The IE "Scorecard:" Long-term Planning for Inclusive Excellence

What is "Inclusive Excellence?"
See UW-System's summary here: http://www.wisconsin.edu/vpacad/Inclusive_Excellence/index.htm

What is this "Scorecard?"
The "scorecard" below answers UW-L's need for a **unit-level, long-term planning structure for the Inclusive Excellence initiative**. The UW-L IE Implementation Task Force heard, through conversation with department chairs and other heads of units, that strategies for engaging in Inclusive Excellence were needed. The team identified the goals categories framework of the "Inclusive Excellence Scorecard" developed by the American Association of Colleges and Universities (AAC&U -- the "inventors" of the Inclusive Excellence initiative) as the most appropriate framework for our campus. UW-L's team then identified several possible UW-L-specific goals under each of AAC&U's larger goals categories, and then identified a UW-L-specific means to gauge a unit's progress toward that goal. Use it as a means to generate ideas for goal-setting and as a planning process to monitor the usefulness of changes.

The team bore in mind that AAC&U's Inclusive Excellence initiative focuses exclusively on *student learning*, whereas UW-L has broadened the idea of Inclusive Excellence to include workplace issues. Because many units directly serve students and thus play very specific roles in student learning, the team decided to retain the original goals categories from AAC&U: access and equity, diversity in the formal and informal curriculum, campus climate, and student learning and development. But because UW-L is committed to an excellently inclusive workplace, the chart below also offers examples of goals and gauges of progress that address workplace issues, whether the unit directly serves students or not.

In order to facilitate planning even further, the two individual-level planning tools that our campus has developed (the Inclusive Excellence Inventory of Instructor Practices and the IE Self-Developer for non-instructional staff) match up with these same four categories.

What do those four categories mean?

1. **Access and Equity:**
   AAC&U describes this category as "Paying attention to compositional numbers and status, reduction of barriers to participation, and achieving equitable success levels across groups." These ideas apply whether the unit focusses on students or on workplace.
2. **Diversity in the Formal and Informal Curriculum**:
   AAC&U describes this category as "Including diversity content in courses, programs, and experiences across the various academic programs and in the social dimensions of the campus environment." While UW-L does not have a "curriculum" for employees, units could establish goals that help them learn about new populations by taking advantage of the university's programming.
3. **Campus Climate:**
   AAC&U describes this category as "Developing a psychological and behavioral climate supportive of all students." For workplace issues, units could substitute "employees" for "students."
4. **Student Learning and Development:**
   AAC&U describes this category as "Assuring that students acquire content knowledge about diverse groups and cultures, and develop cognitive complexity." For workplace

The chart below then identifies possible forms of evidence that units could monitor in order to determine when they have accomplished a goal. It thus offers a wealth of ideas to guide change, intentionally broad enough to be used by academic departments as well as other units. By choosing among a large range of

possibilities, the chart allows considerable flexibility to select the goals that best fit a particular unit's major functions, strengths, and opportunities for professional development.

How should we use this "Scorecard?"

In general, here are the steps we recommend:

1. Determine which of the four goals categories you'd like to work on. You might wish to use one of the additional planning tools available to you to help you determine where you want to focus your efforts (see the links in the section below). You might, of course, decide that you want to work in more than one goal category.
2. Set some specific, reasonable goals to work toward over a particular period of years. The additional planning tools suggested below can help you identify specific goals, as can the "Sample Indicators and Documentation" column in the table below. Also, perhaps your unit can identify a speicifc population you would like to serve better.
3. Figure out how you will gauge your progress (see "Sample Evidence" in the table below).
4. Brainstorm some ways to address the goals you have set. Prioritize those ideas, and choose one or two to implement first.
5. Collect data using the gauge you've identified in Step 3. This is your starting point (your "baseline") so you know how far you've come when you check again later.
6. Implement your initial ideas.
7. Collect new data using the gauge(s) you identified in Step 3. Did your ideas have the effect you wanted to see? Did you get enough change? If not, try to understand why. Based on your analysis, return to step 4. If your ideas had the desired effect, start at step 1 and choose new goals.

What other planning tools are available?

The Inclusive Excellence Inventory of Practices for Instructional Staff captures the research literature on good practices. You can get to it from here:
https://sites.google.com/a/uwlax.edu/catl-ie/

The Inclusive Excellence Self-Developer for Non-Instructional Staff provides ideas for individual engagement in the IE Initiative. Use it here:
https://uwlacrosse.qualtrics.com/SE/?SID=SV_71l5BKPLfMSNr6d

UW-L's IE Planning Scorecard[i]

