the Adult and Higher Education program at MSU. The chapter examines national patterns of DEI retrenchment since 2023, as federal and state actors intensified coordinated efforts to dismantle DEI infrastructure in higher education. Using an exploratory quantitative design, the study draws on a national sample of 176 R1 institutions constructed from *The Chronicle of Higher Education's* DEI tracker and codes retrenchment actions into four categories: structural, symbolic, funding, and ambiguous. The analysis employs descriptive statistics, chi-square tests of independence, and Kruskal-Wallis H tests to examine the political and institutional conditions associated with these responses. The manuscript shows that symbolic and structural retrenchment dominate the landscape, with structural retrenchment most strongly associated with Republican gubernatorial leadership, enacted anti-DEI legislation, and larger institutional size. Rather than treating rollback as a series of isolated decisions, the study interprets retrenchment as a patterned response to racialized

political pressure. Here, legitimacy work appears through renaming, restructuring, defunding, symbolic repositioning, and other forms of institutional recalibration that allow universities to present themselves as compliant, prudent, and politically credible.

Governing DEI Through Strategy Texts: A Case Study of Montana State University

The second manuscript (Chapter 3) is a qualitative case study of MSU that examines how DEI is constructed and governed through institutional strategy texts. Using critical discourse analysis and reading the documents as an intertextual policy assemblage, the study analyzes MSU's 2012 strategic plan, its 2017 *Diversity and Inclusion Framework Report*, and its 2019 strategic plan, including the 2023 amendments. The manuscript shows that, across these texts, DEI is authorized through land-grant continuity, defined through climate, conduct, and workforce readiness, and made actionable through metrics and annual monitoring. Institutional action centers less on redistribution or structural change than on making DEI legible in forms the institution can track, evaluate, and report. More material commitments, particularly those involving resource allocation and institutional reorganization, are frequently shifted out of the university's strategic plans and into the lower-authority, less enforceable *Diversity and Inclusion Framework Report* (2017). The findings show that MSU's strategy texts organize DEI unevenly and narrow how it is enacted in practice. DEI is visible across the documents, but mostly in constrained forms tied to campus climate, civility, and measurement rather than deeper institutional change.

The Strategy of Disclosure: Positionality Statements in the Field of Education

The third manuscript (Chapter 4), *The Strategy of Disclosure: Positionality Statements in the Field of Education*, examines disclosure language and positionality statements in three leading peer-reviewed higher education journals: *The Journal of Higher Education* (JHE), *Journal of Diversity in Higher Education* (JDHE), and *The Review of Higher Education* (RHE). Using qualitative content analysis with a summative orientation, the study analyzes how disclosure passages are placed, labeled, and used across the period from 2015 to 2024. The manuscript shows that positionality statements appear unevenly across publications and over time, vary in form and placement, and are often framed through the language of positionality, reflexivity, and trustworthiness. Additionally, the study finds that disclosure is not a stable genre but a negotiated writing practice. Through it, scholars locate themselves in relation to their research, address potential bias, signal reflexivity, and respond to uneven professional expectations around rigor and transparency. In this manuscript, credibility is secured not through policy or planning language, but through scholarly practices of self-disclosure.

Unifying Themes

The Problem of Legitimacy in Higher Education

Institutional scholars argue that organizations do not survive on performance alone. They must also align themselves with the norms and expectations of the broader structures in which they operate (DiMaggio & Powell, 1983; Manning, 2017). In the context of higher education, some institutional priorities carry relatively settled legitimacy. Goals such as student success, retention, graduation, compliance, and institutional effectiveness are widely recognized as

appropriate objects of administrative attention, even when there is disagreement regarding how they should be pursued. Because these aims are broadly accepted, they can usually be advanced through familiar institutional languages and actions, such as mission statements, excellence initiatives, performance reviews, and accountability metrics (DiMaggio & Powell, 1983; Manning, 2017).

Other priorities do not occupy the same position. Some issues are more openly contested because they carry competing political, legal, and ideological meanings and are judged differently across audiences. DEI is one such example. What some view as a necessary response to inequality, others frame as political overreach, ideological excess, legal liability, or institutional risk (Ahmed, 2012; Iverson, 2007, 2008). DEI also carries with it the legacy of earlier struggles over affirmative action, multiculturalism, access, and desegregation, all of which expanded opportunity while simultaneously reshaping, and at times narrowing, the terms under which justice claims could be advanced in the university (Baker, 2019; Berrey, 2011, 2015; Felix & Trinidad, 2020; Ferguson, 2012; Iverson, 2008). The current backlash therefore does not mark a sudden break from an otherwise settled order. Rather, it exposes the instability that has long shaped how colleges and universities engage racial justice and social difference (Ahmed, 2012; Berrey, 2015; Iverson, 2007, 2008).

This dissertation takes DEI as a highly visible site where legitimacy is contested rather than assumed. DEI becomes a flashpoint because it forces institutions to confront whether and how commitments to inclusion, redress, and belonging can be sustained when they are politically costly or symbolically fraught (Ahmed, 2012; Byrd, 2022; Kamola, 2024). It is within this instability that contested terrain emerges: a condition in which the criteria for institutional

credibility are unsettled and resist stable resolution. The dissertation asks how institutions and scholars act under such conditions.

The Governance of Difference

While *contested terrain* names the broader condition in which these struggles unfold, while the *governance of difference* names this dissertation's central analytic focus. I use the term to describe the institutional and scholarly processes through which alterity is made intelligible, legitimate, and actionable within higher education. In this framework, difference is a relational product of unequal power. It names identities, populations, knowledges, and ways of being marked as outside dominant institutional norms (Foucault, 1980; Hall, 1997). This understanding draws on critical, postcolonial, and feminist scholarship that treats otherness as a political and epistemic condition produced through subordination and exclusion (Ahmed, 2012; Ferguson, 2012; Spivak, 1988).

Framing difference in this way requires recognizing that higher education has long been implicated in the production and regulation of alterity. Colleges and universities have participated in colonial, racialized, and disciplinary projects that classify populations, authorize some forms of knowledge over others, and establish the norms through which legitimacy is conferred (Foucault, 1977; Slaughter and Rhoades, 2004). This history is especially important in the U.S. land-grant context. As scholars have argued, the land-grant system was built through the seizure of Indigenous land, with Native lands converted into hegemonic institutional wealth (González Stokas, 2023; Lee et al., 2020). The Morrill Act expanded access for some while deepening the elimination and marginalization of others (González Stokas, 2023; Nash, 2019). In

that sense, the land-grant university did not simply inherit a colonial past but was made possible through it.

Postcolonial and decolonial scholarship pushes this point further by showing that what appears outside institutional reason is not merely excluded, but actively produced through dominant epistemic frameworks (Chatterjee and Maira, 2014; Spivak, 1988). These frameworks determine who can speak, who can be heard, and what counts as legitimate knowledge. The governance of difference refers to the ways potentially disruptive forms of otherness are converted into administratively and professionally recognizable terms (Ahmed, 2012; Berrey, 2011; Iverson, 2007). This is process of translation, or co-optation. Institutional theory is useful here because organizations operate within fields that reward credibility. When legitimacy is uncertain, institutions often adopt familiar structures, languages, and practices (DiMaggio & Powell, 1983; Meyer & Rowan, 1977). In higher education, this means that engagements with difference are often filtered through forms already established as credible. Demands rooted in racial justice or decolonization, for instance, are translated into more institutionally legible vocabularies such as belonging, climate, excellence, access, civility, or student success (Ahmed, 2012; Berrey, 2011; Iverson, 2007).

This governance of difference also helps explain why visibility should not be confused with transformation. Scholars have shown that institutions can name inequity, celebrate inclusion, and publicly affirm minoritized identities while leaving underlying relations of power largely intact (Ahmed, 2012; Iverson, 2012). Recognition may increase visibility, but visibility can also function as containment. This dissertation argues that higher education often engages

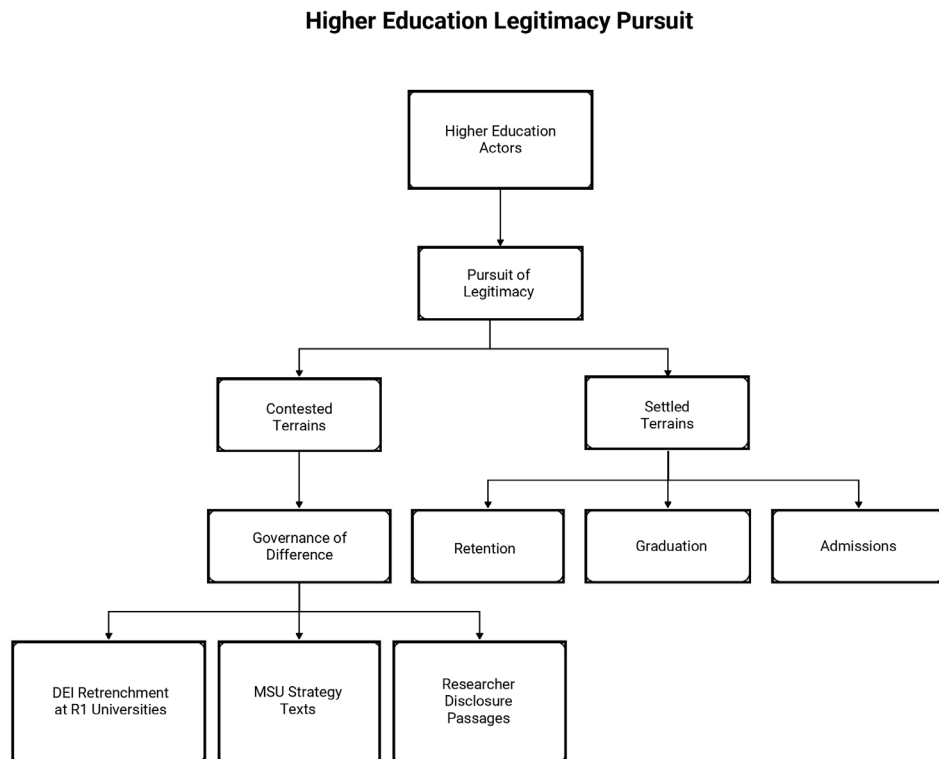
difference not by reorganizing itself around alterity, but by converting alterity into administratively manageable forms. Difference becomes durable when it is made governable.

This logic is especially visible in the Montana State University case study in Chapter 3. There, DEI moves across multiple institutional strategy texts and is progressively distilled into an administrative field the university can monitor and manage. Difference is made actionable through climate discourse, civility, metrics, and annual monitoring rather than through stronger commitments to redistribution or institutional restructuring. The point is not simply that MSU utilizes a specific planning language, but that it sustains DEI by recasting it into pre-existing systems in which it can be safely absorbed (Ahmed, 2012; Iverson, 2007, 2008; Power, 1997).

A similar logic of governance appears in scholarly knowledge production, where researchers navigate the translation of their own positionality into professionally recognizable forms. As explored in Chapter 4, positionality statements emerged from feminist and postcolonial critiques of false objectivity, insisting that knowledge is inextricably shaped by standpoint, power, and relation (Holmes, 2020; Milner, 2007; Secules et al., 2021; Sybing, 2022). However, as these interventions are subsumed into the governance of difference, their function often shifts from a critique of objectivity toward a formalized mode of professional accountability. Once positionality enters disciplinary practice as an established genre, it becomes simultaneously disciplined by those very practices, reshaped by genre conventions, publication norms, and professional expectations (Hampton et al., 2021; Secules et al., 2021). In this context, positionality statements can function as a technology of the self, translating researcher subjectivity into a recognizable form that satisfies institutional and disciplinary demands (Hampton et al., 2021; Holmes, 2020; Secules et al., 2021).

Across these cases, the governance of difference represents the primary mechanism through which institutions and scholars navigate this particular contested terrain. Whether through isomorphic moves like renaming and restructuring or through the strategic use of disclosure language to establish rigor, these actions define what counts as a legitimate response to difference (Ahmed, 2012; DiMaggio & Powell, 1983; Iverson, 2008; Power, 1997). Taken together, these cases show that higher education governs difference through institutional and scholarly practices (Ahmed, 2012; Iverson, 2007, 2008; Ray, 2019; Shore & Wright, 1999). Figure 1 illustrates this unifying argument by showing how, across all three empirical sites, the governance of difference operates as a means of pursuing legitimacy within contested terrain.

Figure 1. Higher Education Legitimacy Pursuit.



Theoretical and Paradigmatic Framework

Institutional Theory

Institutional theory helps explain why higher education organizations often respond to contested terrains through familiar and recognizable forms. Rather than treating institutional action as purely rational or internally driven, it emphasizes that organizations operate within broader fields of expectation in which legitimacy matters for survival and credibility (DiMaggio & Powell, 1983; Manning, 2017). DiMaggio and Powell (1983) describe this process as isomorphism, or the tendency for organizations within the same field to adopt similar structures and practices to align themselves with prevailing norms and expectations. These pressures may be coercive, such as legislation or regulation; mimetic, such as imitation under uncertainty; or normative, such as professional standards and expectations. This framework is useful for this dissertation because it helps explain why responses to difference often take patterned rather than idiosyncratic forms. In Chapter 2, institutional theory clarifies why DEI retrenchment appears across universities through recognizable actions. Overall, it helps explain why institutions and scholars turn to established organizational and professional forms when legitimacy is unsettled. Institutional theory thus provides a foundation for analyzing how credibility is pursued in higher education.

Racialized Organizational Theory

While institutional theory helps explain why organizational responses become patterned, it does not fully account for the racialized character of higher education itself. To address this, this dissertation turns to Racialized Organizational Theory (ROT), which rejects the assumption

that universities are race-neutral structures and instead argues that racial meanings and hierarchies are embedded in organizational processes, policies, and decision-making (Ray, 2019). From this perspective, organizations do not simply manage difference from the outside; they are already racialized and thus shape whose presence, knowledge, and claims appear legitimate. ROT is important to this dissertation because it clarifies that the governance of difference unfolds within institutions that are always already uneven and exclusionary. This insight matters across all three manuscripts. In Chapter 2, it helps explain why retrenchment cannot be understood as neutral. In Chapter 3, it clarifies why DEI is often folded into institutional languages that preserve rather than unsettle dominant norms. In Chapter 4, it helps frame scholarly credibility as shaped by professional fields that are themselves structured by unequal relations of power. ROT grounds the dissertation's argument that struggles over legitimacy are inseparable from struggles over how difference is managed within higher education.

Neoliberalism

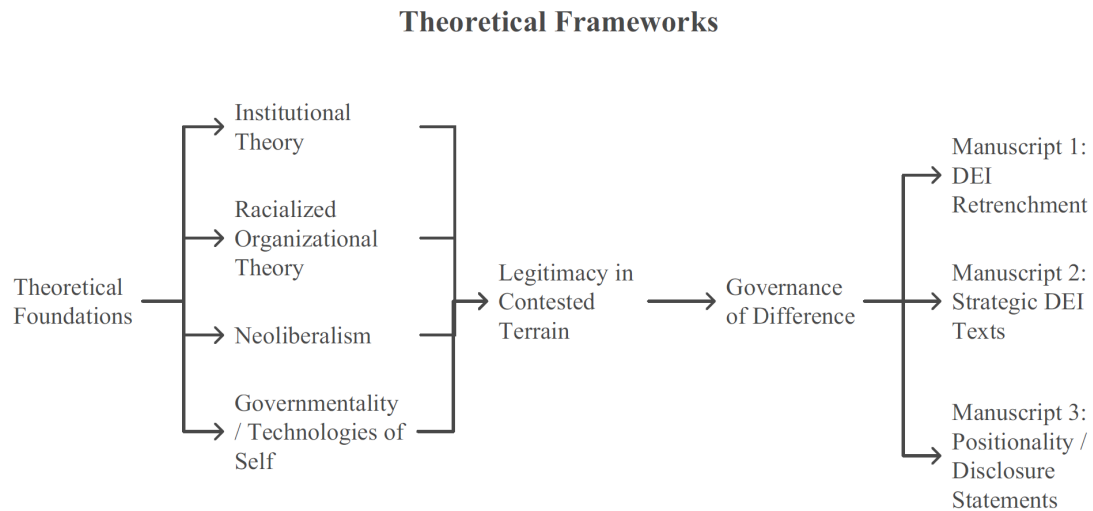
Neoliberalism is an important context for this dissertation because it operates as a governing paradigm embedded in how institutions are organized and judged. Under neoliberalism, managerial practices such as efficiency, accountability, audit, and measurable performance become central markers of institutional credibility (Brown, 2015; Shore & Wright, 1999; Strathern, 2000). Within this framework, equity commitments are often not rejected outright by (re)shaped into forms that are more legible to institutional systems of assessment and performance management (Ahmed, 2012; Berrey, 2015; Iverson, 2007, 2008). This dynamic is especially visible in the second manuscript, where DEI is maintained through strategic planning and documentation. Neoliberalism clarifies a central feature of contested terrain: institutional

engagements with difference are most likely to persist when they can be translated into forms that institutions can manage, measure, and contain (Ahmed, 2012; Shore & Wright, 1999; Strathern, 2000).

Governmentality & Technologies of the Self

A Foucauldian framework is also central to this dissertation because it helps explain how legitimacy is organized through discourse, administrative practice, and self-disclosure across the contested terrains examined here. From this perspective, discourse does not simply describe institutional problems but also produces them (Foucault, 1977, 1980). Through the lens of governmentality, power operates through the organization of knowledge, measurement, and administrative practice (Foucault, 2007). These insights are especially important for Chapters 3 and 4. In the MSU case study, this framework shows how DEI becomes governable through administratively legible ways. In Chapter 4, it extends to scholarly writing, where positionality statements can be read as technologies of the self, practices in which researchers discipline themselves as credible subjects within the regimes of knowledge production (Foucault, 1977; Rose, 1999). Governmentality helps show how legitimacy is pursued through institutional structures and through the formation of subjects who learn to speak in institutionally credible ways. As Figure 2 illustrates, the theoretical foundations of this project converge on the problem of legitimacy under contested terrain and provide the basis for analyzing how the governance of difference operates across the dissertation's three empirical sites.

Figure 2. Theoretical Framework.



Significance of Study

This dissertation offers theoretical and practical contributions to the field of higher education. By examining the governance of difference across three distinct arenas of higher education. Theoretically, this dissertation bridges institutional theory with racialized organizational theory and Foucauldian concepts of governmentality. It introduces and develops the *governance of difference* as a framework for understanding how institutions do not merely support or oppose otherness but make it governable through administrative and discursive technologies. This framework provides a new vocabulary for scholars to analyze how neoliberal audit cultures and racialized hierarchies shape what can be said and done in the name of difference.

This research also offers insights for higher education administrators, policymakers, and scholars. For university leaders, the findings illuminate the constrained forms of DEI that are

often prioritized in strategic planning and the potential costs of shifting more structural commitments into less enforceable arenas. For scholars, the analysis of positionality statements provides a clearer understanding of emerging professional norms of disclosure, offering insight into the uneven expectations in academic publishing. Ultimately, by making the mechanics of the governance of difference visible, this dissertation invites further dialogue on sustaining equity commitments within the contested terrains of the university.

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CHAPTER TWO

MAPPING DEI RETRENCMENT ACROSS R1 UNIVERSITIES:
INSTITUTIONAL CHARACTERISTICS AND PATTERNS OF
CHANGE

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CHAPTER TWO

MAPPING DEI RETRENCHMENT ACROSS R1 UNIVERSITIES:
INSTITUTIONAL CHARACTERISTICS AND PATTERNS OF
CHANGEIntroduction

R1 universities now sit at the center of the national struggle over Diversity, Equity, and Inclusion (DEI) as the White House undertakes unprecedented efforts to dismantle related programs, policies, and commitments through a series of executive orders (Ostrager et al., 2025). This paper explores how R1 universities in the United States are responding to federal and state diversity, equity, and inclusion retrenchment initiatives that have intensified since 2023. Our research maps the range of institutional responses and examines how those responses vary according to institutional characteristics. We define DEI retrenchment initiatives as coordinated state and federal efforts aimed at eroding and/or dismantling DEI infrastructure in higher education (Kamola, 2024; Holleran et al., 2023). This includes policies, administrative positions, funding streams, and programmatic commitments.

Higher education (HE) has undergone rapid change since the racial justice uprisings of 2020, a period marked by mass student mobilization against systemic racism alongside a growing partisan divide over whether and how universities should respond. Universities responded to the uprisings with actions ranging from symbolic gestures to structural reforms, including issuing diversity statements, pledging to improve campus climate, establishing dedicated DEI roles and departments, revising curricula, and investing in equity-focused research

(Watson, 2024). As institutions scaled up their DEI efforts, conservative backlash simultaneously grew louder. Holleran et al. (2023) argue that 2021 marked a significant shift in these efforts, as conservative think tanks began to coordinate a more strategic and expansive legislative campaign to undermine DEI, replacing the ad hoc opposition of previous years. Thus, for the past five years universities have been targeted and critiqued for their support of DEI but we know far less about how they are systematically responding.

Problem Statement

A coordinated campaign of DEI retrenchment has unfolded across federal and state levels (U.S. Department of Education, 2025). This rollback is driven by executive orders and policy directives that restrict federal funding and pressure universities to comply, justified by claims that DEI is “radical,” “wasteful,” and contrary to neutrality and merit (The White House, 2025). Despite a growing body of public commentary, our systematic literature review shows little empirical research on how R1 universities have responded to the mounting backlash against DEI.

Given this rapidly developing issue, existing discourse is either speculative, media-driven, or focused on isolated case studies. Missing from the scholarship is a standardized and comprehensive examination of institutional responses and how these responses vary by institutional characteristics. R1s are central to this study because of their size, reliance on federal and state funding, prestige, and outsized influence on the broader HE landscape. As the most visible and well-resourced institutions, they are influential and vulnerable, setting the tone for practices and policies that shape the sector as a whole. Thus, understanding how they respond to DEI retrenchment allows us to better understand the state of racial equity in HE and the pressures reshaping it.

