March 24th, 2020

Office of Equity and Inclusion

Equity-Minded Strategic Planning

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Agenda

- Key Definitions

- Strategic Planning

  - Elements of a strong plan

  - Equity-minded focus

  - Keys for Success

- Strategic Diversity Leadership

- Office of Equity & Inclusion Strategic Plan Overview

  - Theory of Change

- Strategic Planning Process / Toolkit

Key Definitions

- **Diversity** encompasses acceptance and respect. It is understanding that each individual is unique, and our individual differences need to be recognized. These can be along the dimensions of race, ethnicity, gender identity, gender expression, sexual orientation, socio-economic status, age, physical/mental ability, religious beliefs, political beliefs, or other ideologies.

- **Inclusion** promotes broad engagement, shared participation and advances authentic sense of belonging through safe, positive, and nurturing environments. It is about understanding each other and moving beyond simple tolerance to accepting and celebrating the rich dimensions of diversity contained within each individual. Inclusion is key to eliminating systemic inequality.

- **Equity** is the proportional distribution of desirable outcomes across groups. Sometimes confused with equality, equity refers to outcomes while equality connotes equal treatment. Where individuals or groups are dissimilarly situated, equal treatment may be insufficient for, or even detrimental to, equitable outcomes.

  More directly, equity is when an individual's race, gender, socio-economic status, sexual orientation, etc. do not determine their educational, economic, social, or political opportunities.

Before we begin…

- **Does your institution or division have a strategic plan?**

- **What are one or two things that you would like to see your organization accomplish by having an equity-minded plan?**

Institutional Commitment

*"I think diversity plans are incredibly important. Whether you make diversity a focus of your academic plan or do a stand-alone plan, the issue is to get something done. You've got to approach implementation in a way that has **accountability, resources, presidential involvement, and coordination** or the plan is dead on arrival. We have seen lots of plans throughout the years; **the challenge is to implement in a meaningful way [things] that can truly lead to change.**"*

Professor of Psychology and Associate Vice Provost at a public university on the West Coast

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Strategic Planning – What is it?

Strategy

Strategic Planning is a deliberate process of determining how (the **ways**) to use capabilities (the **means**) in time and space to achieve objectives (the **ends**), while considering the associated risks.

Ends + **Ways** + **Means** = **Strategy**
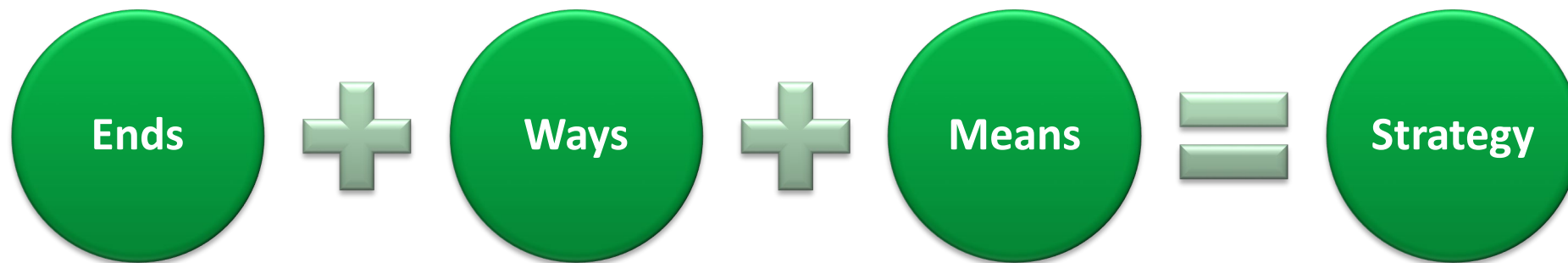
Basic Elements of a Strategic Plan

- **Vision or Mission Statement**
- **Values**
- **Goals / Outcomes**
  - Short-term
  - Intermediate-term
  - Long-term
- **Action Plan**
- **Accountability**

What makes it Equity-Minded?

Equity-Mindedness

- Race conscious; institutionally focused; evidence based; systematically aware; and action oriented (Bensimone and Malcom, 2012)

- Social and historical contexts

- Needs assessment

- Accountability for gaps in outcomes

- Broad engagement and stakeholder involvement

The Center for Urban Education created the concept of "equity-mindedness" to describe actions that demonstrate individuals' capacity to recognize and address racialized structures, policies, and practices that produce and sustain racial inequities. (Bensimon & Malcom, 2012; Dowd & Bensimon, 2015).

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Equity-Minded Strategic Planning

What are the outcomes?

- Drives institutional transformation

- Embeds the principals of excellence, equity, and inclusion

- Highlights the importance of diversity to institutional mission

- Communicates commitment to diversity impact

- Institutionalizes programing & initiatives

- Provides systems of accountability

- Provides clarity in targeted outcomes and institutional practices

- Holistic understanding of inequities for targeted action
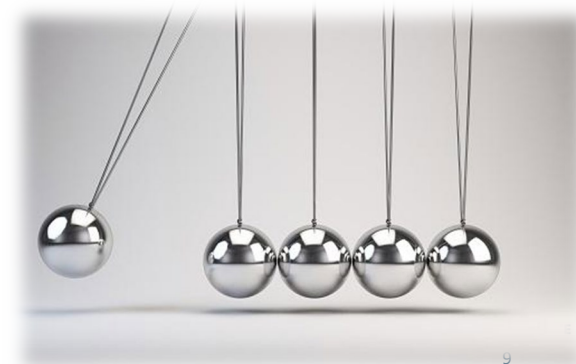
Where plans often fail…

- **The process requires ongoing commitment**
    - Lack of Leadership or buy-in
- **Wrong measures or unrealistic objectives**
- **Change-resistant Culture**
- **Poor Communication**
- **Lack of Accountability**
- **Change Saturation**
- **Inflexible**

"As particular changes are introduced into the environment, their ripple effects create new, unanticipated issues and opportunities. These in turn lead to other adjustments in project direction, assumptions, systems, practices, and so on."