IE Area	Sample Indicators and Documentation	Sample Evidence
Access and Equity Attention to compositional numbers and status, reduction of barriers to participation, and success levels of faculty, staff, and students	• Compositional diversity that aims to bring multiple voices into the conversation, including voices historically excluded	• Ability to work with diverse students included in requests for new positions and in hiring criteria
	• 3- and 5-year turnover rates among faculty and staff are low and/or dropping	• Falling turnover rates
	• Policies (e.g., bylaws) evaluated by outside consultant for effects on retention and success of a diverse workforce and student body (e.g., definition of scholarship is road enough to include research of interest to wide range of professionals; teaching evidence definitions are clear and fair, standards are not arbitrary)	• Chair participation in training on spousal hiring, FMLA, ADA protocols, interpersonal interaction, etc. • Followed bylaws checklist
	• Courses, classrooms, and offices are as accessible as possible to all persons	• Reviewed by department chairs, or committees, reported to ADA coordinator
	• All syllabi, course materials (including films), and events ads include accessibility statement and list a contact person for inquires	• Reviewed by department chair and/or ADAs; printing services

	• Equity gaps identified, then closed; e.g.:
	    o no systematic patterns in student grades, or in student access to and participation in beneficial learning experiences or events
	
	    o salaries, tenure, rates of promotion/career progression are equitable compared to Delaware, CUPA, or UW System data
	    o LTE positions used appropriately (e.g., not for permanent positions)
		• Measures collected through IR (e.g., DWFs, grades in key courses, GPAs, graduation rates, retention rates within the major) and action plans generated
		 • 80% of dept staff have taken online training on equity gaps
		 • Inequities noted to dean or other appropriate administrator
		 • Dean or other administrator notified

IE Area	Sample Indicators and Documentation	Sample Evidence

Diversity in the Formal and Informal Curriculum Inclusion of diversity content in courses, programs, and experiences across the various academic programs and in the social dimensions of the campus environment	• Identify diversity-related knowledge, attitudes, and skills necessary for graduates of programs or to be acquired by event participants
	
	  o or staff in service units;
	  o construct plans to ensure and measure acquisition thereof
		• Student Learning Outcomes defined by department or unit and tracked through programs
		• Added to job descriptions for new positions;
		• Added to annual review and program assessment; classroom climate item added to SEIs

	• Courses and experiences related to diversity topics included and/or required in the curriculum	• Student Learning Outcomes defined by department and tracked through programs
	• Programming addresses a broad range of diversity issues and groups	• Added to program assessment
	• Programming explores how a wide range of populations relate to an issue or topic (e.g. what does "sustainability" mean for the inner city poor?)	• Added to program assessment
	• Support for and valuing of research around diversity issues and groups, including issues related to teaching and learning in a discipline, by members of the unit	• Included in bylaw's definition of scholarship
	• Active commitment to develop all members' diversity-related bases of knowledge and practice	• Added to annual review • 80% of dept members have completed 2 Equity Mindedness or Cultural Competency modules or attended 2 or more Inclusive Fridays each year

IE Area	Sample Indicators and Documentation	Sample Evidence
Campus Climate: The development of a psychological and behavioral climate supportive of all students , staff, and faculty	• Students, faculty, and staff understand what constitutes harassment based on race, ethnicity, gender, and sexual orientation, know what to do when they encounter it, and understand the consequences of engaging in it as well as the impact it can have	• All supervisors annually take online sexual harassment quiz (HUB website), monitored by deans and directors • Sexual harassment quiz is admission ticket to new faculty orientation • Unit plans to include other trainings as part of faculty/staff development
	• Members seek to develop knowledge of a wide range of historically-underserved groups	• 80% of staff complete cultural competency self-studies available per year
	• Members learn what "equity mindedness" means and how to implement it daily	• Participation in relevant professional development added to annual review
	• Promotion of cross-group conversation, collaboration, problem-solving, planning	• Committees commit to broad representation (e.g. race, gender, sexual orientation, disability, university employment status) • Collaborative course assignments intentionally develop cross-group interaction
	• All members of the department and all students in all courses understand the hallmarks (ground rules) of civility, know how to respond to incivility, and know how and why to uphold these standards of behavior	• Departments and units adopt a statement on civility, include it in bylaws, and incorporate it into syllabi and policies
	• Aim to be a "safe space" where students, staff, and faculty feel no need to pass as a member of a dominant group in order to feel connected	• 80% of staff participate in cultural competency and/or LGBT Safe Space training

IE Area	Sample Indicators and Documentation	Sample Evidence
Student Learning and Development The acquisition of content knowledge about diverse groups and cultures and the development of cognitive complexity	• Goals and measures for acquisition of knowledge about diverse groups and cultures necessary for creating interaction across groups	• Learning outcomes identified and assessed
	• Creation of intentionally diverse and collaborative learning environments	• Collaborative course assignments intentionally develop cross-group interaction
	• Development of unit members' skills in designing and leading activities and experiences requiring interaction across groups	• Participation in appropriate CATL workshops
	• Monitoring cognitive and social development in diverse learning environments	• Learning outcomes identified and assessed
	• Monitoring sense of ethnic, racial, and cultural identity for all students	• Students can see themselves reflected in curricula; opportunities exist for staff and students to develop positive non-dominant group identity (e.g., students encouraged to participate in orgs that represent diversity; student participation in High-Impact Practices is equitable across groups; community placement sites vetted for inclusivity)

[i] **adapted from Damon A. Williams, et als, Toward a Model of Inclusive Excellence and Change in Postsecondary Institutions** (pdf) (Washington, DC: AAC&U, 2005).