Purpose of Study

This study systematically documents and categorizes R1 institutional responses to DEI retrenchment and identifies institutional characteristics associated with those responses. We situate these actions within the broader institutional adaptations to external pressures. Our analysis is guided by the conceptual frameworks of Institutional Theory (IT), Racialized Organizational Theory (ROT), and Institutional Racial Paralysis (IRP). As shown in Figure 2, these frameworks highlight that institutions are not neutral but racialized structures, and that DEI efforts are inseparable from race, even as these efforts work to expand representation for historically marginalized groups across multiple axes of domination (Ray, 2019). For this project, race and racial equity are our primary analytic focus.

Research Questions

This paper is guided by two central research questions:

1. Since 2023, what types of DEI retrenchment actions have R1 universities taken in response to state and federal pressures?
2. How do these actions vary across internal institutional characteristics and external influence?

Significance of Study

This study illuminates how R1 universities respond to the racialized political pressures shaping contemporary DEI retrenchment. By linking institutional responses to racialized organizational logics and risk-averse decision-making, our findings show that DEI commitments were structurally fragile, rooted more in compliance, legitimacy, and resource acquisition than in transformative equity work. Retrenchment thus exposes enduring patterns of racialized

institutional behavior rather than anomalous deviations. This analysis offers an empirical basis for understanding how universities respond to racialized crises and supports future research on institutional reactions to racialized pressures.

Literature Review

A systematic literature review of scholarship and grey literature on diversity, equity, and inclusion (DEI) in higher education was conducted between February 2025 and June 2025. We searched Google Scholar, Google Gemini, and ProQuest using keywords such as *diversity*, *equity*, *inclusion*, *retrenchment*, *affirmative action*, *backlash*, and *higher education*. The search yielded approximately 100 abstracts published over the past ten years. After screening, we excluded works that focused on K–12 contexts, international higher education, or general organizational diversity management outside of HE. Both peer-reviewed publications and grey literature (e.g., policy briefs, advocacy reports, AAUP publications) were included when they provided empirical evidence or theoretical framing relevant to institutional DEI responses. In total, 42 articles and reports met the inclusion criteria and were retained for review. The literature review is organized into two parts: the institutionalization of DEI and its inherent vulnerabilities.

Institutionalizing DEI

The modern framework for diversity in HE emerged from the Civil Rights Movement’s goal to “correct historical discrimination” (Baker, 2019, p. 1861) through affirmative action policies. This reparations approach was the dominant paradigm for over a decade in HE until the Supreme Court’s 1978 decision in *Regents of the University of California v. Bakke*. The Supreme Court’s decision was a major turning point that shifted the reparations model toward the diversity

model we see today; additionally, it marks a significant retrenchment action. The Court ruled that rigid racial quotas for admissions were unconstitutional while simultaneously recognizing that a diverse student body was in the best interest of the institution, the student body, and ultimately, society. Therefore, race-conscious admissions policies could be justified in the eyes of the Court (Baker, 2019; Rajasekar et al., 2025). Many scholars argue that this ruling not only marks the origins of the diversity paradigm that we see today but also demonstrates that this paradigm, from its origins, obscures structural racism and the politics of equity in service of institutional interest (Ahmed, 2012; Felix & Trinidad, 2020; Iverson, 2012).

Race-conscious admissions policies provoked immediate conservative backlash. Yet these policies did not encounter substantive legal restrictions until the 1996 passing of California's Proposition 209 (Baker, 2019; Felix & Trinidad, 2020). In the 1980s, the conservative resistance began to take shape, and the discourse around "reverse discrimination" gained traction in popular culture (Omi & Winant, 2015). This period also marked a broader political shift toward conservatism and saw a wave of unsuccessful lawsuits challenging university admissions policies. These developments ultimately laid the groundwork for the first state level ban on the use of race as a factor for university admissions with the passing of California's Proposition 209 (1996). Between 1996 and 2012, other states followed California (Washington, Florida, Michigan, Nebraska, Arizona, New Hampshire, Oklahoma), implementing their own state level bans, setting early stages for the types of DEI retrenchment that we see today (Baker, 2019). These political and legal setbacks did not end diversity initiatives in HE, but they weakened the dominance of affirmative action logics. Universities moved away from rights-based rationales rooted in corrective justice and embraced utilitarian claims that framed diversity as essential for

student learning, workforce readiness, and institutional prestige (Berrey, 2011; Lipson, 2008). This shift positioned DEI as a universal good that shielded universities from legal and political challenges while promoting cultural pluralism at the expense of structural redress.

The diversity paradigm in HE began to normalize more broadly in the early 2000s. By the 2010s, the concept had evolved into what is now widely recognized as Diversity, Equity, and Inclusion (DEI), a tangible and institutionalized set of norms with a measurable presence across HE, both in language and practice. Rajasekar et al.'s (2025) study reveals that a comprehensive analysis of diversity professionals' job titles from 2004 to 2022 shows a marked shift from the generalized term "diversity" to the more codified DEI framework (Rajasekar et al., 2025). The authors documented that "the proportion of schools using the conjoined language of diversity, equity, and inclusion in job titles was minimal in earlier years but increased in the mid-2010s, steadily climbing from about 1.61% of IHEs in 2015 to 14.21% in 2022" (Rajasekar et al., p. 12). Rajasekar et al., argue that this linguistic shift is meaningful because it demonstrates how institutions began engaging in institutional isomorphism around an increasingly legitimized and widely accepted project. DEI became institutionalized, named, and formalized providing a more assertive and specific framework for equity work.

This growing formalization of DEI was not limited to titles or roles; it also became operationalized within university policies and systems. In an audit of nearly 1,000 academic job postings in 2020, Paul and Maranto (2023) found that mandatory diversity statements from faculty candidates had become a common practice, a trend led by the nation's "most influential" universities. Paul and Maranto (2023) state, "selective universities are significantly more likely to require DEI statements than non-selective universities" (p. 314), signaling that DEI

commitments were becoming a marker of institutional prestige as well as a mechanism for shaping faculty lines.

As DEI became embedded within HE, it also emerged as a dominant model for advancing equity across both public and private sectors (e.g., Ahmed, 2012; Rajasekar et al., 2025). Its language and logics were embraced across corporate, nonprofit, and governmental areas, where they became central to diversity compliance, branding, and workforce strategy. DEI's prominence as a high-profile sociopolitical movement was also crystallized by the racial uprisings of 2020, in which the public placed intense pressure on universities, and institutions at large, to respond visibly and materially to demands for racial justice (Kamola, 2024; Watson, 2024). Institutions responded rapidly and in varied ways, ranging from symbolic gestures to structural reforms. Visible institutional responses included issuing diversity statements, pledging to improve campus climate, establishing DEI offices and leadership roles, revising curricula, and funding equity-focused research (Watson, 2024). Additionally, some institutions promised to reassess curricula to include the histories of racism and slavery, prioritize inclusive hiring practices, expand implicit bias training, and, in some cases, launch antiracist or social justice centers and academic programs (Kamola, 2024).

DEI's Inherent Vulnerabilities

As DEI became a more visible and institutionalized fixture of Higher Education, many scholars were simultaneously identifying the model's theoretical and structural vulnerabilities. Scholars argued that DEI efforts were often reduced to performative gestures, absorbed into market logics, constrained in their ability to redistribute power or resources, and ultimately unable to confront the racial hierarchies embedded in university structures (Ahmed, 2012;

Iverson, 2007; Ray, 2019; Scauso, 2024). Ahmed (2012) argues that universities engage in “non-performance acts” that use the language of DEI to mark themselves as progressive and committed to equity while resisting substantive structural change. She explains that diversity work is more often the responsibility of minoritized individuals who are siloed within the institution. These individuals are then cast as disruptive when pushing for change deemed too radical or just simply outside the narrow confines of their institutional roles, reinforcing the brick walls of racialized power (Ahmed, 2012).

Iverson (2007) and Scauso (2024) use similar logics as Ahmed, arguing that the transformative imperatives available within some frameworks of DEI were jettisoned in favor of more constrained, depoliticized approaches. These authors argue that the redistribution of power and resources necessary for a just restructuring of HE is routinely sidestepped, resulting in the co-optation of DEI as a market commodity rather than a mechanism for systemic transformation. Iverson (2007) argues that in the early 2000s, higher education institutions leveraged DEI to enhance their reputation within the marketplace discourse. Their perceived progressiveness and commitment to diversity and equity not only increased their reputation, improved institutional rankings, and attracted particular types of funding, thus offering a competitive advantage without addressing underlying structural power imbalances (Iverson, 2007). Scauso (2024), by contrast, argues that as a commodity within higher education, DEI allows institutions to welcome difference so long as it can conform to the hegemonic structures of the academy. Difference is tolerated only when maintaining institutional logics. Those who bring alternative epistemologies, cultural practices, or systemic critiques are often contained, disciplined, or excluded, underscoring DEI’s function as a commodity rather than a catalyst for transformation (Scauso,

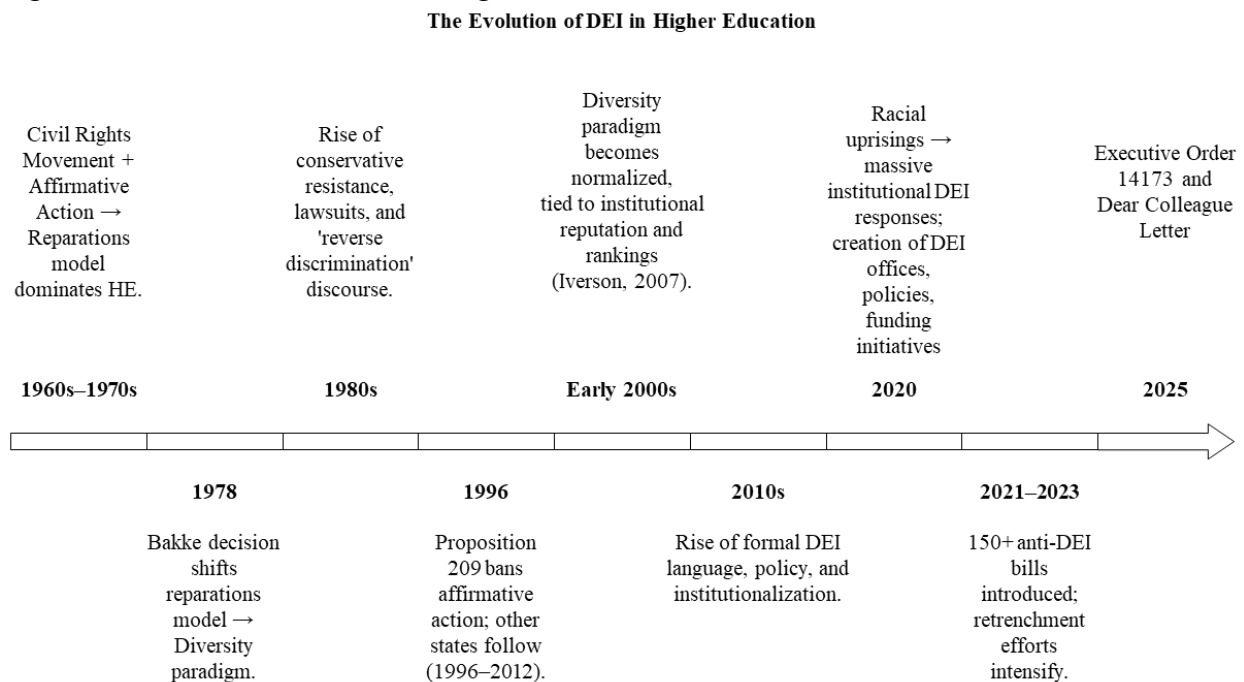
2024). In the end, Iverson highlights how DEI bolsters institutional prestige, while Scauso highlights how that same commodification polices the boundaries of acceptable knowledge and identity. Together these two authors reveal the limits of DEI's transformative potential.

As DEI's value became increasingly tied to institutional branding throughout the 2000s (Iverson, 2007, 2012; Scauso, 2024), and with its frequent, if not pervasive, non-performativity (Ahmed, 2012) it became especially vulnerable to political weaponization, as evidenced in the post-2020 era. DEI's radical promises were severed from its commodified form, making it more palatable. As a result, institutions could readily abandon DEI when it became politically inconvenient (Scauso, 2024). Kamola (2024) demonstrates how the 2020 racial uprisings created an opening for more transformative, justice-oriented DEI efforts to gain traction in HE. In that moment, public demands for racial equity pushed institutions to temporarily loosen their grip on co-opted DEI frameworks and make space, however limited, for initiatives that gestured toward structural change. At that same time, with heightened visibility, DEI became increasingly politically charged and the primary target for a concerted conservative backlash. Kamola (2024) details how right-wing think tanks like the Heritage Foundation, Manhattan Institute, and American Legislative Exchange Council, along with figures like Christopher Rufo and Ron Desantis, reframed DEI as radical and divisive, collapsing it into a broader culture war narrative and transforming its marketability into a liability.

The orchestrated effort resulted in a legislative backlash between 2021–2023 with over 150 bills introduced across the U.S to defund DEI programs, restrict curricula, and weaken academic governance (Kamola, 2024). These attacks draw on a familiar set of arguments that see DEI as too administratively costly, burdensome, illegal, and/or inefficient, as well as a leftist

ideological project that threatens neutrality, meritocracy, and free speech (“wokeness”) (Kamola, 2024; Stokas, 2023; Paul and Maranto, 2023). Kamola (2024) argues that current retrenchment efforts reveal that DEI’s institutional value was never grounded in its capacity for social justice, making it expendable during times of political backlash or uncertainty.

Figure 1. The Evolution of DEI in Higher Education Timeline

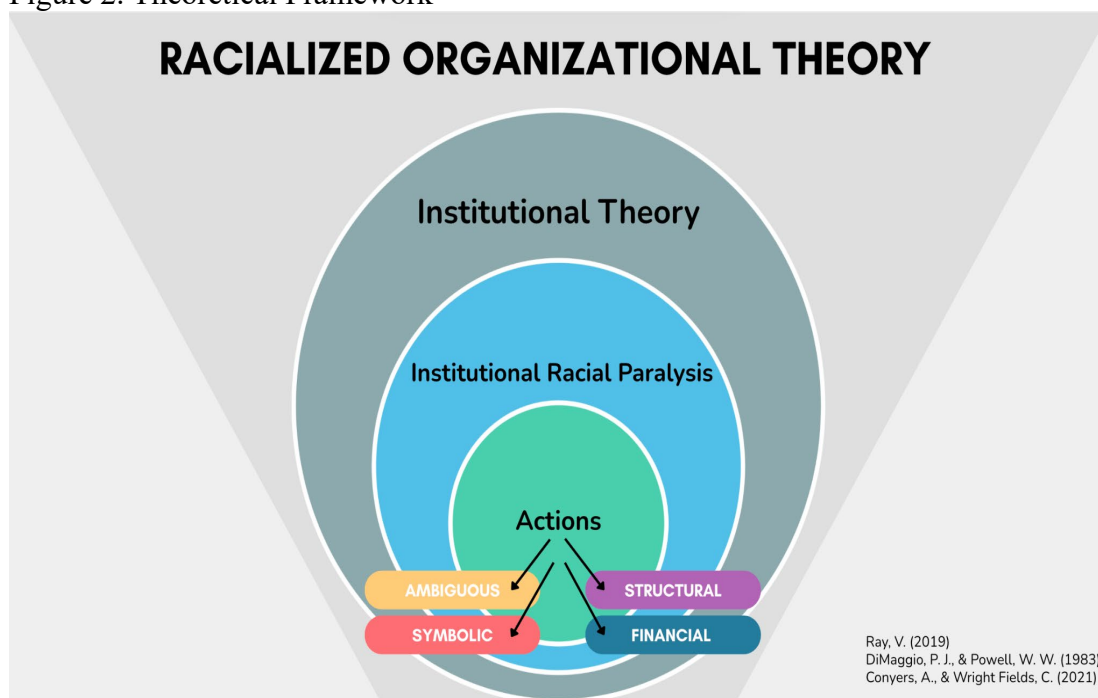


Theoretical Framework

This study identifies and categorizes the types of DEI retrenchment enacted by R1 universities in the post-2023 political climate and explores which institutional characteristics are associated with different types of response. Drawing on The Chronicle of Higher Education’s DEI Legislation Tracker, we coded nine discrete types of retrenchment and grouped them into four broader categories: symbolic, structural, financial, and ambiguous. These serve as the variables of our analysis. We employ a multi-layered theoretical framework as our conceptual

lens that integrates macro-level political analysis, meso-level institutional theory, and micro-level critiques of institutional behavior. This framework posits that DEI retrenchment is the product of the intersection of external political backlash and the model's own pre-existing vulnerabilities, leading universities (as racialized institutions) to respond with a mix of institutional paralysis and strategic adaptation.

Figure 2. Theoretical Framework



Institutional Theory

Institutional theory (IT) argues institutions are constantly working to maintain legitimacy as they are regularly navigating various external political, social, and regulatory pressures (Manning, 2017). Universities, as institutions, are not stand-alone actors but exist within a structure with established norms and expectations that they abide by in an effort to maintain legitimacy (accreditation, public perception, funding). IT provides a framework for

understanding how universities preserve credibility in the face of external conditions. DiMaggio and Powell (1983) identified three types of actions that institutions enact in order to sustain legitimacy: normative isomorphism (adopting standards through professional norms and credentialing), mimetic isomorphism (imitating like institutions in times of uncertainty), and coercive isomorphism (complying with external mandates).

Mimetic, normative, and coercive isomorphism help explain how DEI became institutionalized across higher education, as well as how it is now being strategically dismantled. The institutionalization of DEI in the early 2000s can be explained by mimetic isomorphism as universities began adopting the DEI roles, policies, and branding strategies of elite institutions to remain competitive and appear legitimate in an evolving cultural climate increasingly supportive of diversity (Paul and Maranto, 2023). Normative isomorphism played a central role in the professionalization of DEI work and the establishment of shared standards and credentials across HE (Rajasekar et al., 2025). In the current political moment, coercive isomorphism helps explain the significant DEI retrenchment across R1 institutions as they respond to executive orders, legislative mandates, and conservative public pressures (Kamola, 2024). However, institutions may also be engaging in mimetic isomorphism even in the absence of legislative mandates. For instance, Baker (2019) notes in his analysis of affirmative action that many institutions ended race-conscious admissions policies even in the absence of state bans, mirroring the actions of peer institutions in neighboring states.

Racialized Organizational Theory

IT explains why institutions conform to environmental pressures, but it also assumes that institutions are inherently neutral entities. Victor Ray (2019) debunks this assumption by drawing

on the tenets of Critical Race Theory (CRT), arguing that institutions are intrinsically racialized structures that work to maintain their own logics, norms, and values that work to (re)produce racial inequality. Through the lens of ROT, DEI can never function as a truly transformative model because the university's very own ontological structure is rooted in, and incapable of, dismantling its own racialized structures. Ray (2019) calls this paradox racialized decoupling, a process which institutions signal a commitment to DEI, whether through strategic planning, policy, programs, curriculum, admissions, etc., without dismantling its own core logics, such as reallocate resources in order to enact an anti-racist framework. Similar to Ahmed's (2012) concept of non-performativity, Ray (2019) describes racialized decoupling as the incommensurability between symbolic commitments to DEI and the material transformations necessary to dismantle racialized institutional structures. As a result, DEI is relegated as a branding strategy for institutional legitimacy (Iverson, 2007, 2012; Scauso, 2024), always already constrained by the university's racialized architecture, structurally incapable of enacting deep transformation, and easily discarded when it becomes politically inconvenient.

This political inconvenience is evident in the shifting role of funding. During periods of perceived racial progress, resources flowed to DEI initiatives because they aligned with institutional self-interest, offering reputational capital and compliance with public expectations. This reflects the logic of *interest convergence* (Bell, 1980), in which racial equity is supported only when it benefits dominant power structures. However, as the political economy shifted, DEI became a contested paradigm and funding mechanisms were weaponized by the federal government and a growing number of state legislatures as tools of discipline. Executive Order

14173 (2025) threatened to strip federal funding from institutions engaging in DEI, transforming it from a marketable commodity into a political liability (Kamola, 2024).

Universities do not simply abandon DEI in response to abstract political pressure; they recalibrate in order to preserve funding. On the one hand, elite institutions like Harvard, with their immense financial privilege, large endowments, prestige, and legal infrastructure, can resist such threats and perhaps even enhance their reputations by doing so (Piper-Vallillo, 2025). On the other hand, most universities find such resistance materially unfeasible. For many of these R1 universities, federal research funding is a foundational pillar of their budget, often constituting hundreds of millions or even over a billion dollars annually, making its withdrawal a direct threat to the institution's financial stability. For them, the political pressure puts the inherent vulnerabilities of DEI on display, revealing it to be predictably expendable precisely because an anti-racist restructuring of institutional power was never to be, or could never, be realized.

Institutional Racial Paralysis

ROT argues that institutions are inherently racialized structures that (re)produce inequality through their everyday operations. To analyze how those patterns of behavior unfold in practice, we also draw on Conyers and Wright Fields' (2021) theory of Institutional Racial Paralysis (IRP) as a micro-level theory also rooted in Critical Race Theory (CRT). IRP argues that institutions behave in predictable, risk-averse ways that avoid direct confrontation with race. They write, IRP is "the propensity for an organization to not act when race is a salient factor in a situation" (2021, p. 487). Conyers and Wright Fields' (2021) describe four types of IRP behaviors: Idleness (doing nothing), Concealment (offering vague or symbolic statements),

Evolving Modus Operandi (renaming, reorganizing, or reframing DEI), and Pervasiveness (normalizing anti-DEI moves as standard practice).

This study uses IRP to interpret the types of retrenchment that R1 universities have enacted since *The Chronicle* began tracking this data in 2023. Using IRP, we coded actions not just as policy changes, but as theoretically predictable institutional strategies for crisis management. Our categories include: symbolic retrenchment (e.g., vague public statements), structural retrenchment (e.g., office closures and reorganizations), financial retrenchment (e.g., budget reallocation or cuts), and ambiguous retrenchment (e.g., disqualification of student groups or offloading DEI labor into unofficial domains). The ambiguous retrenchment category captures actions that constrain DEI work through discreet or less visible channels. These include removing DEI websites without explanation, ending participation in public events like Pride parades, and displacing equity-related labor into the private sphere, requiring it to occur off campus or on personal time. In coding these cases, we often found the institutional ownership of the retrenchment difficult to locate, which itself illuminates the broader diffusion and marginalization of DEI work within university structures. Rather than overt reversals, these actions represent bureaucratic withdrawals that allow institutions to reduce their visible commitment to DEI while minimizing direct accountability.

Together, IT, ROT, and IRP offer a multi-level lens for understanding not only why retrenchment occurs, but also how it is enacted through patterned, racialized, institutional behavior. This framework grounds our typology and guides the hypotheses and coding strategies detailed in the methods section that follows. In addition, these theories provide a coherent analytical foundation for examining DEI entrenchment.

Methods

Data Source and Sample

The primary sources for the data we use in our study are: *The Chronicle of Higher Education's DEI State Legislation Tracker*, a site that monitors changes that U.S. colleges have made in response to anti-DEI legislation and political pressure, the *National Center for Educational Statistics' (NCES) Integrated Postsecondary Education Data System (IPEDS)*, 2023 *National Center for Science and Engineering Statistics' (NCSES) Higher Education Research and Development Survey (HERD)*, *Carnegie Classification of Institutions of Higher Education (CCIHC)*, and the *Council for Higher Education Accreditation (CHEA)*. These data sources are used to gather institutional and funding characteristics about our sample institutions, measures of political influence on institutions based on their state location, and the type of DEI retrenchment actions our sample institutions have engaged in through June 1, 2025.

We constructed the final sample of 176 Research Activity Designation Tier 1 (R1) institutions by starting with all 187 R1 universities and removing ten medical/health-science centers and one professions-focused institution identified in the CCIHC, as their student bodies and academic missions differ from the broader R1 landscape. The sample was then divided into two groups, one group of institutions that appeared on *The Chronicle's* tracker (OT) and those that did not, allowing us to compare descriptive statistics across groups and conduct associative analyses on the OT subset.

Variables

The appendix contains a full list of the variables and their respective coding. The variables for this study fall under four main areas that include: categories of DEI retrenchment actions, measures of institutional characteristics, measures of political influence, and measures of funding characteristics. Categories of DEI retrenchment actions only pertain to the OT group.

Changes to Some Levels of Categorical Variables. Due to the small frequencies in some of the levels of the categorical variables, some adjustments were made to analyze the associations between DEI retrenchment actions and institutional characteristics. For institution size, we combined the small and medium categories because only one R1 institution fell into the small category. Additionally, because many Minority Serving Institutions (MSI) subcategories (e.g., Hispanic-Serving Institutions (HSI), Asian American and Native American Pacific Islander-Serving Institutions (AANAPISIs) had very low frequencies, we collapsed them into a single binary indicator denoting whether an institution was an MSI or non-MSI.

Measures of DEI Retrenchment Actions. We conducted a thematic analysis in data deduction that aligns with our theoretical framework to create the categories of DEI retrenchment actions. We categorized the unique DEI retrenchment actions reported on the tracker by first organizing each unique action into nine themes (academic, neutrality, reallocation/redirecting, closing of campus entities, changing names of campus entities, erasure of DEI-related language, policing/surveillance, funding, and ambiguous). We then organized the nine themes into four main categories: structural retrenchment (e.g., office closures and reorganizations), symbolic retrenchment (e.g., vague public statements), funding retrenchment (e.g., budget reallocation or cuts), and ambiguous retrenchment (e.g., offloading DEI labor into

unofficial domains) which are informed by our theoretical framework, specifically IRP. Given the tracker's limitations in documenting all actions, an institution's absence from the tracker should not be interpreted as evidence of non-retrenchment. Rather, it reflects the limits of available data, which may underrepresent the full scope of institutional responses.

Measures of Institutional Characteristics. We include several institutional characteristics that are common key identifiers for R1 institutions. These characteristics are both categorical and quantitative variables used in the study. For the categories of institution size, CCIHC was used to categorize institutions by student population size. MSIs are institutions of higher education that serve high concentrations of students who, historically, have been underrepresented in higher education and funding is provided to these institutions through numerous federal agencies (Congress, 2025). While the U.S. Department of Education defines seven types of minority institutions; only two distinct types (Hispanic-Serving Institution (HSI) and Asian American and Native American Pacific Islander-Serving Institution (AANAPISI)) are represented in our OT sample with an additional category that represents institutions defined as both. Again, because of very low frequencies of MSIs in our sample we created a binary (MSI vs. non-MSI) overall MSI variable to consolidate these institutions. Land-grant status is an institutional characteristic that is designated by its state legislature or Congress to receive benefits of the Morrill Acts of 1862 and 1890, or the Equity in Educational Land Grant Status Act of 1994 (APLU, 2025). While the original mission of land-grant institutions has evolved, overall it remains to “provide a broad segment of the population with a practical education that has direct relevance to their daily lives” (APLU, 2025).

Measures of Political Influence and Funding Characteristics. Two measures of political influence were used in our study that include: governor party affiliation and anti-DEI state legislation (no legislation introduced, legislation introduced but not passed, legislation introduced and passed). Four measures of funding were used in our study that include: amount of federal funding for research and development, amount of state/local funding for research and development, and average net price for Title IV institutions funding, and amount the institution spends yearly on student services. The amounts for federal and state/local funding for research and development were acquired from the 2023 HERD survey. Average net price for Title IV institutions and yearly amounts that institutions spend on student services were acquired from NCES and IPEDS.

Data Analysis

Descriptive Statistics. Descriptive statistics were performed to provide an overall view of the characteristics of the 176 R1 institutions included in the overall sample as well as to compare statistics between the overall sample and the OT group. The descriptive statistics included frequency distributions, measures of central tendency (mean), and measures of dispersion (standard deviation). Table 1 shows descriptive statistics for both the overall sample and the OT group for all categorical variables. Table 2 shows descriptive statistics for both the overall sample and the OT group for all quantitative variables.

Associative Analyses. Only the OT group was used for our associative analyses between the DEI retrenchment actions and the other variables since this is the only group that engaged in DEI retrenchment actions. To determine association between the different DEI retrenchment action categorical variables and the categorical variables (institutional measures, funding

measures, political influence measures), chi-square test for independence was used for association analysis because of the categorical nature of both variables being analyzed. Because funding retrenchment actions and ambiguous retrenchment actions did not meet the minimum required expected frequency value of 5 for all chi-square tests, no statistically significant associations were considered. These results are presented in Table 6 and Table 7, located in the appendix.

To determine associations between the different DEI retrenchment categorical variables and the continuous, quantitative variables (funding, 2023 graduation rates (non-White), 2023 Fall enrollment rates (non-White)), the Kruskal-Wallis H Test was chosen because of the non-normal distributions of the continuous variables used in the study. This test assessed possible statistically significant differences between the two groups of each DEI retrenchment action variable (did not engage in action vs. did engage in action) on each continuous, quantitative variable. With significant outlier(s) that exist for each of the continuous variables, Kruskal-Wallis H Test is robust enough not to be sensitive to outliers (Schmidt, 2010). A p-value of 0.10 was used for both the chi-square test and Kruskal-Wallis H test due to the exploratory nature of our research, small sample size, and effect modification (Thiese et al., 2016).

Results

For Research Question 1, the 108 R1 universities in the OT group have engaged in all four categories of DEI retrenchment actions to varying degrees. The top two types of DEI retrenchment actions taken were symbolic retrenchment (72.2%) and structural retrenchment (56.5%). Since *The Chronicle* tracks these anti-DEI retrenchment actions through their own survey, media reports, and tips from readers; it is likely that symbolic and structural retrenchment

actions are represented more frequently because they are the most visible types of actions being reported. Funding and ambiguous retrenchment may be harder to detect because only senior administrators typically have access to this information, and these actions are often concealed from the campus community and the public.

Research Question 2 was answered using the chi-square test for independence results presented in Table 3 and Table 4, as well as the Kruskal-Wallis H test results presented in Table 5. Certain results listed in Table 3 were labeled as not meeting the required expected frequency count of 5 for the chi-square test and were eliminated from consideration for possible associations. Overall, structural retrenchment actions had the most statistically significant associations (6) with institutional, political influence, and funding measures that include: governor's party affiliation, institution size, control (public vs. private), state legislation, land grant status, and yearly expenditures on student services. Symbolic retrenchment actions were the only other type of DEI retrenchment action that resulted in statistically significant associations (5). This includes statistically associations with governor's party affiliation, overall MSI institution status, state legislation, 2023 graduation rates for non-White students, and 2023 fall enrollment rates for non-White students.

Limitations

This study has several limitations that should be considered. First, given that our sample only includes R1 universities the findings are not generalizable to other sectors of higher education which have different internal and external pressures. We excluded eleven large standalone R1 medical schools because their structures and cultures are significantly different from traditional R1 institutions. Further, our reliance on *The Chronicle's* DEI Legislation Tracker

as our only source for identifying retrenchment actions introduces selection bias issues. For instance, institutions with high public visibility may be overrepresented, while those enacting retrenchment more discreetly, without public disclosure, and/or are un-verifiable by the editors of the tracker may be underrepresented. Additionally, the tracker may not have captured the nuances of retrenchment activity across R1 institutions and/or ignored actions due to their own selection process.

A further methodological limitation is that the number and types of actions an institution engaged in may be correlated with the scale of its pre-existing DEI infrastructure rather than indicative of its culture or leadership. For example, universities that had more expansive DEI infrastructures prior to 2023 may have engaged in more retrenchment actions between 2023 and 2025, while institutions with fewer DEI efforts may have engaged in little or no retrenchment simply because there was less to roll back. As such, we cannot account for an institution's baseline commitment to DEI. Finally, the study employs a cross-sectional design, treating retrenchment activity between early 2023 and mid-2025 as a single temporal snapshot, which limits causal inference and constrains our ability to assess trends over time.

Lastly, the DEI tracker reports institutional changes as aggregated DEI actions although DEI is conceptually a framework with three distinct parts: diversity, equity and inclusion. Our coding treats DEI as one treatment of institutional activity. This is a necessary methodological limitation, as we do not disentangle whether any given retrenchment action primarily targets diversity (e.g., student or faculty recruitment), the distribution of opportunities and resources (e.g., programmatic funding or equity-related support structures), or the conditions of participation and belonging (e.g., inclusion-oriented practices or climate initiatives).

Discussion

The clustering of retrenchment in states with Republican governors and enacted anti-DEI legislation is illustrative of coercive isomorphism (DiMaggio & Powell, 1983). Institutions work to preserve economic and reputational stability in the face of political and financial threats. Retrenchment in states without formal anti-DEI laws suggests mimetic isomorphism, as universities emulate peer institutions in an effort to appear compliant with the changing socio-political landscape (DiMaggio & Powell, 1983). Thus, from an IT standpoint, DEI retrenchment is not random nor exceptional, but an ordered institutional response set forth during a racially politicized national moment. Baker's (2019) analysis of affirmative action bans in higher education illustrates the empirical continuity of these dynamics. Her study demonstrates that gubernatorial ideology, legislative design, and fiscal scarcity predicted whether states dismantled race-conscious admissions policies, showing how political and economic conditions shape the racial policy landscape of higher education. These same findings are evident in our work as R1 universities navigate coercive pressures that are political and economic and always racialized. Institutions are therefore not acting from an ideological standpoint that treats DEI as a structural imperative of the university, but from the pragmatic need to remain open, accredited, and fiscally solvent within a hostile policy environment.

These legitimacy-preserving behaviors carry racialized implications. Symbolic retrenchment operates as a colorblind ideological move that privileges meritocracy and neutrality, reaffirming the racialized institutional logics and institutional whiteness that underpin the university itself (Ray, 2019). In an environment where federal and state actors threaten to withhold funds and sanction institutions for maintaining and supporting DEI programs and

initiatives, retrenchment operates as a racialized survival strategy (Kamola, 2024, Ostrager et al., 2025, U.S. Department of Education, 2025). DEI thus remains vulnerable as a model for structural change as it was institutionalized less for its transformative potential than for its instrumental utility, as a compliance mechanism, reputational safeguard, and source of access to state and federal resources (Ahmed, 2012, Iverson, 2007, Ray, 2019, Stokas, 2023). DEI retrenchment, then, could be seen as a foreseeable outcome.

This study provides an initial overall landscape of DEI retrenchment actions using available information through June 1, 2025. Our work establishes a baseline point for future research that can dive deeper into this new racialized era in higher education. Longitudinal studies may better track DEI retrenchment over time as more information and data becomes available. Qualitative research studies can provide information on how internal decision-making is occurring at R1 institutions and inform scholars on how these decisions impact minoritized student communities. It is critical that further research into this new DEI retrenchment era occurs to better inform and equip stakeholders as funding is weaponized to undermine decades of work toward racial and social equity in higher education.

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APPENDICES

APPENDIX A

APPENDIX A: TABLE 1

Table 1. Descriptive Statistics for Categorical Variables

	Overall Sample (%) n = 176	On Tracker Sample (%) n = 108
Governor's Party Affiliation		
Democratic	46.0	42.6
Republican	54.0	57.4
Accrediting Organization		
HLC	28.4	31.5
MSCOHE	16.5	5.6
NECOHE	10.8	7.4
NWCCU	6.8	3.7
SASCOC	29.0	39.8
WASC	8.5	12.0
Institution Size		
Small/Medium	30.7	18.5
Large	46.0	49.1
Very large	23.3	32.4
Control		
Public	71.6	85.2
Private	28.4	14.8
Minority-Serving		
Overall MSI	25.6	29.6
Non-MSI	74.4	70.4
Land Grant Status		
Land Grant	31.8	38.0
Non-Land Grant	68.2	62.0
State Legislation Passed		
No legislation introduced	46.0	33.3
Legislation introduced but failed	18.8	19.5
Legislation introduced and passed	35.2	47.2
Institutions On Tracker		
Yes	61.4	
No	38.6	
DEI Retrenchment Actions		
Structural Retrenchment		
Yes		56.5

No	43.5
Symbolic Retrenchment	
Yes	72.2
No	27.8
Funding Retrenchment	
Yes	7.4
No	92.6
Ambiguous Retrenchment	
Yes	5.6
No	94.4

APPENDIX B

APPENDIX B: TABLE 2

Table 2. Descriptive Statistics for Quantitative Variables. Note. Values for all funding and total spent on student services are expressed in thousands.

Variable	Overall Sample n = 176		On Tracker Sample n = 108	
	M	SD	M	SD
Federal Funding	284,740.2	361,783.3	292,044.1	283,556.7
State/Local Funding	23,714.1	35,329.8	31,527.8	41,250.2
Title IV Funding	20,282.1	8,262.4	18,021.9	6,946.5
Total Spent on Student Services	36,100.0	25,700.0	38,100.0	28,200.0
2023 Graduation Rates (Non-White)	0.31	0.19	0.32	0.20
2023 Fall Enrollment Rates (Non-White)	0.37	0.18	0.37	0.20

APPENDIX C

APPENDIX C: TABLE 3

Table 3. Chi Square Test Results for Structural Retrenchment Action
Structural Retrenchment

	Taken		Not Taken		χ^2	p-value
	n	%	n	%		
Governor's Party Affiliation					15.35	0.000
Democratic	16	26.2	30	63.8		
Republican	45	73.8	17	36.2		
Accrediting Organization					36.56	0.000***
HLC	25	41.0	9	19.1		
MSCOHE	1	1.6	5	10.6		
NECOHE	0	0	8	17.0		
NWCCU	2	3.3	2	4.4		
SASCOC	32	52.5	11	23.4		
WASC	1	1.6	12	25.5		
Institution Size					5.84	0.054
Small/Medium	7	11.5	13	27.7		
Large	30	49.2	23	48.9		
Very large	24	39.3	11	23.4		
Control					4.86	0.027
Public	56	91.8	36	76.6		
Private	5	8.2	11	23.4		
Minority-Serving					0.20	0.648
Overall MSI	17	27.9	15	31.9		
Non-MSI	44	72.1	32	68.1		
Land Grant Status					2.76	0.096
Land Grant	19	31.1	22	46.8		
Non-Land Grant	42	68.9	25	53.2		
State Legislation Passed					23.29	0.000

No legislation introduced	11	18.0	25	53.2
Legislation introduced but failed	9	14.8	12	25.5
Legislation introduced and passed	41	67.2	10	21.3

Note: Findings with (***) do not meet required expected frequencies of at least 5. Significant at the $p < 0.10$ level.

APPENDIX D

APPENDIX D: TABLE 4

Table 4. Chi Square Test Results for Symbolic Retrenchment Action

	Taken		Not Taken		χ^2	p-value
	n	%	n	%		
Governor's Party Affiliation					8.67	0.003
Democratic	40	51.3	6	20.0		
Republican	38	48.7	24	80.0		
Accrediting Organization					8.09	0.151
HLC	22	28.2	12	40.0		
MSCOHE	4	5.1	2	6.7		
NECOHE	7	9.0	1	3.3		
NWCCU	2	2.5	2	6.7		
SASCOC	30	38.5	13	43.3		
WASC	13	16.7	0	0		
Institution Size					2.04	0.361
Small/Medium	16	20.5	4	13.3		
Large	35	44.9	18	60.0		
Very large	27	34.6	8	26.7		
Control					2.19	0.139***
Public	64	82.1	28	6.7		
Private	14	17.9	2	93.3		
Minority-Serving					3.35	0.067
Overall MSI	27	34.6	5	16.7		
Non-MSI	51	65.4	25	83.3		
Land Grant Status					0.51	0.476
Land Grant	28	35.9	13	43.3		

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Non-Land Grant	50	64.2	17	56.7		
State Legislation Passed					5.75	0.056
No legislation introduced	31	39.7	5	16.7		
Legislation introduced but failed	15	19.2	6	20		
Legislation introduced and passed	32	41.1	19	63.3		

Note: Findings with (***) do not meet required expected frequencies of at least 5. Significant at the $p < 0.10$ level.

APPENDIX E

APPENDIX E: TABLE 5

Table 5. Chi Square Test Results for Funding Retrenchment Action.
Funding Retrenchment

	Taken		Not Taken		χ^2	p-value
	n	%	n	%		
Governor's Party Affiliation					1.09	0.296***
Democratic	2	75.0	44	44.0		
Republican	6	25.0	56	56.0		
Accrediting Organization					5.82	0.324***
HLC	1	12.5	33	33.0		
MSCOHE	0	0.0	6	6		
NECOHE	1	12.5	7	7		
NWCCU	0	0.0	4	4		
SASCOC	6	75.0	37	37		
WASC	0	0.0	13	13		
Institution Size					1.99	0.370***
Small/Medium	0	0.0	20	20		
Large	5	62.5	48	48.0		
Very large	3	37.5	32	32		
Control					0.037	0.848***
Public	7	87.5	85	85		
Private	1	12.5	15	15		
Minority-Serving					3.64	0.056***
Overall MSI	0	0.0	32	32		
Non-MSI	8	100.0	68	68		
Land Grant Status					2.38	0.123***
Land Grant	1	12.5	40	40		
Non-Land Grant	7	87.5	60	60		
State Legislation Passed					5.77	0.056***

No legislation introduced	1	12.5	35	35
Legislation introduced but failed	0	0.0	31	31
Legislation introduced and passed	7	87.5	44	44

Note: Findings with (***) do not meet required expected frequencies of at least 5. Significant at the $p < 0.10$ level.

APPENDIX F

APPENDIX F: TABLE 6

Table 6. Chi Square Test Results for Ambiguous Retrenchment Action.

	Taken		Not Taken		χ^2	p-value
	n	%	n	%		
Governor's Party Affiliation					4.71	0.030** *
Democratic	0	0.0	46	45.1		
Republican	6	100.0	56	54.9		
Accrediting Organization					5.23	0.388** *
HLC	3	50.0	31	30.4		
MSCOHE	0	0.0	6	5.9		
NECOHE	0	0.0	8	7.8		
NWCCU	1	16.7	3	2.9		
SASCOC	2	33.3	41	40.2		
WASC	0	0.0	13	12.8		
Institution Size					1.78	0.410** *
Small/Medium	0	0.0	20	19.6		
Large	3	50.0	50	49.0		
Very large	3	50.0	32	31.4		
Control					1.10	0.293** *
Public	6	100.0	86	84.3		
Private	0	0.0	16	15.7		
Minority-Serving					0.04	0.838** *
Overall MSI	2	33.3	30	29.4		
Non-MSI	4	66.7	72	70.6		

Land Grant Status					0.06	0.810** *
Land Grant	2	33.3	39	38.2		
Non-Land Grant	4	66.7	63	61.8		
State Legislation Passed					7.1	0.029** *
No legislation introduced	0	0.0	36	35.3		
Legislation introduced but failed	0	0.0	21	20.6		
Legislation introduced and passed	6	100.0	45	44.1		

Note: Findings with (***) do not meet required expected frequencies of at least 5. Significant at the $p < 0.10$ level.

APPENDIX G

APPENDIX G: TABLE 7

Table 7. Kruskal-Wallis H Test Results for DEI Retrenchment Actions.

	Structural	Symbolic	Funding	Ambiguous
	Retrenchment	Retrenchment	Retrenchment	Retrenchment
	n = 108	n = 108	n = 108	n = 108
Federal Funding	ns	ns	ns	ns
State/Local Funding	ns	ns	ns	ns
Title IV Funding	ns	ns	ns	ns
Total Spent on Student Services	*	ns	ns	ns
2023 Graduation Rates (Non-White)	ns	*	ns	ns
2023 Fall Enrollment Rates (Non-White)	ns	*	ns	ns

Note: Associations not statistically significant (ns) if $p > 0.10$; Associations are statistically significant (*) if $p < 0.10$

CHAPTER THREE

GOVERNING DEI THROUGH STRATEGY TEXTS: A CASE
STUDY OF MONTANA STATE UNIVERSITYIntroduction

Over the past few decades, diversity, equity, and inclusion (DEI) have become a routine feature of U.S. higher education governance. Universities increasingly translate equity commitments into strategic plans, frameworks, implementation reports, and accountability metrics that specify goals, assign responsibilities, and define what counts as progress (Ahmed, 2012; Ball, 1993; Shore & Wright, 1999). These texts do not simply communicate institutional values; they help constitute the organizational reality in which DEI problems, solutions, and responsible actors are named and made governable (Iverson, 2008). As Iverson (2008) notes in her analysis of university diversity action plans, such documents “not only record and reflect a campus culture but also construct a particular reality for members of the institution” (p. 183). Through the language and logics of strategic organizational texts, DEI is translated into an administrable object of governance.

In this manuscript, I use critical discourse analysis (CDA) to examine how DEI is situated throughout three Montana State University, Bozeman (MSU) strategic texts, which include: the 2012 strategic plan *Mountains and Minds: Learners and Leaders*, the 2017 *Diversity and Inclusion Framework Report*, and the 2019 strategic plan *Choosing Promise* (including its 2023 amendments). Rather than evaluating whether these documents *work*, this study asks what kinds of equity problems these texts construct and how is DEI rendered legible and actionable through managerial rationalities associated with academic capitalism, audit culture, and

neoliberal university governance. This study addresses three questions: (1) How is DEI discursively constructed within MSU's strategic plans and policy documents? (2) What neoliberal governing rationalities and managerial techniques are mobilized to render equity actionable within these texts? and (3) How do these policies shape subject formation, such as inclusive leaders, resilient students, or responsible employees in ways aligned with neoliberal values?

MSU is a useful case study for this study because its strategic documents allow close analysis of how institutional language changes as DEI becomes more formalized and more tightly governed. Across the texts examined here, DEI appears in the 2012 strategic plan primarily as a broad institutional commitment rather than as a distinct object of governance, then becomes the focus of a dedicated campus-wide framework in 2017, and later is folded back into the university's main strategic plan through its 2019 *Choosing Promise* and its 2023 amendments. By tracing how DEI is translated across multiple strategic cycles, this manuscript contributes to an established body of scholarship on neoliberalism, academic capitalism, audit culture, and diversity discourse in higher education. Prior research has shown how diversity language can depoliticize inequality by displacing structural critique and transforming equity into a technical or cultural problem rather than a question of power and/or redistribution (Ahmed, 2006, 2012; Berrey, 2011; Iverson, 2007). Other work has documented how audit regimes and performance metrics shape university priorities, organizational behavior, and institutional subjectivities at the cost of alternative organizational forms and governing rationalities (Power, 1997; Shore & Wright, 1999; Strathern, 2000). This study extends these

conversations by examining how such dynamics are enacted through the everyday work of organizational strategic texts.

This study treats DEI as neither inherently emancipatory nor as merely cynical. Instead, it approaches DEI as an institutional domain whose meanings and effects depend on the governing logics through which it is enacted (Ahmed, 2012; Berrey, 2015; Brown, 2015; Byrd, 2022; Shore & Wright, 1999). When equity is rendered as a problem to be managed, it becomes subject to the same logics that organize other domains of university governance, such as efficiency, accountability, and performance management (Dean, 2010; Power, 1997).

Literature Review

This literature review synthesizes scholarship on strategic texts, DEI governance, and neoliberalism in higher education. To identify relevant work, I conducted targeted searches in Academic Search Complete, Google Scholar, Semantic Scholar, and Scite, and then supplemented those results with backward and forward citation tracking from core texts (e.g., Ahmed, 2012; Berrey, 2015; Iverson, 2008; Power, 1997; Shore & Wright, 1999; Slaughter and Rhoades, 2004). Searches emphasized publications from 2000–2025, while also including foundational works that shape the audit culture and neoliberalism literatures. I screened titles and abstracts for a clear higher education focus and prioritized sources that were highly cited, theoretically central, or directly examined DEI governance and strategic planning.

The review is organized in three parts. First, it examines scholarship on organizational strategy documents to show how these texts function as governance tools that set institutional priorities, norms, and values. Second, it synthesizes research that treats DEI as a routinized administrative domain shaped by neoliberal pressures, emphasizing how equity work is made

manageable through familiar categories and standardized practices. Third, it situates DEI within the literature on academic capitalism and audit culture to highlight how market logics and performance metrics shape what counts as legitimate equity work. Together, these sections provide the foundation for analyzing how MSU's strategy texts discursively construct and govern DEI.

Strategy Texts and the Governance of Higher Education

Organizational strategy texts are a type of document genre that contemporary universities use as governing tools. Organizational strategy texts include strategic plans and planning cycles, implementation frameworks, assessment and program review reports, accreditation narratives, budget and resource allocation narratives, policy guidelines, institutional dashboards, key performance indicators, and public strategy communications. Collectively, these documents represent institutional decision-making in ongoing documentation practices that make priorities, responsibilities, and outcomes legible and auditable to internal and external stakeholders (Power, 1997; Shore & Wright, 1999; Strathern, 2000).

Organizational strategy texts that focus on or include DEI commitments and initiatives do not offer neutral descriptions of existing inequities. Instead, these texts shape how inequity is produced and managed (Iverson, 2008; Power, 1997; Shore & Wright, 1999). They define which DEI issues are recognized as institutional problems while rendering others less visible and/or less administrable. Iverson's (2008) analysis of land-grant university diversity action plans demonstrates this process by showing how diversity is articulated through overlapping discourses of "marketplace, excellence, managerialism, and democracy" (p. 182). Iverson (2008) argues that this rhetorical coupling depoliticizes DEI by recasting it as a manageable and

institutionally safe project thereby taming DEI claims by absorbing them into prevailing norms of governance and legitimacy

DEI as an Institutionalized Domain

Within U.S. higher education, DEI can be understood as an institutional domain comprising multiple bureaucratic and administrative structures, including dedicated offices and roles, compliance infrastructures, training regimes, student success initiatives, climate and belonging efforts, and planning and assessment systems (Ahmed, 2012; Berrey, 2015; Shore & Wright, 1999). A central feature of this domain is routinization, through which DEI problems are appropriated into familiar and standardized categories (e.g., pipelines, climate, belonging), while solutions are stabilized through recurring and established institutional practices (e.g., trainings, toolkits, strategic initiatives, rubrics) that can be assigned and tracked through various reporting and documentation processes (Ahmed, 2012; Byrd, 2022).

The contemporary DEI domain in higher education emerged from the uneven wins and losses of affirmative action and multiculturalism, projects that expanded access and representation while also constraining social justice demands (Berrey, 2015; Ferguson, 2012; Iverson, 2008). After key legal and political turning points, including *Regents of the University of California v. Bakke* (1978) and California's Proposition 209 (1996), many universities abandoned corrective justice strategies and moved toward strategies emphasizing educational excellence, inclusion, and campus climate (Baker, 2019; Berrey, 2011; Felix & Trinidad, 2020). In contrast to earlier projects, the DEI domain consolidated equity claims into an administratively governable field that privileges forms of intervention that can be documented and audited, such as standardized trainings, assessment tools, and metrics, versus, redistributive

or structural challenges to institutional power and resources (Ahmed, 2012; Berrey, 2015; Iverson, 2007).

Many scholars argue that DEI is appealing because it is a flexible concept that is broad enough to win support across various stakeholders and easily adjusted through institutional governance processes (Ahmed, 2012; Berrey, 2011, 2015; Iverson, 2007; Morgan, 2022; Xiong, 2023). For example, Byrd's (2022) analysis shows that diversity is often treated as an empty signifier, allowing it to be merged or attached to a wide range of organizational goals (p. 4). This elasticity can create institution-wide buy-in, but it also establishes conditions under which equity claims are more readily governed as symbolic or procedural commitments than as redistributive demands. In recent years, the flexibility of DEI has become even more visible as universities face intensified political and legal pressures around this domain, exhibited by institutions rapidly reframing DEI in order to reduce risk and maintain institutional legitimacy.

Ahmed (2012) argues that DEI initiatives often function as non-performative commitments, in which institutions articulate equity goals without altering underlying power relations. Berrey's (2011) analysis of the University of Michigan helps explain how this gap emerges. This study shows that diversity gained broad acceptance when racial difference was reframed as cultural difference. Cultural difference was defined as a source of perspectives, experiences, and interpersonal learning that enriched the educational environment, shifting attention away from inequality as an outcome of structural and historical racism that would require forms of redress. This rebrand makes DEI easier to defend publicly and administer bureaucratically by directing DEI work toward lower-conflict activities (e.g., messaging,

programming, climate initiatives) while marginalizing reforms that would confront institutional power directly (Berrey, 2011).

DEI's flexibility is both a liability as well as a strength. In multiple states, public institutions have dismantled, restructured, or rebranded DEI offices, programs, and/or initiatives in response to legislative restrictions and federal executive actions, often shifting equity work into belonging or student success, and in some cases eliminating it altogether (Kamola, 2024). Rather than signaling a sharp break, these shifts reflect the impact of neoliberal governance. DEI is legitimate only insofar as it can be managed as a low-risk activity that protects institutional competitiveness and performance (Ahmed, 2012; Brown, 2015; Dean, 2010). Thus, DEI is always vulnerable to reconfiguration or retrenchment as legal, political, and cultural conditions shift (Ahmed, 2012; Dean, 2010; Power, 1997; Shore & Wright, 1999; Strathern, 2000).

Neoliberalism, Audit Culture, and Managing DEI

Neoliberalism emerged as an economic doctrine that prioritizes free-market competition and private enterprise as the most promising means of organizing economic life. Early neoliberal thinkers such as Friedrich Hayek and Milton Friedman argued that intervention in the economy was counter to an effective market and thus positioned competition, deregulation, and privatization as solutions to economic stagnation in the United States and other Western economies (Brown, 2015, 2019; Gilroy, 2010; Harvey, 2005). In its early formulation, neoliberalism articulated itself as a response to perceived growing economic crisis and the threat of global socialism (Harvey, 2005). Over time, neoliberalism became more than a set of economic policies. Many scholars argue that neoliberalism has evolved into a broader governing framework that reshapes institutions and social life (Brown, 2015, 2019; Dean, 2010; Giroux,

2014). Neoliberalism in higher education is often framed as a shift in governing rationalities whereby competition and measurable performance become central standards of institutional common sense, shaping how universities define value and justify their purpose (Brown, 2015; Dean, 2010; Slaughter and Rhoades, 2004). In this paradigm, universities are pressured to behave like business entities, competing for students, external funding, philanthropic dollars, and reputational status (Power, 1997; Shore & Wright, 1999).

In public universities, this governing logic is institutionalized through what Slaughter and Rhoades (2004) call academic capitalism. Academic capitalism is the way in which universities establish legitimacy through the routinization of economic behaviors such as revenue generation and measurable returns (Slaughter and Rhoades, 2004). Under academic capitalism, universities are compelled to monetize research, seek out private partnerships, and identify students as revenue-bearing units of human capital (Newfield, 2008; Slaughter and Rhoades, 2004). Scholars argue that this shift displaces the former democratizing and redistributive missions of higher education and redefines institutional purpose into what can be measured and defended as value-added (Brown, 2015; Newfield, 2008; Readings, 1996; Slaughter and Rhoades, 2004). Within this value framework, DEI is sustained when it is economically beneficial and targeted when it lacks return (Ahmed, 2012; Berrey, 2015; Brennan & Naidoo, 2008).

Strategic plans and DEI frameworks are central empirical sites for this study because they formalize and reproduce governing rationalities (Dean, 2010; Rose, 1999). These texts matter not because they reveal authentic institutional commitments, but because they define what institutions can promise, even when those commitments fall short in practice. Audit culture is central to this process by tying institutional credibility to verification and documentation. Power

(1997) theorizes audit culture as a social technology that both records performance and shapes the standards by which performance is judged. Similarly, Shore & Wright (1999, 2000, 2024) show how audit culture restructures academic work through accountability regimes that intensify surveillance and standardization, directing faculty and administrators toward quantifiable demonstrations of quality. These auditable outputs are the primary basis through which institutions justify their actions and secure legitimacy within higher education (Power, 1997; Strathern, 2000). As universities respond to audit demands associated with accreditation or performance-based funding, the production of documentation becomes even more central to maintaining resources and institutional standing (Brennan & Naidoo, 2008; Shore & Wright, 1999, 2000). Audit culture is especially consequential for DEI because it shapes which claims are recognized as legitimate and privileges interventions that can be formally quantified and justified through these processes.

Together, this body of literature demonstrates that DEI within higher education is an administratively governed domain shaped by strategic planning, audit culture, and neoliberal rationalities. Prior scholarship explains how equity is rendered visible through documentation, stabilized through routine practices, and justified through institutional metrics. Building on these insights, this case study traces how such logics are articulated and enacted in Montana State University's strategic texts, examining how they produce "DEI" as an institutional domain. The theoretical framework that follows draws on Foucauldian concepts of discursive practices, governmentality, and subject formation to read these texts as technologies of governance through which DEI becomes (re)produced in particular ways.

Theoretical Framework

This study adopts a Foucauldian framework to examine how diversity, equity, and inclusion (DEI) initiatives function as a regime of truth that renders DEI compatible with neoliberal institutional goals (Brown, 2015; Foucault, 1980). Rather than treating discourse as mere rhetoric, I approach it as a productive force that dictates what is often accepted as “common sense” (Foucault, 1972, p. 131) within the academy. To map this process, I utilize Foucault’s (1972) concept of discursive formation, the patterned regularities that unify disparate administrative statements into a coherent logic. This logic allows universities to constitute DEI as a governable object that can be managed through specific administrative genres (Shore & Wright, 1999), such as strategic plans and rubrics. These documents stabilize a narrow definition of DEI while authorizing specific actors to operate within that domain (Power, 1997; Shore & Wright, 1999).

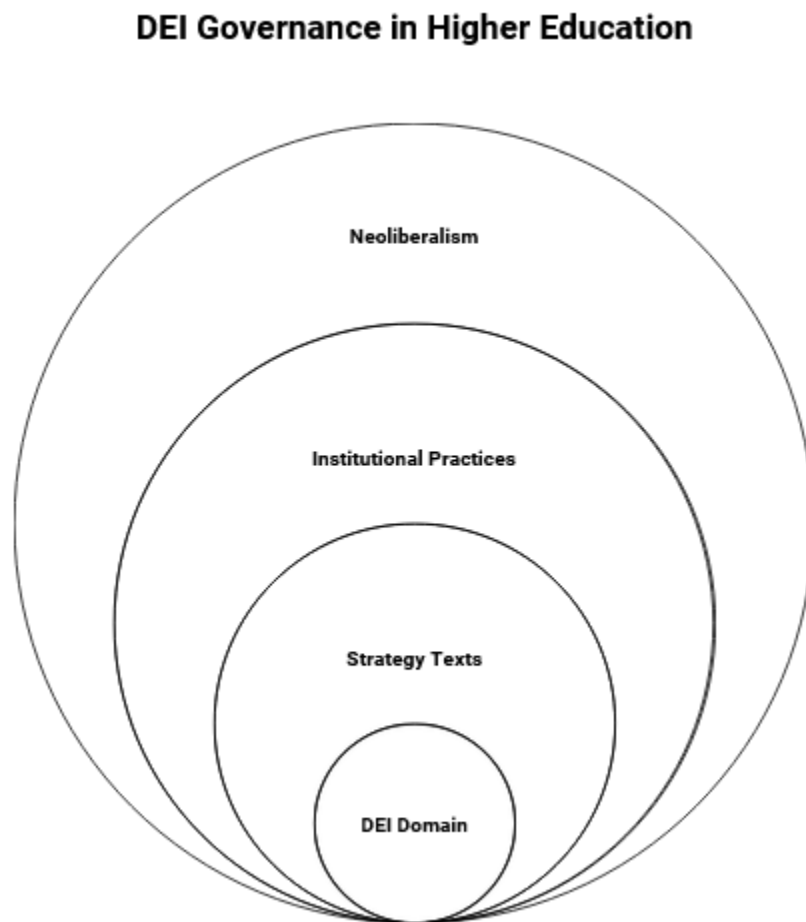
In contemporary higher education, the DEI domain requires ongoing monitoring and iterative improvement (Brown, 2015). Foucault’s concept of technique is useful here. Techniques are the mundane procedures through which power operates. They include the ways of seeing, recording, comparing, and correcting that make governance practical (Dean, 2010; Foucault, 1977). The DEI domain is a technology of governmentality insofar as it installs techniques that expand the institution’s capacity to know and manage populations. This is not accidental. It is consistent with neoliberal governance, which treats accountability and optimization as the criteria of good institutional action (Brown, 2015). Within such rationality, equity is prone to being governed as a continuous improvement problem rather than a political struggle over power and distribution.

This foregrounds subject formation as an outcome of these processes. Foucault's notions of disciplinary power emphasize how modern institutions produce subjects through visibility and everyday practices that render individuals and groups observable and comparable (Foucault, 1977). In higher education, this visibility is routinely produced through metrics and classificatory systems (e.g., demographic dashboards, retention and completion gaps, climate survey disaggregation, training completion trackers). These systems produce some groups as objects of intervention and others as their responsible managers. Institutional actors are also encouraged to become self-managing, coming to recognize organizational norms as reasonable and regulating their conduct accordingly. This means treating DEI work as a matter of professional responsibility (Foucault, 1991; Rose, 1999). The DEI domain contributes to this subjectivation by producing problematic subjects who must be known and acted upon. For example, students rendered "at-risk" via early-alert systems, predictive analytics, and persistence risk scores; minoritized students positioned through belonging and engagement measures that tie inequity to individual experience; employees constructed as needing remediation through mandatory training modules and competency checklists; departments judged through climate metrics and participation rates; and senior leaders evaluated through diversity benchmarks embedded in strategic plans and performance reviews (Foucault, 1977, 1991; Rose, 1999).

In this sense, DEI operates not only as a set of interventions aimed at certain populations, but also as a set of technologies of the self that call institutional actors to take up sanctioned discourses, making themselves legible as inclusive professionals (Foucault, 1988). These technologies of the self can be productive for some actors by providing language and institutional cover for more subversive or radical work, while simultaneously disciplining the

limits of the DEI domain. It is important to note that this is not a totalizing concept of power. For Foucault, power is relational and productive. In other words, it acts on actions, shaping what is possible rather than determining outcomes (Foucault, 1978, 1991). Institutional actors reproduce DEI governance by reinforcing institutional norms, often through mundane and unintentional routines, which is precisely why this reproduction is important. At the same time, institutional power always encounters forms of resistance, whether that be through overt pushback or more discreet subversions that interrupt or corrupt official governance (Dean, 2010; Foucault, 1978).

Figure 1. Conceptual framework.



Method

Critical Discourse Analysis

This study uses Critical Discourse Analysis (CDA) to examine how institutional language organizes power and governance. CDA moves analysis beyond a merely descriptive reading of policy toward a functional account of how texts construct social realities and naturalize particular rationalities of good governance (Fairclough, 2010; Wodak and Meyer, 2016). Using Fairclough's (2010) approach, I trace the marketization of public discourse in Montana State University (MSU) documents, including the colonization of the educational domain through market language that recasts students as consumers and reframes equity as an auditable object (Fairclough, 2010). CDA also offers the lens to connect micro-level textual choices (e.g., passive constructions that obscure agency) to macro-level institutional dominance. Following van Dijk (1993), the analysis centers on "the role of discourse in the (re)production and challenge of dominance" (p. 249). It also examines how DEI becomes actionable through managerial logics of audit culture and performance measurement (Power, 1997). Because "...power and dominance are usually organized and institutionalized," (van Dijk, 1993, p. 255). CDA helps map how strategic plans function as governing artifacts that stabilize neoliberal values as indicators of institutional competence.

To address the limits of a strictly discursive approach, I am also influenced by post-qualitative methods (Lather, 2016; Rosiek, 2021). Lather (2016) argues that the ontological turn foregrounds the incalculable subject as a "...counter to neoliberal and Big Data efforts to count and parse, capture, and model our every move" (p. 126). This shifts the analysis from coding fixed identities to tracing their becomings. In other words, thinking about what kinds of subjects

these plans attempt to produce and where those subjects become recognizable. Finally, the study adopts Rosiek's (2021) answerability as an ethical stance. Rather than claiming an all-seeing, neutral view, the analysis invites readers to consider how institutional language has material consequences (Rosiek, 2021, p. 241). Together, these methods show how DEI discourse is produced as an auditable performance and how it can "circumscribe the possibilities for change" (Iverson, 2007, p. 589), serving to operate as a non-performative that speaks commitments into being while leaving normative arrangements of power intact (Ahmed, 2012).

Data

Data Collection

The data for this study includes MSU's *Mountains and Minds* strategic plan (2012), its *Diversity and Inclusion Framework Report* (2017), and its *Choosing Promise* strategic plan (2019) and subsequent update (2023). Read together, they enable a longitudinal analysis of how DEI is articulated and revised through official planning for over a decade. MSU is a useful case because as a predominantly White institution (PWI) in the Rocky Mountain West, it shows how DEI must be framed and justified where White enrollment is the majority and functions as an institutional norm. In this context, equity commitments must often be rendered intelligible to White majority constituencies (Gusa, 2010). MSU is also temporally significant as the university embedded DEI as an institutional value in its 2012 strategic plan and then extended that agenda through a dedicated framework in 2017, both prior to the post-2020 intensification of DEI statements and initiatives (Chin, 2025).

Data Analysis

To begin data analysis, I conducted initial coding at the sentence level. This stage produced numerous codes capturing diversity, equity, and inclusion statements, proposed solutions, actors, responsibilities, institutional values, types of metrics, and recurring language associated with climate, belonging, access, excellence, and performance. I then grouped these codes into clusters based on similarities and overlaps (e.g., codes about campus climate and belonging; codes about metrics, assessment, and progress reporting). Finally, I developed themes by grouping codes into broader patterns that directly address my research questions: (1) how the problem of DEI is constructed, (2) what rationalities/logics underpin governance, and (3) how subject positions are produced.

Theme development was an iterative process in which I revisited key excerpts and compared how the same issues were framed across documents. Themes were developed across the texts because the documents operate as an intertextual policy assemblage. Where relevant, I note shifts in emphasis over time (2012-2023), but the primary analytic goal is to examine how DEI is governed across the full set of texts, not as standalone documents.

Trustworthiness and Limitations

Several choices throughout the data analysis process worked to strengthen trustworthiness. Sentence-level coding provided broad coverage of the data and helped limit cherry-picking after themes emerged. A documented trail of codes, clusters, and themes were maintained in spreadsheets, allowing claims to be traced back to specific excerpts. Cross document comparison tested whether themes held across the data or were confined to a single text. This analysis is limited by the nature of strategic plans and frameworks. As aspirational

texts that represent intended goals and plans, they are not direct evidence of implementation. As such, findings should be read as analysis of policy discourse and governing logics, rather than an evaluation of outcomes. Additional genres of institutional texts (e.g., HR policies, training modules, committee minutes, budget documents, public statements) could reveal further contradictions or reinforce the patterns observed here.

Findings

Montana State University's (MSU) strategic plans and DEI framework operate as a policy assemblage through which diversity, equity, and inclusion (DEI) are authorized, defined, operationalized, and stabilized over time. Across the documents, DEI is introduced as a mission-aligned domain tied to MSU's land-grant identity, which displaces institutional harm as the primary frame. In relation to the study's guiding questions, the findings show that MSU's strategic texts authorize DEI through narratives of continuity and progress, define it primarily through campus climate and conduct, and render it actionable through metrics, monitoring, and continuous review. In doing so, they also produce subject positions such as civil employees, adaptable students, and monitoring-oriented leaders, while deferring more material and structural commitments to lower-authority documents.

Finding 1: DEI Authorized Through Land-Grant Continuity and Progress

Across MSU's 2012, 2017, and 2019/2023 institutional strategy texts, land-grant identity is repeatedly mobilized to legitimize DEI as an expression of the university's public mission rather than as a response to specific institutional inequalities. In *Mountains and Minds* (2012), MSU introduces itself as "the state's land-grant institution" and frames higher education as a

public good tied to workforce preparation and economic mobility (Montana State University [MSU], 2012, pp. 1–2). Within this narrative, DEI appears not as redress but as long-standing mission work. In the document, “targeted efforts to increase diversity” are folded into increasing enrollment rates and expanding opportunity for minoritized students, both of which are articulated as beneficial to the institution and its students as a whole (MSU, 2012, p. 16). Diversity is introduced without reference to historical exclusion or present-day harm, but as consistent and continuous with what the institution already claims to do.

The 2017 *Diversity and Inclusion Framework Report* makes this authorization more explicit by situating DEI within a longer historical arc of national and institutional progress. In the opening pages of the President’s statement, diversity is traced from the Morrill Act’s expansion of higher education to “the sons and daughters of working families,” through later federal developments, including the integration of African Americans into higher education (MSU, 2017, pp. 2–3). These references function as milestones in a progress narrative. The statement then briefly situates this history in Montana by noting the state’s high concentration of tribal colleges, folding that fact into the same arc of advancement. In doing so, this section of the document treats racial exclusion and Indigenous dispossession primarily as historical backdrop, problems that policy milestones have addressed, rather than as the main features of the land-grant system. Absent from this account is the settler-colonial foundation of land-grant higher education itself and the financing of public universities through confiscated Indigenous lands. The statement pivots from a historiography to a governance story, asserting that “our nation’s understanding and definition of diversity has evolved and will continue to do so,” and that “the same is true for Montana State University” (MSU, 2017, p. 3). This teleological framing makes

DEI appear as an ongoing institutional refinement rather than as accountability work that requires naming harms or unresolved inequities.

The 2017 President's statement defines the purpose of diversity in a way that differentiates between the population DEI is oriented toward and the constituency it is ultimately positioned to benefit. The document first presents itself as "an important framework for addressing the needs of diverse students, faculty and staff" (MSU, 2017, p. 4), marking diverse individuals as the populations to be supported through DEI initiatives. However, the statement quickly broadens the rationale for DEI by shifting away from the needs of these stakeholders and toward the educational development of the student body as a whole. The text asserts that "very few of our graduates will spend their lives working and living in communities where everyone is just like them," and that the norm will instead be workplaces characterized by "rich blends of people" across social categories (MSU, 2017, p. 4). This rhetorical move reframes DEI as an institutional responsibility to minoritized communities into an educational resource that benefits all students. The passage ends with the claim that "by discussing, embracing, working on, and fostering diversity on our campus we enrich the lives of our students and prepare them for the world" (MSU, 2017, p. 4). This section constructs DEI as addressing the needs of those marked as "diverse," while leveraging their presence as a resource through which the institution prepares the rest of its student body for participation in a global workforce.

By 2019, the land-grant narrative functions as the institution's moral foundation and DEI operates as a source of institutional legitimacy. *Choosing Promise* opens with the declaration, "As the state's land-grant university..." invoking MSU's public mission as a taken-for-granted starting point rather than a contested or evolving commitment (MSU, 2019, p. 1). This framing

positions MSU's land-grant identity as its ethical anchor through which other priorities, including DEI, are justified. On the same page, inclusion is defined in the present tense as "we create a civil, supportive and respectful environment where difference and diversity are sources of strength" (MSU, 2019, p. 1). The use of the present tense makes the claim that inclusion is an already established institutional condition rather than a goal.

**Finding 2: DEI Defined as Campus Climate and Conduct,
Exposure, and Individual Responsibility**

Campus Climate and Conduct. In MSU's three strategy documents, DEI is framed less as a structural problem requiring institutional change than as a matter of campus climate and individual conduct. Two recurring concepts carry this framing. The first concept is hospitality, which is also expressed through terms such as welcoming, nurturing, embracing, and fostering. The concept of hospitality positions DEI as something already present in the campus environment. The second concept is civility, conveyed through terms such as civil, respectful, and supportive, which define how interactions within that environment should take place. Together, these patterns locate DEI in individual action and atmosphere. For example, in *Mountains and Minds* (2012), MSU describes itself as "a welcoming, adventurous community of students, faculty and staff" (MSU, 2012, p. 2). Welcoming is an already established institutional characteristic that shifts the focus of DEI work. If the campus is already welcoming, the task becomes maintenance versus an examination of who is welcome, who experiences exclusion, or through what institutional practices exclusion is reproduced. Further, who is responsible for creating, or maintaining rather, a welcoming environment moves from the institutional to the individual. This shift is reinforced in the values section, where "respect for diversity in all its dimensions" is carried out through "respect and civility," which "foster collaboration and open

communication” (MSU, 2012, p. 2). Here, diversity largely means the presence of difference, inclusion tied to behavior, and equity is folded into personal responsibility where if people are respectful, the institution can claim its success.

In the 2012 plan, DEI is not a distinct policy domain. References to diversity are dispersed across sections that discuss opportunity, access, learning, and engagement, most often tied to enrollment growth and student success metrics. For example, the plan sets targets to “diversify the student body” by increasing enrollment of Native American students, other underrepresented minority students, international students, and nontraditional students (MSU, 2012, pp. 18–20). These commitments are embedded within larger goals related to retention and graduation rather than framed as equity issues requiring changes to institutional governance or resource distribution.

The 2017 Diversity and Inclusion Framework Report formalizes DEI as a policy domain but repeats similar climate and conduct framings. Inclusion is defined as creating an environment that “welcomes, respects and nurtures” the campus community (MSU, 2017, p. 7), and the document’s first theme, “Campus Climate and Intergroup Relations,” sets its primary goal as “Create a civil, supportive and respectful environment where difference is a source of strength” (MSU, 2017, p. 8). While the framework points toward resource redistribution, many of its proposed actions are framed as recommendations rather than requirements. Many strategies are phrased as suggestions, such as “consider providing resources” to areas doing diversity work, departments addressing diversity in the curriculum, and to mentoring programs (MSU, 2017, pp. 8–9). This climate-centered definition is later carried into Choosing Promise (2019/2023), which defines inclusion as a commitment to “create a civil, supportive and respectful environment

where difference and diversity are sources of strength” (MSU, 2019/2023, p. 1). By aligning diversity with “strength” within a civil and respectful climate, the strategy affirms inclusion while leaving existing structures intact. Diversity is positioned as additive, non-disruptive, and compatible with institutional excellence rather than a prompt to revisit how and for whom excellence is defined.

Exposure. DEI is also justified through exposure. The 2012 plan argues that graduates must develop “global and multicultural understanding,” measured through participation in “cross-cultural study, work or service experiences” (MSU, 2012, p. 12). Here, diversity is treated as an asset that improves learning and prepares students to function across differences. Yet, simultaneously, expansion is paired with protection of quality. MSU commits to “expand educational opportunities while protecting the excellent quality of education” and to educate more students “while maintaining the quality of programs” (MSU, 2012, p. 1). The plan does not specify what, exactly, might be diluted, but the pairing assumes that as diversity increases, excellence must simultaneously be safeguarded. In other words, diversity is valued insofar as it does not threaten institutional quality.

Individual Responsibility. Defining DEI as a matter of climate, conduct, and exposure makes individuals responsible for inclusion through expectations of civility and professionalism. The governance of DEI produces distinct subject expectations. Faculty and staff are positioned as civil and self-regulating professionals whose everyday behavior sustains an inclusive climate. In *Mountains and Minds* (2012), MSU states that “each individual is personally accountable for his/her work and behavior,” explicitly tying inclusion to professional conduct rather than institutional arrangements (MSU, 2012, p. 2). Inclusion is framed as the outcome of appropriate

behavior, not as the result of structural change. Students, meanwhile, are positioned as adaptable and resilient subjects who benefit from exposure to difference: the plan emphasizes global and multicultural understanding and links it to cross-cultural study, work, or service experiences (MSU, 2012, p. 12). Diversity is constructed as something students learn to navigate and convert into preparedness for participation in diverse communities (MSU, 2012, pp. 2, 12).

This logic continues in the 2017 framework, where inclusion is defined as an environment that “welcomes, respects and nurtures” the campus community (MSU, 2017, p. 7) and the leading DEI theme prioritizes “Campus Climate and Intergroup Relations,” with the goal to “Create a civil, supportive and respectful environment where difference is a source of strength” (MSU, 2017, p. 8). These definitions locate the commitment to DEI in how people relate to one another and the kinds of climate they produce. At the same time, the framework places leadership into roles of coordination and support rather than mandates, even resource-related strategies are framed as discretionary (e.g., “consider providing resources...”) (MSU, 2017, pp. 8–9).

Lastly, *Choosing Promise* (2019/2023) further stabilizes these roles. Inclusion remains tied to behavior: “a civil, supportive and respectful environment” where “difference and diversity are sources of strength” (MSU, 2019/2023, p. 1). While institutional leaders are tasked with oversight through monitoring: MSU will “make and annually monitor progress on the 2017 MSU Diversity & Inclusion Framework themes” (MSU, 2019/2023, p. 8). The documents consistently produce subjects such as civil employees, adaptable students, and managerial leaders while institutional structures remain intact.

**Finding 3: DEI Rendered Actionable Through Auditability
and Continuous Improvement**

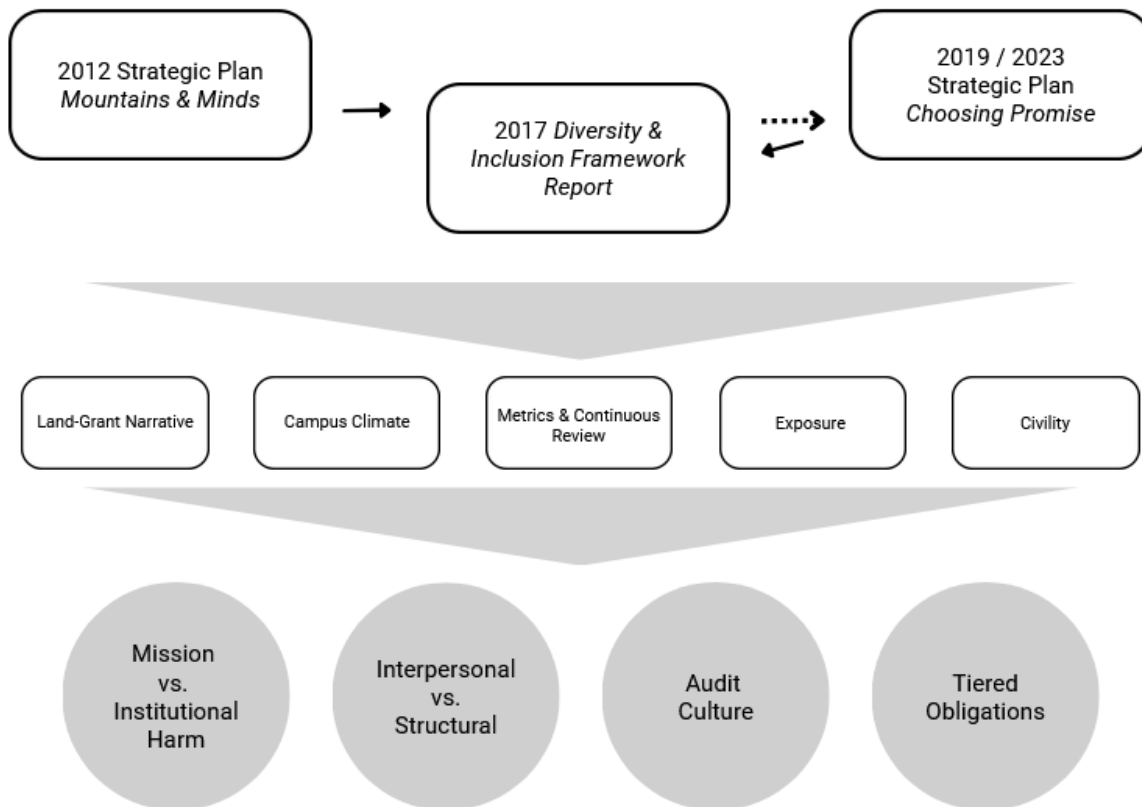
MSU translates its DEI commitments into institutional action primarily through measurement and assessment. In *Mountains and Minds* (2012), the strategic plan is organized around benchmarks, peer comparisons, and retention and graduation rates, with progress consistently defined through measurable outcomes (MSU, 2012, pp. 6, 18–20). In this document, “targeted efforts to increase diversity” appear within broader enrollment and completion goals, such as increasing participation among specific student populations and improving graduation rates (MSU, 2012, p. 6). The 2017 *Diversity and Inclusion Framework Report* describes itself as a “living document” and emphasizes ongoing review and annual measurement of progress (MSU, 2017, p. 6). It identifies specific tools such as campus climate surveys, focus groups, and related assessments as mechanisms for tracking inclusion and intergroup relations (MSU, 2017, pp. 8–9). While the document expands the language used to describe DEI, it also narrows how progress is recognized, rendering DEI visible primarily through specific documentation and standardized reporting.

The 2019 *Choosing Promise* strategic plan makes measurement central to how DEI is managed. It states plainly that “metrics help us measure progress” and commits MSU to “make and annually monitor progress on the 2017 MSU Diversity & Inclusion Framework themes” (MSU, 2019/2023, p. 8). The plan treats “monitoring” itself as the main institutional action, where progress is demonstrated by merely showing that the university is measuring, reviewing, and reporting on a regular schedule. DEI is governed through an ongoing loop of assessment, annual review, and updating, making continuous measurement the primary mechanism for institutional action (MSU, 2019/2023, p. 8).

Additionally, equity-related commitments in *Choosing Promise* are articulated mainly through student access and affordability metrics. The plan sets a target that “eighty percent of student financial need will be met by 2026,” framing equity as a matter of financial access and student support (MSU, 2019/2023, p. 3). It also commits to increasing enrollment of students “from underrepresented races and ethnicities” and to reducing retention and graduation gaps for those groups, (MSU, 2019/2023, p. 3). These commitments define equity primarily through data that can be tracked within existing institutional systems. At the same time, *Choosing Promise* (2019/2023) does not introduce new, explicit funding commitments for the DEI domain such as faculty work or programming. Instead, it defers much of that work back to the 2017 framework, promising to “make and annually monitor progress on the 2017 MSU Diversity & Inclusion Framework themes” (MSU, 2019/2023, p. 8), allowing the strategic plan to claim progress through monitoring, while pushing the substance of DEI action onto the lower authority document.

The 2017 framework itself has limited institutional leverage. Although it gestures toward resource redistribution, many strategies are framed as suggestions rather than requirements. For example, multiple actions are introduced with “consider providing resources...” to units already doing diversity work, to departments addressing diversity and inclusion in the curriculum, and to mentoring programs (MSU, 2017, pp. 8–9). The repeated use of “consider” softens institutional obligation whereby DEI commitment as resource allocation or structural change is raised as a possibility, not a mandate. As a result, the strategic plan is responsible for monitoring indicators, while decisions about structural shifts remain discretionary.

Figure 2. MSU's DEI Strategy Text Assemblages. This figure summarizes how DEI is formalized and governed through strategy texts. The figure identifies the major through-lines across the texts and the core tensions that organize this assemblage.



Discussion

Whether institutions develop DEI strategic plans proactively or in response to political pressure, accreditation demands, or reputational risk, the process of producing DEI strategy texts is a critical moment of institutional self-definition. Strategic plans do not simply describe institutional commitments; but they also communicate what kinds of DEI problems are recognized, what solutions are considered legitimate, and who is responsible for addressing them. As written representations of the university, DEI strategy documents make visible both

institutional values and the limits of institutional imagination. Examining these texts offers insight into how universities govern DEI and how power operates through everyday institutional practices.

Drawing on audit culture scholarship and Foucauldian governmentality, this study shows how MSU's three strategic texts construct DEI as an administratively manageable domain rather than as a site of structural accountability. Across the documents, DEI is made visible through governance techniques such as measurement and review cycles and governed through norms of civility. These governing rationalities align with broader neoliberal logics in higher education, where legitimacy is secured through audit culture and measurable performance indicators (Power, 1997; Shore & Wright, 1999; Brown, 2015).

At Montana State University, Bozeman, DEI is treated as a domain that the institution can manage through measurement and review. Across the strategic texts, "progress" within this domain is repeatedly framed as something MSU can demonstrate by tracking and reporting on a regular cycle. This approach is consistent with what some scholars define as audit culture where institutional legitimacy is produced through work that can be measured and reported (Power, 1997; Shore & Wright, 1999; Strathern, 2000). In *Choosing Promise* (2019/2023), this logic is explicit in the way the plan states that "metrics help us measure progress" and commits the university to "make, and annually monitor, progress on the 2017 MSU Diversity and Inclusion Framework themes" (MSU, 2019/2023, p. 8). Linking the strategic plan to the 2017 framework is a governance move. It positions the 2019 strategic plan (the higher authority text) as the site of MSU's formal responsibility, which is delineated as oversight and monitoring, while locating many of the more concrete, potentially resource shifting initiatives in a lower-tier document. The

2017 framework as a lower-authority strategic text, is bounded by discretionary language such as “consider providing resources ...” (MSU, 2017, pp. 8–9). It also reinforces an audit-oriented approach by directing units to measure progress annually, regularly assess campus climate, and monitor/respond to climate issues” (MSU, 2017, pp. 8–9). Intertextually, these documents create a division of labor where the 2019 strategic plan can credibly claim institution accountability through monitoring, while the framework is the site for actions that are framed as aspirational and, in practice, may be implemented unevenly.

This arrangement helps explain why DEI can be simultaneously highly visible in university strategy while leaving institutional practices largely intact. This is consistent with scholarship that shows how diversity planning is frequently coupled with institutional legitimacy and pre-determined governance logics. Iverson (2008), for instance, finds that diversity action plans often braid diversity into existing discourses of “marketplace, excellence, managerialism, and democracy” (p. 182) in ways that depoliticize and domesticate DEI, and appropriates it into existing institutional structures. Ahmed’s (2012) concept of non-performativity is useful here. She argues (2012) that diversity statements and policies do institutional work by declaring commitment, yet “the declaration does not bring about the effects that it names” (p. 117). In this sense, the very presence of diversity language can function as evidence that the institution is already doing the work, with zero need for structural change. Berrey (2015) similarly shows that organizational diversity initiatives often succeed precisely because they are framed as consensus-building and non-threatening. Diversity, she argues, becomes most sustainable when it is stripped of conflict and incorporated into an institutionally familiar routine that “affirm difference without

redistributing power” (Berrey, 2015, p. 27). At MSU, DEI is stabilized through contained visibility, monitoring, and planning, while its deeper issues remain.

Another implication of the findings is how DEI is repeatedly framed as a climate and conduct problem, which works to push the responsibility of DEI toward individual self-regulation and professional comportment. This pattern closely fits Foucauldian accounts of power that operate by producing self-governing subjects who internalize norms and regulate themselves accordingly (Foucault, 1977; Dean, 2010; Rose, 1999). DEI functions as a technology of governance that lives through individual conduct. This conduct centered framing also connects to scholarship arguing that civility depoliticizes inequality by treating conflict and power as matters of attitude rather than structure (Ahmed, 2006, 2012; Iverson, 2007). Civility not only tames DEI but it creates a governance disposition that is institutionally non-threatening. A university can widely demand professionalism and respect without resource distribution or structural change. The result is a DEI domain in which many solutions are merely business as usual. This is where the repeated “welcoming” discourse across the documents becomes useful. MSU defines itself as already welcoming, and it is the responsibility of individual actors to maintain that environment. This construction supports Ahmed’s argument about institutional speech acts that can function as both proof of DEI commitment while limiting what materially follows (Ahmed, 2012).

A final implication of the findings is that DEI is legitimated through a patterned link to MSU’s land-grant mission and excellence narratives. The land-grant story provides moral authorization for DEI without requiring acknowledgement of historical institutional harm or present-day inequality. This strategy aligns with scholarship showing that universities often

stabilize DEI by attaching it to already accepted institutional values and initiatives (Berrey, 2015; Brennan & Naidoo, 2008). At MSU, this connection legitimizes DEI but limits space for more disruptive questions about power, redistribution, and institutional accountability. Similarly, the excellence discourse works to frame DEI as a reassurance rather than as critique. Excellence is not framed as something to be redefined in relationship to equity but framed as something to be protected while DEI proceeds. This is consistent with critiques of neoliberal higher education showing that equality claims are most likely to be accepted when they can be translated into the institutional performance logics of competitiveness, productivity, reputational strength, and measurable outcomes (Brown, 2015; Slaughter & Rhoades, 2004). Within this construction the presence of diverse communities and individuals functions as an asset and a “source of strength,” enhancing learning for all and MSU’s reputation.

Implications for Theory, Method, and Practice

This MSU case shows that DEI can become a stable and visible institutional domain while remaining tightly bound by managerial, audit-based, and mission-aligned logics. When equity is framed primarily through climate, conduct, and monitoring, strategic plans may signal commitment without generating the obligations necessary for structural change. Unless institutions examine how DEI is made governable, and what that governance may foreclose, DEI strategies may continue to privilege institutional legitimacy and accountability over transformation.

Implications for Theory

This study contributes to scholarship on DEI, audit culture, and neoliberal governance in higher education by showing how institutional strategy texts organize how DEI functions as an operationalized arena within the university (Ahmed, 2012; Brown, 2015; Iverson, 2008; Shore & Wright, 1999). More specifically, the analysis identifies a mechanism of tiered obligation in which MSU's higher-authority strategic plan emphasizes oversight, measurement, and annual monitoring, while more concrete or potentially resource-shifting actions are located in a lower-tier framework document and expressed more softly, often as optional. The study also extends scholarship on the discursive legitimation of DEI by showing how, in the MSU texts, DEI is tied to land-grant mission, excellence, civility, and institutional strength rather than to redistribution or structural accountability. In this case, excellence is not reworked through equity but instead, it is positioned as something to be preserved while DEI proceeds, with diverse communities framed as a "source of strength" that enhances learning and institutional reputation.

Implications for Method

Methodologically, this study demonstrates the value of analyzing strategic plans, framework reports, and related institutional documents as distinct but connected genres. Reading these texts intertextually makes visible how authority, obligation, and implementation are distributed across documents rather than contained in any single text. In this case, that approach revealed that the 2019 strategic plan formalizes accountability through metrics and annual monitoring, while the 2017 framework contains many of the more substantive but less enforceable recommendations. Additionally, this study shows how critical discourse analysis treats institutional texts as governance technologies that define problems, assign responsibilities, and delimit action. This makes CDA especially useful for studying contested terrains such as

DEI, where the issue is not only whether a commitment appears, but how it is authorized and constrained in practice.

Implications for Practice and Policy

This study has implications for higher education researchers, practitioners, and institutional leaders involved in DEI planning and governance. Based on this analysis, I offer three recommendations for institutions developing or revising DEI strategy documents. First, institutions must not only articulate values or track progress but also clarify where decision-making power resides and what obligations accompany DEI commitments. Without clear lines of responsibility across planning genres, DEI work risks remaining aspirational and unevenly implemented.

Second, while interpersonal respect is important, treating inclusion primarily as a behavioral norm shifts responsibility away from institutional arrangements and onto individual actors. Leaders and practitioners must consider how civility discourse can depoliticize DEI by redirecting attention away from power, inequality, and structural conditions and toward tone, behavior, and professionalism. In the MSU texts, DEI is frequently organized through climate, conduct, and review rather than through structural accountability. As a result, inclusion becomes easier to administer, but harder to connect to redistribution, institutional power, or durable organizational change (Ahmed, 2012; Berrey, 2015). Third, institutions should examine how DEI is legitimated through progress and excellence narratives. In the MSU case, land-grant identity and excellence discourse present DEI as both mission-aligned and non-threatening to institutional quality. The strategic texts repeatedly pair inclusion language with assurances that educational and program quality will be maintained, while more structural actions are framed as

discretionary rather than required. In this form, DEI becomes institutionally safer, but that safety comes with a narrower horizon for structural change. Institutions committed to justice must therefore be willing to question how excellence is defined, for whom it is preserved, and at what cost.

Directions for Future Research

Future research should examine whether this pattern appears across other institutional contexts, particularly as colleges and universities navigate a changing DEI landscape marked by heightened political scrutiny, retrenchment, and legal uncertainty. It will be especially important to study how institutions revise, soften, or reframe DEI language under external pressure, whether similar patterns of tiered obligation emerge across institutional types, and how changing legal interpretations reshape the relationship between symbolic commitment and structural change.

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CHAPTER FOUR

THE STRATEGY OF DISCLOSURE: POSITIONALITY
STATEMENTS IN THE FIELD OF EDUCATIONIntroduction

Positionality statements offer a means for researchers to reflexively locate themselves in relationship to their projects in an effort to render their motivations, proximities, and potential blind spots more transparent. The inclusion of positionality statements in social science dissertations is a disciplinary prescription, albeit not formally required (Holmes, 2020; Sybing, 2022). However, in peer-reviewed education journals the inclusion of these statements is less obligatory. Call for papers and journal submission instructions do not require that authors include positionality statements although many authors do under a specific subheading and/or weave them into their methodology section. This manuscript identifies a gap between education's theoretical commitments to positionality statements and scholars' actual use of these statements in peer-reviewed education publications. The project analyzes research articles published between 2015–2024 in three leading higher education journals, *The Journal of Higher Education*, *Journal of Diversity in Higher Education*, and *Review of Higher Education*, to examine how authors use positionality, reflexivity, and trustworthiness as rhetorical resources. Rather than treating positionality statements as merely descriptive accounts of researcher identity, this study approaches them as rhetorical constructions that vary in structure, emphasis, and epistemic claims. In practice, these commitments often appear not only as standalone positionality statements but also as shorter moments of disclosure embedded in Methods and

trustworthiness sections. Throughout this manuscript, I refer to these moments collectively as disclosure language.

This study's dataset was constructed through a keyword-based retrieval strategy (positionality/reflexivity/trustworthiness terms) and therefore does not estimate the overall prevalence of positionality statements across all published articles. Instead, it examines variation within research articles that explicitly use disclosure language. The study first maps where and how disclosures appear (e.g., Methods subheadings, trustworthiness sections, embedded statements) and then analyzes the rhetorical strategies through which authors construct researcher positionality. By identifying patterned rhetorical strategies, this study clarifies how disclosure language functions within peer-reviewed higher education research.

Statement of Problem

In the social sciences, new scholars are trained to consider their subject positions in relationship to their field of study. Most often, this takes the form of a positionality statement that incorporates reflexivity and authenticity (Holmes, 2020; Sybing, 2022). Positionality statements are defined as arduous endeavors that require self-reflection and ownership of one's own biases and subject positions (Bourke, 2014; Holmes, 2020; Macfarlane, 2022; Milner, 2007; J. Rose, 2020; Sybing, 2022; Wickens et al., 2017). While scholars applaud the importance of reflexive positionality there is a simultaneous recognition that this endeavor is inherently flawed as subjecthood can never be fully represented and thus reflexive positionality can never be completely achieved (Bourke, 2014; Holmes, 2020; Milner, 2007; G. Rose, 1997; J. Rose, 2020; Secules et al., 2021; Sybing, 2022; Tien, 2019; Wickens et al., 2017). Despite their failings, in the social sciences positionality statements seem to be one of the best ways to address how

power and biases operate in and through academic inquiry. Thus, they are a frequently used analytical technique in which oddly there exists very little structural codification (J. Rose, 2020; Sybing, 2022). This lack of codification becomes more visible in peer-reviewed publishing, where positionality circulates across multiple synonymous terms and practices (e.g., reflexivity, trustworthiness, researcher disclosure) without clear genre boundaries or shared expectations.

While graduate students and new scholars are trained to create positionality statements, there is little formal requirement for these rhetorical devices in social science publications. Macfarlane (2022) argues that this gap may cause new scholars to employ reflexive positionality out of academic and disciplinary pressures instead of from a place of theoretical investment. This may result in scholars abandoning positionality statements once they begin publishing in a more robust way and/or utilizing them as merely a “declarative or curatorial” (Petzen, 2012, p. 293) strategy to self-identify as a reflexive scholar without methodologically doing reflexive work. Thus, I am interested in how positionality statements may allow proclamations about oneself and one’s work when those investments may be better articulated through the actions of a study’s design, conceptual framework, and analysis. In the context of journal publishing, this tension also raises a related question: when authors do include disclosure language, how do they rhetorically position it in relation to their research?

Statement of Purpose

The purpose of this project is to examine how positionality statements are utilized in published works in the field of education to identify and classify the rhetorical strategies through which disclosure language is constructed. This study examines disclosure discourse across a decade of research articles (2015–2024) in three leading higher education journals, *The Journal*

of Higher Education (JHE), *Journal of Diversity in Higher Education (JDHE)*, and *Review of Higher Education (RHE)*, to analyze how authors invoke positionality, reflexivity, and trustworthiness as rhetorical resources (Hampton et al., 2021; Secules et al., 2021). I use directed qualitative content analysis to classify rhetorical strategies within disclosure passages (Hsieh and Shannon, 2005), and because the analytic corpus was constructed through keyword-based retrieval (positionality/reflexivity/trustworthiness terms), this study does not estimate the overall prevalence of positionality statements across all published research. Instead, it examines variation among research articles that explicitly use disclosure language. The journals for this study were chosen because they are among the most highly cited journals in the field of U.S. higher education (Journal Rankings on Education, n.d.) and offer a sample of highly regarded new scholarship in the field.

Guiding Research Questions

1. How does disclosure language appear in research articles, and what terms are used to name it?
2. What rhetorical strategies characterize disclosure language in these articles?
3. How do the use and distribution of these rhetorical strategies vary across journals and over time (2015–2024)?

Theoretical Framework

This is an epistemological study that investigates how knowledge is produced and circulated. Postmodern theory is the theoretical lens of this project, as it assumes that knowledge is a discursive practice that is intimately tied, if not directly connected, to power (Foucault, 1977;

G. Rose, 1997). Given that this project is interested in how the discipline of education engages positionality statements in relation to power relationships between researcher/researched, and researcher/method, this lens is particularly productive (Milner, 2007; Wickens et al., 2017). Because this study examines disclosure language in peer-reviewed higher education journals, postmodern theory is also useful for tracing how positionality, reflexivity, and trustworthiness are taken up as discursive resources that render researcher location and credibility legible within publication (Fairclough, 1995; Wodak and Meyer, 2009). Additionally, this is an axiological inquiry that investigates the usefulness and value of an epistemological strategy in the social sciences. Thus asking, how disclosure language is rhetorically constructed within published scholarship and what forms of credibility it signals (Power, 1997; Strathern, 2000)?

This paper's theoretical framework relies on the notion that the formalities and disciplinary prescriptions of the field of education produces the expert/researcher subject position who brings with them a matrix of positionalities which impact their scholarly investments, design, and productions (Holmes, 2020; Milner, 2007). A researcher's positionality additionally influences the outcomes of one's investigation, as inquiry is never value free (Bourke, 2014; G. Rose, 1997). Equally important is that a researcher's subjectivity is not static but fluid and shaped by contexts, temporalities, structures, and power (Wickens et al., 2017). This project is interested in the relationships between disciplinary prescriptions and researcher investments by way of positionality statements. Here, those prescriptions are examined as they materialize in journal publishing conventions that shape how disclosure is formatted, located, and rhetorically framed across publications and over time (Sybing, 2022). This project assumes that the relationship between disciplinary prescriptions and researcher is not always top down but

rather relational and contextual (Foucault, 1977). Accordingly, disclosure language is treated as a genre practice negotiated within publication, rather than as a stable or codified requirement (Sybing, 2022; Wickens et al., 2017). Further, the rhetorical devices that authors employ in their positionality statements can impact the disciplinary conscriptions of education in ways that can then lead to new paradigms, ontologies, and epistemologies. At the same time, these devices can function as moves that seek to secure trustworthiness, manage bias, and align the researcher with recognizable norms of credible scholarship (Power, 1997; van Dijk, 1993).

Delimitations and Limitations

This study is limited to three highly cited peer-reviewed education journals that focus on higher education and that are published in the United States. It examines research articles published between 2015–2024 in JHE, JDHE, and RHE. These journals were selected as a focused, high-status sample of U.S. higher education scholarship, not as a comprehensive representation of education research as a whole. Future research could widen the scope by including international journals, other education subfields, and a broader range of journal types to see whether the same patterns hold. Additionally, this project analyzes disclosure language using a keyword-based approach (positionality/reflexivity/trustworthiness/self-location). Because the dataset was built by searching for these terms, this study does not estimate how common positionality statements are across all published research in these journals. Instead, it examines how disclosure is written and framed in articles that explicitly use this language. For that reason, the results should be interpreted as patterns in how disclosure is written and positioned within articles that use this language, not as evidence that articles without these terms are unreflexive. A related limitation is that keyword searching can miss disclosures that are present but described

differently. Articles may also embed positionality through study design, conceptual framing, sampling, or analytic stance without naming it as such. Examining those non-keyword forms of reflexivity would strengthen future work.

Key Concepts and Analytic Terms

The concepts and terms that are significant to this study include: positionality, positionality statement, reflexivity, disclosure language, disclosure passage, and rhetorical strategies. Positionality refers to the social, cultural, and political contexts that inform a person's identities and subjectivities, including racialized, gendered, and classed positions (Bourke, 2014; Milner, 2007). One does not have a singular positionality but multiple; positionalities are not layered or hierarchical but relational and intersectional (Rose, 1997). Positionalities shift depending on context, time, and place (Wickens et al., 2017). Positionality statements in the social sciences are a genre of writing that work to make a researcher's positionalities visible as they pertain to their topic of study (Holmes, 2020; Sybing, 2022). This study's point of departure assumes that positionality statements are varied in scope, practice, and utility.

In peer-reviewed publication, positionality may appear as a standalone statement, but it also circulates through similar terms, which this manuscript treats as part of a broader set of disclosure practices (Secules et al., 2021). Disclosure language refers to the parts of an article where authors describe their social positions, perspectives, and credibility using terms such as positionality, reflexivity, self-location, and trustworthiness. A disclosure passage is the specific segment of text in which these terms appear and is the primary unit of analysis in this study. Reflexivity is a posture in the social sciences that asks scholars to critically examine their subjectivities and assumptions; it assumes that research is never value-free and that scholars are

ethically bound to consider how their social positions shape the production of knowledge (Bourke, 2014; Rose, 1997). Positionality statements were born from the social sciences' move toward reflexive scholarship (Holmes, 2020; Milner, 2007). Lastly, rhetorical strategies are the concepts, terms, metaphors, qualifiers, and framing devices that researchers use as tools to communicate their positions and establish credibility (Fairclough, 1995; van Dijk, 1993). In this study, rhetorical strategies refer to classifiable ways authors frame disclosure passages when presenting researcher positionality, reflexivity, and trustworthiness.

Literature Review

Positionality and Positionality Statements

This study examines the rhetorical elements of positionality statements in peer-reviewed higher education publications in order to better understand how disclosure functions in the field of education. Here, the inquiry extends beyond standalone positionality statements to include reflexivity and trustworthiness language as part of a broader discourse of researcher disclosure circulating in journal publications. This literature review was constructed by bringing together scholarship on positionality and reflexivity in the social sciences. While earlier theoretical works are included to ground the study's conceptual framework, the review primarily draws on scholarship published between 2003 and 2024 to trace the key debates that shape this inquiry, including the utility of positionality statements, the limits of representing subjectivity, and the lack of consensus regarding how disclosure appears in published research.

Utility and Function

The utility and function of positionality statements in the social sciences vary widely, even though they are a highly used writing tool. Positionality statements are articulations of a researcher's subjectivity and their relationship to their topic of study, research participants, methods, and processes (Holmes, 2020). In the social sciences, positionality statements are tied to the acknowledgement that research is never truly objective but always framed through the lens and landscape of the researchers. Thus, rather than hide from this conundrum, researchers should make their subjectivities and investments transparent via a positionality statement (Bourke, 2014; Hampton et al., 2021; Holmes, 2020; Milner, 2007; Petzen, 2012; Relles, 2016; G. Rose, 1997; J. Rose, 2020; Secules et al., 2021; Sybing, 2022; Tien, 2019; Wickens et al., 2017).

It should be noted that there is a distinction between positionality and positional statements. Positionality as a mode of inquiry and tool of analysis has its roots in the works of scholars of color (particularly feminists and postcolonialists) such as Linda Alcoff, Paulo Freire, Stuart Hall, Patricia Hill Collins, bell hooks, Chandra Mohanty and other feminists such as Judith Butler and Donna Haraway (Bourke, 2014; G. Rose, 1997; Secules et al., 2021; Tien, 2019). Through the works of these and other scholars, a discursive practice emerged through the theorizing of structures, identity, contextualities, intersectionalities, and assemblages of power giving way to the concept of positionality. Everyone has a positionality, or better yet, everyone has positionalities that are fluid, contingent, and always already differed. In the social sciences, "positionality has been operationalized as reflexivity" (Secules et al., 2021, p. 21) to locate researchers in relationship to their inquiries, methods, questions, participants, and paradigms at large. Reflexivity is thus a process or method rather than merely a statement.

Positionality is in effect a deployment of reflexivity and thus positionality statements should be reflexive, albeit not all statements actually utilize this method. Holmes (2020) argues that “student researchers working towards a Ph.D. or Masters’ qualification in the social sciences are usually required to identify and articulate their positionality” (p. 1) and that positionality statements are “often formally expressed in research papers, masters-level dissertations, and doctoral theses” (p. 4). As scholars progress in their respective disciplines, positionality statements become less informally required. Nevertheless, it is assumed that positionality is an essential praxis to producing quality research, “the clear implication being that without reflexivity on the part of the researcher, their research may not be conducted ethically” (Holmes, 2020, p. 3). According to Holmes (2020), researchers that employ a reflexive approach accept the idea that “positionality not only shapes their work but influences their interpretation, understanding, and, ultimately, their belief in the truthfulness and validity of others’ research that they read or are exposed to” (p. 3). This reflexive approach is particularly urged when research focuses on minoritized and/or historically disenfranchised communities as a means to render the power relations at play more visible, regardless of the researcher’s insider/outsider position.

Problems with Representation

Minoritized and historically disenfranchised communities have long been misrepresented and overlooked in social science research, including in the field of education (Milner, 2007). When researchers are not reflexive about their own positionalities, we can easily reinforce the same oppressive structures that have historically worked to “other” the individuals and communities we are investigating. Milner (2007) warns, “when researchers are not mindful of the enormous role of their own and others’ racialized positionality and cultural ways of knowing,

the results can be dangerous to communities and individuals of color” (p. 388). I would argue that these dangers extend to other de-centered communities as well such as LGBTQ, folks with disabilities, and women. Reflexive positionality, however, is not limited to research that focuses on minoritized and historically disenfranchised communities. Many social science scholars argue that researcher reflexivity is needed across investigations and methodologies regardless of if it manifests into a positionality statement or not (Bourke, 2014; Hampton et al., 2021; Holmes, 2020; Milner, 2007; Petzen, 2012; Relles, 2016; J. Rose, 2020; Secules et al., 2021; Sybing, 2022; Wickens et al., 2017). However, with the numerous scholars that advance positionality as integral to social science research, interestingly there is no codified structure to the positionality statement in the social sciences (J. Rose, 2020; Sybing, 2022). As positionality moves into journal publication, it circulates across multiple labels, positionality, reflexivity, trustworthiness, self-location, without shared expectations regarding form, placement, or depth. Further, positionality as a discursive practice seems to be an elusive technique that hints more at the failures of representation and epistemologies of disclosure.

Positionality, for Whom?

In the social sciences, some argue that new scholars are trained to acknowledge their positionality and various subjectivities through positionality statements, but “there is little consensus regarding how authors should address positionality in writing for research publication” (Sybing, 2022, p. 1). Similarly, J. Rose (2020) laments that while positionality statements are “standard in qualitative research, there is not sustained development of the dynamic nature of positionality as a way to better understand, analyze, and theorize through a research project” (p. 1). Thus, while scholars argue that positionality statements and reflexivity

are essential to academic inquiry, they often simultaneously recognize the limits and paradoxes that these techniques produce (Bourke, 2014; Holmes, 2020; Milner, 2007; Rose, 1997; J. Rose, 2020; Secules et al., 2021; Sybing, 2022; Tien, 2019; Wickens et al., 2017). These authors argue that reflexive positionality is done in good faith to render the subjectivities of the researcher, the power relationships, the unequal histories, and structural inequalities of inquiry more transparent. But this good faith effort cannot guarantee that a researcher will produce quality and/or ethical work or that, we as researchers can even begin to know our own subjecthood let alone represent it through the constraints of language.

Wickens et al. (2017) argue, “reflexivity presumes the researcher’s capability to know and then make known their subjectivity in connection to the research context. This idea suggests that through proper research and scientific design, all things, including the human subject, are knowable” (p. 865). A knowable subjectivity requires stability, and must be constrained and contained in order to be affixed to a page, but subjectivity does not operate as a fixed category, its relational status upends itself in constant renegotiation. As Wickens et al. further illustrates:

Common uses of reflexivity draw upon this understanding and presume a modernist subject, one that is fixed, stable, and knowable (Lather, 2013). Thus, if that is the case, the researcher can reveal and should make known elements of her subjectivity, as they connect to the research, so these subjective elements can be judged and evaluated as well. However, as Pillow (2003) highlights, this raises important questions about exactly what subjective elements need to be disclosed: ‘How much do we need to know from or about the researcher to trust or believe what she/he is reporting? Where does the researcher/author begin and end in relation to the research and research subject?’ (p. 182). Nevertheless, it is assumed that through the use of standard reflexive methods that the researcher has been dutifully reflexive and these concerns are allayed (p. 865).

The issue becomes ever more complicated when we assume that true reflexivity can only be achieved through researcher vulnerability. This assumes that researchers can disclose their

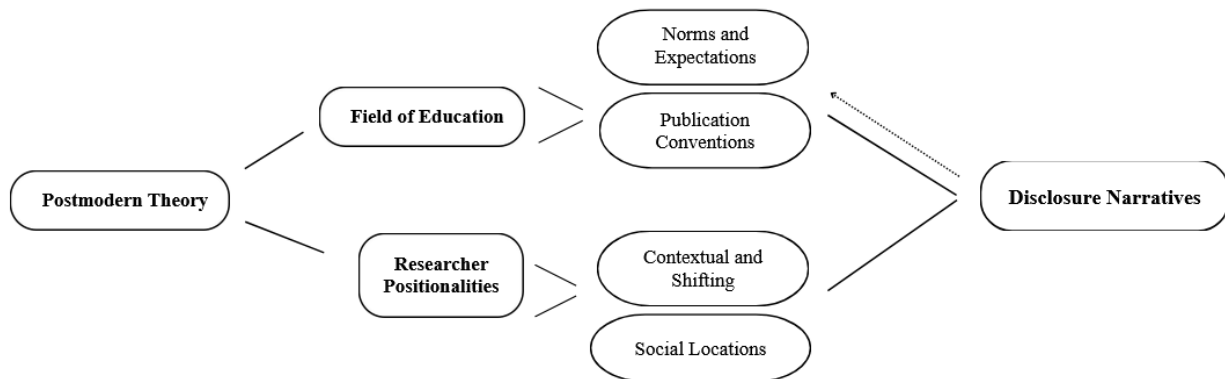
positionalities without recourse, that they themselves are outside disciplinary and perhaps punitive structures. However, for scholars who are members of marginalized communities and/or have circumstances that put them at risk, reflexivity may reproduce and/or further disenfranchise them within the structures of the academy (Hampton et al., 2021). In the context of journal publication, this tension raises an additional question: not only what should be disclosed, but how disclosure operates rhetorically to secure credibility, manage risk, and align the researcher with recognizable norms of scholarly authority.

This body of scholarship suggests that disclosure in peer-reviewed journals is neither uniform nor purely reflexive. It is shaped by disciplinary histories, genre conventions, risk structures, and accountability logics. Some disclosures may function primarily as signaling—brief acknowledgments of social location or bias. Others may be operational, explicitly tied to design, sampling, analytic stance, or epistemological commitments. Still others may invoke reflexivity while simultaneously closing down uncertainty through assurances of rigor and trustworthiness.

While Hampton et al. (2021) identify variation within a disciplinary context, the present study extends this insight by mapping patterns of disclosure placement and rhetorical strategy across journals and over time, and by examining how these strategies participate in broader legitimization practices within higher education research publication. Rather than treating positionality statements as static methodological features, this manuscript conceptualizes disclosure language as a negotiated genre practice—one that mediates between critical epistemological commitments and institutional demands for credibility, transparency, and accountability. These tensions raise an empirical question: how does disclosure language actually

operate in published higher education research, and what rhetorical work does it perform in securing legitimacy and authority within the field? To clarify how these tensions are conceptualized in this study, Figure 1 maps the relationships between the theoretical lens, disciplinary conditions, researcher positionalities, and disclosure narratives.

Figure 1. Conceptual Framework for Analyzing Disclosure Narratives in Higher Education Research. *Note.* This framework shows disclosure narratives as produced through the interaction of disciplinary expectations and researchers' positionalities. Anchored in postmodern theory, it treats disclosure as a negotiated practice shaped by established norms of knowledge production, while also recognizing its capacity to change disciplinary conventions through the creation of new epistemological framings.



Method

Research Design

This research project uses directed qualitative content analysis with a summative orientation to analyze disclosure passages in research articles published between 2015–2024 in *The Journal of Higher Education*, *Journal of Diversity in Higher Education*, and *Review of Higher Education* (Hsieh & Shannon, 2005). As Hsieh and Shannon (2005) note, a summative approach to qualitative content analysis “goes beyond mere word counts and includes latent content analysis” (pp. 1283–1284). In this study, keyword retrieval identified articles containing

disclosure language (e.g., positionality, reflexivity, trustworthiness), and analysis moved beyond term identification to interpret the “range of meanings” and “underlying contexts” (Hsieh & Shannon, 2005, p. 1285) through which disclosure is rhetorically constructed. This approach enabled differentiation among types of disclosure passages and supported classification of rhetorical strategies across journals and over time. As an epistemological inquiry concerned with how knowledge claims are justified in scholarly writing, the method allows for interpretation while remaining grounded in coding procedures.

Sampling and Sampling Procedures

This study uses purposeful critical case sampling (Patton, 2015). Three highly cited U.S. higher education journals were selected: *Journal of Higher Education* (JHE), *Journal of Diversity in Higher Education* (JDHE), and *Review of Higher Education* (RHE). JHE was selected because it publishes research broad in scope and method and functions as a flagship journal in the field. JDHE was selected because of its explicit focus on diversity and equity scholarship. RHE was included to expand the analytic frame to a journal historically associated with institutional and policy scholarship. These journals also differ in the kinds of methods they tend to publish. JHE regularly includes quantitative, qualitative, and mixed methods work. JDHE more often publishes qualitative and critical studies, particularly research focused on minoritized communities. RHE frequently includes policy, historical, and conceptual scholarship alongside empirical articles. Including journals with different methods allows this study to examine whether disclosure practices shift across publications where expectations for reflexivity are not the same. In the social sciences, positionality statements are more common, and more expected,

in qualitative and critical work (Hampton et al., 2021; Secules et al., 2021), and less routinized in quantitative research.

The purpose of this sampling strategy is not statistical representation but analytic focus. These journals function as influential disciplinary sites in which norms of reflexivity, trustworthiness, and scholarly legitimacy are articulated and circulated. Articles were identified through a systematic ProQuest database search conducted separately for each journal. The search included combinations of the following terms: positionality statement, researcher positionality, author positionality, self-location, researcher reflexivity, author reflexivity, reflexivity statement, and proximity searches linking positionality and trustworthiness. Searches were limited to peer-reviewed research articles published between 2015 and 2024. To be included, an article had to contain either (a) a standalone disclosure section or (b) an embedded disclosure explicitly articulating researcher situatedness, bias, insider/outsider positioning, or trustworthiness practices that explicitly linked credibility language to researcher self-location.

The timeframe of 2015–2024 was selected to capture a recent decade of higher education scholarship while allowing for examination of timeline shifts in disclosure practices. This period spans significant socio-political transformations affecting higher education, including intensified public debates about diversity, equity, and inclusion, the COVID-19 pandemic, and significant racial justice movements. While this study does not make causal claims about these events, analyzing a contiguous decade allows an examination of how disclosure language circulates and potentially evolves within changing disciplinary and institutional contexts.

Data Collection

Data collection and analysis followed an iterative, recursive process consistent with Creswell and Poth's (2018) spiral approach. Rather than proceeding linearly from collection to coding to findings, analysis unfolded through repeated cycles of reading, memoing, coding, and category refinement. As Creswell and Poth (2018) explain, in the spiral approach "the researcher engages in the process of moving in analytic circles rather than using a fixed linear approach" (p. 390). This recursive structure was particularly appropriate for an epistemological inquiry concerned with how knowledge claims are justified and rhetorically framed in scholarly writing.

Data Source and Article Selection

The ProQuest searches returned $N = 314$ results (JDHE: 217; RHE: 39; JHE: 58). Articles were then screened for the presence of explicit disclosure language addressing researcher positionality, reflexivity, self-location, bias, insider/outsider positioning, or trustworthiness practices. To be included, an article had to contain either a standalone disclosure section or an embedded disclosure passage in which authors explicitly articulated researcher situatedness or reflexive positioning. Articles that referenced reflexivity only conceptually such as citing reflexive methodology without self-location or disclosure were excluded. After screening, $N = 194$ articles were retained in the analytic dataset (JDHE: 118; RHE: 33; JHE: 43).

Table 1. Query Results by Journal (2015–2024)

Journal	Search Returns	Included in Final Dataset
JHE	58	43
JDHE	217	118
RHE	39	33
Total	314	194

Coding Procedures

All articles included were uploaded into NVivo to organize and code the data. Within each article, I identified disclosure passages and coded for basic descriptive information, including journal, publication year, methodological approach (qualitative, quantitative, mixed methods, or conceptual), topical focus, whether the study centered minoritized or historically marginalized communities, and where the disclosure appeared in the article: standalone heading, methods section, trustworthiness section, or embedded. This allowed me to compare patterns across journals and across time. Using directed qualitative content analysis (Hsieh and Shannon, 2005), I implemented theoretical and open coding techniques. From the literature review it was clear that certain key terms and concepts would be necessary to code: positionality, reflexivity, experience, identity, race, gender, class, bias, privilege, insider/outsider, and power. I utilized theoretical coding in my initial process while an open coding process unfolded through re-reading and memoing. From open coding, I derived the remaining identifiers: academic affiliation, academic rank, power, perceptions, invested, acknowledge, ensure, assumptions.

The positionality statements in this study varied in terms of length, organization, and placement. As Sybing (2022) noted, “variations indicate that participants in the academic publication process, whether they are the authors themselves or scholars reviewing the work, attribute differing degrees of importance to the articulation of positionality in ethnographic research” (p. 12). Additionally, this study confirms what past research has indicated, that a key marker of positionality statements is that they are processes of disclosure be that in the disclosing of sociocultural identities, researchers’ motivations, professional rank, and/or the scholars’ insider/outsider statuses (Hampton et al., 2021; Sybing, 2022). In moving beyond the content that marks positionality statements as a genre, I am also interested in the rhetorical strategies that

scholars implement within their positionality statements. As such, in the process of coding, categorizing, and deriving themes I utilized the summative content analysis approach to not just identify words used but to analyze the latent, connotative, and signifying meanings of writers' word choice and phrasing.

Theme Development and Classifications

In response to that framework, three themes were identified after coding and categorizing. These themes supported the development of two broad rhetorical strategy types in disclosure language: signaling strategies and operational strategies, with operational strategies further differentiated as open, closed, or hybrid. Signaling strategies consisted of short acknowledgments of researcher identity or positionality without explicit linkage to methodology. Operational strategies involved disclosures explicitly connected to research design, data collection, analytic process, or bias management. Operational strategies were further differentiated into open (reflexive language used while acknowledging that bias cannot be fully eliminated), closed (reflexive language framed producing assurance, such as minimized bias or established trustworthiness), and hybrid (language that acknowledged the limits of reflexivity while also describing specific steps taken to manage bias). Overall, the analysis proceeded recursively. Coding, memoing, and strategy classification were revisited as patterns emerged across journals and years. Rather than moving in a fixed linear sequence, the process involved returning to earlier cases to refine code definitions and strategy distinctions, consistent with Creswell and Poth's (2018) description of "moving in analytic circles" (p. 390). Table 2 presents the distribution of rhetorical strategies across the dataset.

Table 2 Rhetorical Strategies by Journal (2015–2024, N = 194).

Rhetorical Strategy Type	JDHE	JHE	RHE	Total
Signaling	36	13	5	54
Open Operational	49	22	16	87
Hybrid Operational	18	4	9	31
Closed Operational	15	4	3	22
Total	118	43	33	194

Several descriptive patterns are already visible in Table 2. Open operational strategies appear most frequently across the dataset, while hybrid and closed occur less often. The table also suggests uneven distribution across journals, with JDHE containing the largest number of disclosure passages overall. These descriptive patterns are examined in greater detail in the findings section.

Trustworthiness

To address the quality and trustworthiness of this project, I utilized three strategies: dependability, credibility, and confirmability. This project is dependable as the data analysis process was “logical, traceable, and clearly documented” (Nowell et al., 2017, p. 3) through extensive memoing. The results are credible as the analysis and findings were informed by the literature review and conceptual framework yet subject to change depending on the framework and lens of another researcher. For instance, a postmodern analysis of positionality statements is not the only lens to frame this data. If a researcher employed a positivist lens, then their codes, categories, and themes would be differently aligned and lay claim to knowable facts rather than resting in paradoxes and complexities. This project is also confirmable, as the “interpretations

and findings are clearly derived from the data” (Nowell et al., 2017, p. 3).and the connections between the data and the findings are clearly articulated.

Findings

Disclosure Placement

Across the dataset, disclosure language typically shows up as a short passage inside the Methods section rather than as a separate positionality statement. It is also commonly introduced with a subheading. Table 3 shows that this embedded placement is the norm in all three journals. Embedded disclosure is most common in JHE and RHE (88.4% and 90.9%) while JDHE includes the largest share of standalone disclosure sections (14.4%), but even there, most disclosures are still embedded in the Method section (75.4%).

Table 3. Placement of Disclosure Language by Journal (2015–2024). Note. “Unclear placement” includes disclosure passages located in sections such as the introduction/background, discussion/limitations, or disclosures distributed across multiple locations without a single primary placement.

Journal	Methods Section	Standalone Section	Trustworthiness Section	Unclear
JHE (n=43)	30 (69.8%)	10 (23.3%)	3 (7.0%)	0 (0.0%)
JDHE (n=118)	54 (45.8%)	28 (23.7%)	31 (26.3%)	5 (4.2%)
RHE (n=33)	16 (48.5%)	4 (12.1%)	12 (36.4%)	1 (3.0%)

Subheading Labels

Authors use a variety of titles to mark disclosure passages, and the terminology varies across the three journals. As shown in Table 4, while *Positionality* and its variations are common, no single label is used consistently across all publications. For example, in *JHE* *Positionality* is the most frequent subheading (34.9%), followed by *Researcher Positionality* (25.6%). In *JDHE*, *Researcher Positionality* is the most common choice (28.8%), though authors also frequently combine terms, such as *Trustworthiness + Positionality* (16.9%). *RHE* shows a similar pattern, where *Researcher Positionality* and *Trustworthiness + Positionality* are equally common (24.2% each). When authors do not use terms like *positionality* or *reflexivity*, they often choose descriptive headings such as *Research Team*, *Role of the Researchers*, or *Subjectivity Statement*. Regardless of the specific wording, these titles work to flag a specific space where the researcher describes their subjectivity.

Table 4. Disclosure Subheading by Journal (2015-2024).

Disclosure subheading label	JHE (n = 43)	JDHE (n = 118)	RHE (n = 33)
Researcher positionality	11 (25.6%)	34 (28.8%)	8 (24.2%)
Positionality	15 (34.9%)	20 (16.9%)	7 (21.2%)
Positionality statement	6 (14.0%)	9 (7.6%)	1 (3.0%)
Trustworthiness + positionality	3 (7.0%)	20 (16.9%)	8 (24.2%)
Reflexivity	0 (0.0%)	8 (6.8%)	0 (0.0%)
Trustworthiness	0 (0.0%)	9 (7.6%)	3 (9.1%)
Author positionality	2 (4.7%)	1 (0.8%)	0 (0.0%)
Unlabeled/none	4 (9.3%)	10 (8.5%)	2 (6.1%)

Other	2 (4.7%)	7 (5.9%)	4 (12.1%)
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Rhetorical Strategies

The findings of this study identified two rhetorical strategies that are utilized in disclosure language: signaling rhetorical strategies and operational rhetorical strategies. Operational rhetorical strategies can be further parceled out between open, closed, and hybrid. Open Operational strategies were most common ($n = 87$), followed by Signaling ($n = 54$), Hybrid Operational ($n = 31$), and Closed Operational ($n = 22$) (Table 2).

Signaling Rhetorical Strategies. Signaling rhetorical strategies consist of researcher self-location without an explicit linkage to methodology decisions. In these disclosures, authors make their standpoint, identity, or positionality visible, but they do not describe how this positionality was operationalized through analytic practices or credibility techniques/statements. Instead, the disclosure functions as a way to establish the author's relationship to the topic without discussion of how those factors influenced the study's results. For example, Garvey et al. (2019) locate their research team across intersecting social identities, noting that these “uniquely shape our relationships” with the population under study (p. 155). While the passage is identity disclosing, it does not move into a description of the specific research practices used to manage that reflexivity. Similarly, Tillapaugh and Catalano (2019) disclose their identities as members of the “LGBTQ+ community” and describe prior professional roles connected to the research context (p. 129). They highlight their connection with the study’s participants and do not connect this disclosure to how positionality was handled in the analysis. A comparable pattern appears in Walker et al. (2022), where the authors describe the composition of their research team,

disclosing race, gender, and experience with Black social media, thereby situating the researchers in relation to the topic without specifying how those identities structured analytic procedures or interpretive decisions (p. 721).

Operational Rhetorical Strategies. Operational rhetorical strategies are techniques that writers use in their positionality statements to explain *how* they have deployed their positionality in relationship to their study. Operational strategies can either be closed or open and what differentiates the two are the authors' understanding and use of reflexivity. Open operational strategies point to an action that the author has engaged in to demonstrate reflexivity such as memoing, journaling, peer debriefing, or creating field notes without determining a conclusive outcome from that reflexive method. This technique allows subjectivity to remain open, undetermined, resisting a desire to contain it within categorical statements. Closed operational strategies, contra open ones, point to a reflexive action but use that gesture to argue determined outcomes. Hybrid strategies capture disclosure passages that include both (a) open, process-oriented reflexive framing and (b) closed, assurance-oriented credibility framing, with neither clearly dominating the passage. Hybrid appears as a tension where authors acknowledge subjectivity as consequential while also leaning on trustworthiness language to stabilize that consequence but not as definitively as the closed operational strategy

Open Operational Rhetorical Strategies. Open operational strategies characterize disclosures where the researcher is positioned as an active, ongoing influence on the research process. In these passages, reflexivity is treated as a discursive practice that is influential throughout the research process rather than being something that can be resolved within the study. For example, Hill (2020) identifies himself as a "white, male" researcher who has been

embedded in the study's setting for years (p. 464). He frames his perspective as an important factor to the study, noting that he "constantly reflected upon [his] positionality... and the potential impacts on data collection and analysis" (p. 464). The rhetorical goal here is not to claim that bias has been eliminated, but to show that the researcher's location is an essential part of how the data was gathered. Similarly, Kelly et al. (2021) present reflexivity as a collaborative tool used to challenge their own interpretations. They describe using "each other as peer debriefers to recognize when our intersecting identities might be leading us to assume something... that we could not prove through the data" (p. 207). These authors discuss the limits of subjectivity and keep the researchers' subjectivities visible and under negotiation. Finally, Luedke (2020) operationalizes reflexivity through a relational approach. She explains how her background as a "multiracial Latina" informs "the ways I engage meaningfully with participants" and notes that she shared her "own educational journey" with them to help equalize power (p. 1177). In this framework, disclosure is treated as a relational practice that shapes the very nature of the inquiry.

Closed Operational Rhetorical Strategies. Closed operational rhetorical strategies are disclosures where researchers acknowledge their positionality while simultaneously emphasizing professional safeguards. The defining feature of this strategy is that positionality and subjectivity are treated as manageable risks that work to ensure methodological soundness. For instance, Gloria et al. (2017) identify as Latinas familiar with their participants' community but frame this connection as a factor to be managed for the sake of the study's integrity. They argue that addressing their positionalities was "critical to ensure trustworthiness" (p. 15) and that the team purposefully "addressed their biases... to ensure objectivity and validity" (p. 15). Similarly, Blake (2023) connects his "Black-Latinx" identity directly to a move of assurance, stating that his

background is "intimately connected" to the study (p. 293) but that he "mitigated the influence of [his] assumptions" through specific choices in research design and data analysis (p. 293). Finally, Nicola (2022) moves from disclosure to assurance by stating that she used "reflexive journaling throughout the study" to remain cognizant of her "insider–outsider" status and that she conducted member checks to "ensure that my bias did not lead me to draw inaccurate conclusions" (p. 706). Here, positionality is not simply acknowledged; it is rhetorically managed through claims that methodological choices contained its effects.

Hybrid Operational Rhetorical Strategies. Hybrid strategies represent a middle ground in researcher disclosure that pairs unresolvable subjectivity with epistemological assurances. In these passages, authors acknowledge that positionalities are significant and cannot be fully neutralized (open strategies), while also including language like "trustworthiness" and "rigor" to try and stabilize those perspectives (closed strategies). In hybrid disclosures, the researcher recognizes that while the self is an unavoidable part of the inquiry, its influence can be navigated through methodological commitment. For example, Foste et al. (2023) describe taking "intentional steps to ensure the rigor of the study, oftentimes referred to as trustworthiness," while simultaneously keeping their "own individual positionalities and subjectivities" in clear view as active factors in their consensus-building process (p. 580). The passage is not purely closed, as it does not claim to have solved positionality, yet it is not purely open either, as it grounds the researcher's lens in a specific framework of rigor. Similarly, Supplee and Orphan (2023) identify how their specific identities might "influence their interpretation of data" but connect this admission to describing how they worked to "mitigate" those biases (p. 529). In Pifer et al. (2024), the authors admit that "it was not possible for us to remove our biases and

interpretive lenses from this work," but then claim: "We aimed to recognize and manage them toward the goal of trustworthiness in findings" (p. 564). Ultimately, hybrid strategies mark the moments where researchers negotiate the tension between critical reflexivity and the institutional demand for scholarly authority.

Disclosure Trends 2015–2024

Disclosure passages were relatively uncommon in the first half of the decade and increased substantially in later years. Because annual counts were low in the early years of the study, year-by-year percentages can be unstable. To provide a clearer interpretation of these patterns, results are reported both by individual year in Appendix A and in three descriptive timeframes: 2015–2018, 2019–2021, and 2022–2024 (see Table 5). These intervals are strictly descriptive and do not suggest a specific causal break and they were chosen to reduce statistical noise and allow for clearer comparisons across the decade.

As shown in Table 5, the dataset includes 24 disclosure passages from 2015–2018, 69 from 2019–2021, and 101 from 2022–2024. In addition to the increase in frequency, the distribution of rhetorical strategies shifted over time. In the earliest period (2015–2018), disclosures were primarily Open Operational (41.7%), followed by Hybrid (25.0%) and Closed (20.8%). By the middle period (2019–2021), Open Operational remained the most frequent approach (47.8%), while Hybrid strategies remained stable (24.6%). In the final period (2022–2024), Open Operational continued to be the largest category (43.6%), but Signaling increased substantially, accounting for 37.6% of all disclosures, rising 12.5% in the first period.

Table 5. Distribution of Rhetorical Strategies by Period (N = 194)

Period	Signaling	Open Operational	Hybrid Operational	Closed Operational	Total
2015–2018	3 (12.5%)	10 (41.7%)	6 (25.0%)	5 (20.8%)	24 (100%)
2019–2021	13 (18.8%)	33 (47.8%)	17 (24.6%)	6 (8.7%)	69 (100%)
2022–2024	38 (37.6%)	44 (43.6%)	8 (7.9%)	11 (10.9%)	101 (100%)
Total	54	87	31	22	194

Beyond temporal shifts, the data revealed distinct differences in how journals utilize these strategies (Table 2). Open Operational strategies were the most common throughout the entire decade, their density was highest in the *Journal of Diversity in Higher Education* (JDHE), which contained the largest overall volume of disclosure passages (60.8%). *The Review of Higher Education* (RHE) showed the highest proportion of Hybrid Operational disclosures (27.3%). Additionally, the data show a notable decline in Closed Operational strategies as a percentage of total disclosures, dropping from 20.8% in the first period to 10.9% in the final period.

Discussion

This study examined how researchers disclose positionality across three leading higher education journals from 2015 to 2024, focusing on naming conventions, rhetorical strategies, and shifts over time. The central finding is that disclosure is not standardized. Authors use labels such as positionality, reflexivity, and trustworthiness, and no single term consistently organizes the practice across journals. Disclosure is rarely treated as a standalone section. More often, it is embedded within the Methods section or paired with credibility language about rigor and

trustworthiness. While disclosure passages increased substantially in the later years of the investigated time period, they function less as a formal requirement and more as a rhetorical practice. This variability is consistent with the literature reviewed earlier. Positionality statements lack structural codification in peer-reviewed publishing (J. Rose, 2020; Sybing, 2022), and reflexivity itself carries an inherent paradox whereby subjectivity is inherently unstable and never fully knowable (Wickens et al., 2017). The patterns in this dataset reflect those tensions. Disclosure, then, operates less as a methodological rule and more as a flexible rhetorical genre adapted to publication contexts.

Rhetorical Strategies and the Management of Subjectivity

The typology developed in this study illustrates how authors handle subjectivity. Signaling strategies make identity visible but stop short of specifying how that identity shaped the analysis. In doing so, they resist the assumption that subjectivity can be fully traced or offset (Wickens et al., 2017). Open operational strategies move further by linking reflexivity to concrete research practices while avoiding claims that bias has been eliminated. This approach aligns with positionality as praxis rather than declaration (Secules et al., 2021). Closed operational strategies frame reflexivity as an epistemological safeguard. As Wickens et al. (2017) argue, this type of framing presumes a “fixed, stable, and knowable” subject (p. 865). In this dataset, closed strategies represent the smallest category and decline proportionally over time. Taken together, disclosure language is not only about positionality, as it is frequently linked to trustworthiness and rigor claims, suggesting that it also serves a credibility function.

Journal Context

The variation in disclosure across these three journals confirms that no universal rule governs how researchers should present positionality. Instead, the patterns suggest that disclosure is shaped by journal-specific norms and expectations. From a Foucauldian perspective, these norms operate as disciplinary standards that shape what counts as acceptable reflexivity and credible scholarship within each publication. For instance, JDHE contains the highest percentage of open operational strategies, suggesting a set of embedded expectations that press authors to explain how identity and standpoint shape the research process. In contrast, RHE features the highest percentage of hybrid strategies, which may reflect a stronger demand to couple self-location with recognizable markers of rigor and evidence. Ultimately, these findings do not show that one journal is simply “more reflexive” than another. They show that reflexivity is formatted differently depending on the publication itself.

Temporal Shifts

The substantial increase in researcher disclosure, rising from 24 instances in 2015–2018 to 101 in 2022–2024, occurred during a period of significant transformation in the landscape of higher education. While this study is descriptive rather than causal, this growth corresponds with a series of major socio-political shifts that have challenged academia at large. The 2020 pivot, in particular, was shaped by the dual crises of the COVID-19 pandemic and racial justice movements sparked by the murder of George Floyd. These events highlighted systemic inequities within education and may have contributed to a professional environment where scholars feel greater pressure to be transparent about their own relationship to power and privilege.

In the years following 2020, the rise of signaling and open operational strategies occurred alongside a period of heightened public scrutiny and legislative debate regarding diversity, equity, and inclusion in academia. As higher education became a site of increased political contention, researchers may have used positionality statements as a way to negotiate their professional legitimacy within the field. By identifying their social locations, authors were navigating an institutional environment that increasingly sought a balance between critical reflexivity and traditional markers of professional credibility. Ultimately, the decline of closed operational strategies, which dropped from 20.8% to 10.9% over the decade, suggests a broader disciplinary trend away from portraying bias as something that can be contained through methodological steps. Overall, the data suggests that researchers are negotiating the paradox of subjectivity more openly, treating their positionality as a visible feature of their findings.

Conclusion

This study examined how disclosure language is named and positioned in higher education research articles, the rhetorical strategies authors use to articulate researcher location, and how these strategies vary across journals and over time. Prior research has identified positionality statements as forms of disclosure through which authors mark their situatedness in relation to their scholarship (Hampton et al., 2021; Sybing, 2022). This study supports that literature and also shows that disclosure in higher education research does not appear in one stable form. Across the three U.S. higher education journals examined here, 194 research articles included explicit disclosure language identified through keyword retrieval, and disclosure passages increased substantially between 2015 and 2024. Together, these findings suggest that

disclosure has become an increasingly visible rhetorical device through which scholars position themselves, justify knowledge claims, and negotiate credibility within publication.

Given the substantial increase in disclosure passages identified in this study, positionality statements have emerged as a significant site for examining how researchers negotiate their identities and their scholarship. While these statements are often intended to serve as a bridge between a researcher's situatedness and their reader, they also function as a mediation of professional legitimacy and authority. Take the high-profile cases of Kelly Kean Sharp, Jessica Krug, and Andrea Smith (just to name a few).¹ These academics claimed untrue racial identities resulting in the ability to claim 'insider' positionality in relationship to their research. Once their false identities were realized, outrage ensued and for good reason. These scholars were able to capitalize on academia's ongoing tensions around identity, particularly the unresolved questions of who is authorized to speak and, on whose behalf, often at the expense of others whose access to, and legitimacy within, the academy were/are already precarious. The nuances of these cases point to the paradoxes of identity and subjectivity, and I see positionality statements as being cut from the same cloth. Are positionality statements meant to guarantee critical reflexivity? Are they statements that work to bring closure to scholarly bias? Or, are they simply a means to acknowledge and move on? How are they implicated in the academy's desire to hold space for others when claiming the position of the other can often present a host of other issues? These questions become even more salient in a period marked by intensified scrutiny of diversity,

¹ Kelly Kean Sharp, was a scholar of African American history at Furman University, falsely claimed a Chicana identity resigned in 2020. Jessica Krug, a professor of Black history at George Washington, falsely claimed North African, Caribbean, and Bronx Blackness resigned in 2021. And Andrea Smith, an ethnic studies scholar at UC Riverside has been taken to task for years regarding claims that she has falsely identified as Cherokee.

equity, and inclusion initiatives and increased public debate about who is authorized to produce knowledge.

Contributions and Future Research

The theoretical contributions of this study indicate that positionality statements are important to the field of education. The research articles in this study that used a signaling rhetorical strategy acknowledge positionality and move on. They do not make specific claims about how their situatedness impacts their study, perhaps because they recognize that this is something that is always deferred. Authors that utilized the open operational strategy work to demonstrate that their reflexivity was actionable yet maintained openness to subjectivity's unfixability. Scholars that used the closed rhetorical strategy worked to fix their subjectivity in order to tame researcher bias. Hybrid strategies, identified in the expanded dataset, negotiated between these poles by pairing reflexive acknowledgment with language of rigor and trustworthiness, revealing the tension between critical reflexivity and institutional expectations of methodological assurance.

This study used directed qualitative content analysis to examine disclosure language in published research. This approach made it possible to identify patterns in how disclosure was named, framed, and distributed across journals and over time. Future research could build on this design by expanding the journal sample, including other methodological traditions and international contexts, and looking more closely at forms of reflexivity that may be present even when they are not captured through keyword searches.

Practically, the findings suggest that positionality statements do not serve one uniform function but operate as rhetorical choices through which researchers position themselves in

relation to knowledge production and the communities they study. Further research should also investigate how positionality statements mediate relationships between researcher and research subject or community, including questions of proximity, authority, insider or outsider status, and ethical accountability. As this study suggests, positionality statements do not resolve the instability of subjectivity so much as stage it, making them rhetorical sites where power, legitimacy, and accountability are negotiated within the conventions of academic publication.

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APPENDICES

APPENDIX H

APPENDIX H: DISTRIBUTION OF DISCLOSURE
STRATEGIES (2015–2024)

Appendix A. Distribution of Disclosure Strategies (2015-2024)

Year	Signaling	Open Operational	Hybrid Operational	Closed Operational	Total
2015	0	1	1	1	3
2016	1	0	1	2	4
2017	1	5	1	1	8
2018	1	4	3	1	9
2019	4	6	7	2	19
2020	4	13	3	1	21
2021	5	14	7	3	29
2022	16	13	3	2	34
2023	11	11	2	5	29
2024	11	20	3	4	38
Total	54	87	31	22	194

CHAPTER FIVE

CONCLUSION

Introduction

This dissertation has examined how higher education governs difference across institutional and scholarly sites. Its central finding is that when alterity confronts the university, it is not typically excluded outright but translated into administratively and professionally recognizable forms that preserve institutional legitimacy and continuity (Ahmed, 2012; Berrey, 2011, 2015; Iverson, 2007, 2008; Power, 1997; Shore & Wright, 1999). I refer to this process as the governance of difference. Across the three manuscripts, this process operates through a consistent set of mechanisms. First, difference is translated into categories that align with administrative priorities and organizational routines. Second, engagements with difference are tied to claims of institutional and professional credibility. Third, difference is stabilized through evaluative frameworks that render it measurable, monitorable, and reportable. Together, these mechanisms make difference sustainable within higher education only insofar as it can be governed.

This dynamic is especially significant in higher education because universities present themselves as sites of inclusion, critique, and democratic possibility while also working to reproduce organizational stability. Institutional theory helps explain this tension by showing that organizations secure legitimacy through recognizable practices that align with field-level expectations (DiMaggio & Powell, 1983; Meyer & Rowan, 1977). Yet legitimacy is not

distributed evenly across institutional commitments. Priorities such as retention, student success, and institutional effectiveness are broadly accepted as proper administrative concerns, while commitments tied to race, historical redress, structural inequality, and redistribution remain more politically vulnerable and ideologically contested (Ahmed, 2012; Berrey, 2015; Byrd, 2022; Ray, 2019). The governance of difference names how this uneven terrain is managed across institutional retrenchment, strategic discourse, and scholarly knowledge production. This concluding chapter synthesizes these findings, elaborates the dissertation's theoretical and empirical contributions, and outlines directions for future research.

Findings

The Governance of Difference Across Institutional and Scholarly Sites

The findings of this dissertation show that the governance of difference is embedded in the routine processes through which institutional actors manage risk, define priorities, and establish credibility. In this dissertation, *difference* refers to engagements with alterity, marginality, and otherness. Across this examination, those engagements are taken up through familiar administrative, strategic, and professional practices that make difference legible within the broader structures of higher education (DiMaggio & Powell, 1983; Power, 1997; Shore & Wright, 1999). In Chapter 2, this process appears through DEI retrenchment among R1 universities. The analysis shows that retrenchment follows patterned forms of institutional adjustment rather than isolated/singular responses. Universities narrow or abandon commitments through renaming, restructuring, defunding, and symbolic repositioning DEI while working to maintain institutional legitimacy in a hostile political environment. These responses demonstrate

how organizations recalibrate equity commitments in ways that protect the institution from political risk while reducing the transformative demands that difference can introduce.

In Chapter 3, the governance of difference appears in institutional strategy texts. The Montana State University case study shows that DEI is authorized through land-grant continuity, defined through climate, conduct, and workforce readiness, and made actionable through metrics and annual monitoring. In this setting, difference becomes legible through the administrative technologies of planning, evaluation, and performance measurement. Material commitments, especially those tied to resource allocation, are shifted into lower-authority documents. Chapter 3 shows that the governance of difference operates through strategic narrowing. DEI remains visible, but it is contained within forms that the institution can track, evaluate, and report, consistent with broader logics of neoliberal audit culture and administrative manageability (Ahmed, 2012; Iverson, 2007, 2008; Power, 1997).

In Chapter 4, the governance of difference appears in scholarly disclosure. The analysis of positionality statements shows that disclosure practices emerge unevenly across journals, years, and vary in form and placement. Within the journals examined, disclosure narratives help authors explain their relationship to their research while also demonstrating methodological responsibility and transparency. Positionality statements function as disciplinary signals of credibility without necessarily disrupting the epistemic assumptions or power relations that structure knowledge production (Holmes, 2020; Hampton et al., 2021; Secules et al., 2021).

Together, the findings show that difference gains institutional visibility and durability when it is appropriated into forms that higher education can recognize, evaluate, and justify. In that process, difference is tamed and co-opted into existing frameworks, where it can be

managed without requiring structural change. This is the broader pattern the dissertation identifies: higher education takes up difference while limiting its capacity to disrupt or transform institutional life.

Subject Formation and Credible Practice

As difference is taken up through administrative, strategic, and professional frameworks, it also produces certain subjects. Governance therefore operates through the production of *good* subjects as well as through the management of commitments. This pattern is especially visible in Chapters 3 and 4. In Chapter 3, institutional strategy texts shift much of the university's DEI work onto individual actors through conduct, civility, and personal responsibility. Institutions, therefore, produce subjects who are expected to perform the work of equity through everyday behaviors rather than through structural institutional change.

In Chapter 4, disclosure practices similarly produce the *good* researcher. Positionality statements introduce the author's subjectivity into the research process through the premise that subjectivity can be rendered transparent in writing. They therefore function as written performances of credibility, suggesting that articulating one's position in the text can make intention and epistemic accountability visible. The disclosure itself comes to stand as evidence that the researcher has sufficiently accounted for their relationship to power, bias, and knowledge production. What is rewarded, then, is reflexivity in a form that is institutionally legible within prevailing norms of academic legitimacy.

Drawing on Foucauldian perspectives on governmentality, these findings suggest that the governance of difference operates through dispersed forms of power that shape how individuals understand their responsibilities and present themselves as legitimate actors within institutional

and disciplinary settings (Foucault, 1977, 2007; Rose, 1999). Thus, the governance of difference works not only through institutional policy but also through the everyday production of responsible subjects who align their behaviors with prevailing institutional norms (Ahmed, 2012; Holmes, 2020; Iverson, 2007, 2008; Secules et al., 2021).

Contributions

Theoretical Contributions

This dissertation makes three primary theoretical contributions to scholarship on higher education and organizational governance. First, it introduces the concept of the governance of difference as a framework for understanding how institutions incorporate potentially disruptive forms of alterity. While existing scholarship has examined diversity regimes (Berrey, 2015), institutional diversity work (Ahmed, 2012), and racialized organizational processes (Ray, 2019), this dissertation demonstrates how similar dynamics operate across institutional governance, strategic discourse, and scholarly knowledge production.

Second, the dissertation bridges institutional theory and Foucauldian approaches to governance. Extending previous insights by showing that isomorphic pressures shape not only organizational structures but also the terms through which difference becomes intelligible and administratively managed (DiMaggio & Powell, 1983; Meyer & Rowan, 1977). In doing so, it demonstrates how institutional reproduction occurs not only through structural similarity but also through the domestication of forms of difference that exceed institutional recognition. Third, the dissertation contributes to scholarship on reflexivity and positionality in academic research. While disclosure practices are often framed as ethical or methodological commitments, the findings here show that they are also shaped by disciplinary standards of credibility.

Implications

The findings of this dissertation have practical implications for institutional leaders, DEI practitioners, and scholars. For institutional leaders, DEI language in strategic plans, mission statements, and official frameworks should not be treated as evidence of meaningful change. Institutions can make DEI highly visible while giving it little authority, few resources, or limited influence over decision making. DEI commitments should therefore be judged by whether they carry decision-making power, stable support, and a durable place in the organization. For DEI practitioners, the findings point to a persistent tension. Framing DEI through climate, civility, or compliance may help sustain the work, but it can also narrow its scope and weaken its ability to address power, exclusion, and structural inequality. Practitioners must therefore attend not only to whether DEI is implemented, but also to how it is defined and what that definition excludes.

For scholars, the findings show that reflexivity and positionality matter not only as methodological commitments but also as practices shaped by the norms of teaching, review, and reward. Even critical practices can become standardized in ways that make them more predictable and institutionally acceptable rather than disruptive. Lastly, colleges and universities can recognize and even reward certain forms of difference without changing the deeper structures that organize power. Equity work should therefore be judged not by its visibility, but by whether institutions are willing to redistribute authority and resources and change the conditions through which inequality is reproduced.

Limitations

This dissertation has several important limits. First, the manuscripts focus on official documents, formal arrangements, and published writing. This makes the project well suited to analyzing how responses to difference are formalized and made publicly legible. At the same time, it cannot fully account for informal practices, private conversations, backstage decision making, or everyday acts of resistance that occur outside those visible arenas. As a result, the dissertation is better able to explain how the governance of difference is institutionalized than how it is interpreted, negotiated, contested, or disrupted in everyday practice. Second, the empirical cases represent only part of the higher education landscape. The retrenchment analysis focuses on R1 universities, the case study centers on a single land-grant institution, and the journal analysis draws from a limited set of disciplinary publications. These cases are useful for examining how governance operates, but they do not capture the full range of institutional settings across higher education. Third, the dissertation examines these dynamics during a particular political moment marked by intensified scrutiny of DEI initiatives. Changes in law, politics, or institutional governance may alter how universities take up and manage difference over time.

Future Research

This dissertation points to several directions for future research on the governance of difference in higher education. Given that this study shows how institutions absorb, narrow, and manage difference across contested settings, future research can ask where that process remains stable, where it breaks down, and what those breakdowns make possible. One important

direction is comparative research. The governance of difference is unlikely to operate in the same way across all institutions, policy contexts, and organizational settings. Future studies could compare how contested issues are managed across institution types, regions, political climates, and governance structures. Such work could examine whether some settings are more open to claims centered on redistribution, historical redress, or structural change. Comparative research would help clarify where the governance of difference is most rigid, where it is more flexible, and what conditions shape those differences.

Future research should also pay closer attention to how people respond to the governance of difference from within institutions. Power does not move in only one direction. Students, faculty, staff, and administrators can contest, refuse, and redirect institutional efforts to contain difference. Future studies could examine how individuals and groups create openings through protest, coalition building, alternative forms of knowledge production, or informal networks. This would shift attention to the ways people inside institutions create cracks in dominant arrangements, even when the institution is trying to reduce, neutralize, or erase difference.

Similarly, research could continue to examine how the governance of difference operates within scholarly life. This includes questions about how academic expectations vary depending on the topic under study and the researcher's own racialized, gendered, or minoritized position. For example, asking whether scholars from minoritized groups are more frequently account for their relationship to topics such as race, gender, migration, or inequality, and whether similar expectations apply to dominant-group scholars studying those same issues.

Concluding Reflections

Across institutional retrenchment, strategic discourse, and scholarly disclosure, this dissertation demonstrates that higher education rarely rejects difference outright. The governance of difference helps explain how universities can simultaneously affirm commitments to diversity and equity while maintaining institutional arrangements that limit structural transformation. Understanding this dynamic is essential for scholars and practitioners seeking to explain why diversity initiatives remain highly visible in higher education even as deeper institutional change remains uneven and contested.

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