- Loden, 1996

Keys for Success

- **Understand the Environment**
- **Leadership Commitment**
- **Collaboration and Stakeholder Involvement**
  - Use an equity lens
- **Assessments are built-in**
- **Goals are specific and measurable**
- **Plan is Manageable**
- **Open Communication**
- **Adaptive and Iterative**

Strategic Planning is Challenging Work as is Equity-Minded Strategic Planning!

Strategic Diversity Leadership

PRINCIPLE 1

Redefine issues of diversity, equity, and inclusion as fundamental to the organizational bottom line of mission fulfillment and institutional excellence.

PRINCIPLE 2

Focus on creating systems that enable all students, faculty, and staff to thrive and achieve their maximum potential.

PRINCIPLE 3

Achieve a more robust and integrated diversity approach that builds on prior diversity models and operates in a strategic, evidence-based, and data-driven manner, where accountability is paramount.

PRINCIPLE 4

Focus diversity-related efforts to intentionally transform the institutional culture, not just to make tactical moves that lead to poorly integrated efforts and symbolic implementation alone.

PRINCIPLE 5

Lead with a high degree of cultural intelligence and awareness of different identities and their significance in higher education.

Office of Equity & Inclusion Strategic Plan

Where to begin…..
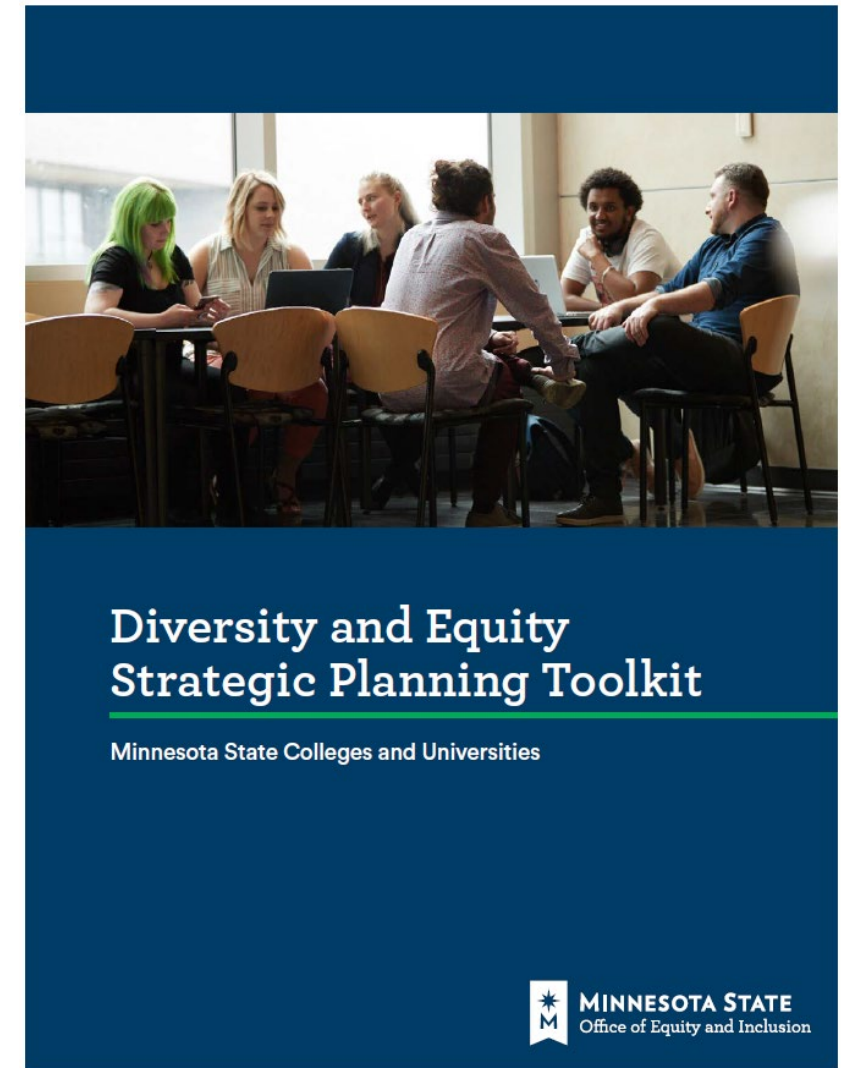
Background

Office of Equity and Inclusion Mission:

The Minnesota State Office of Equity and Inclusion (OEI) ensures students, faculty, and staff across Minnesota State learn and work in environments that actively promote equity and inclusion. The values that guide this work include access and opportunity, equity and inclusion, cultural competency, culturally responsive pedagogy and service, and community engagement.

OEI's Long-term Goals & Strategic Priority Areas

Long-term Goals

- Educational equity gaps (as measured by student persistence, completion, and graduation) are eliminated at all colleges and universities of Minnesota State; and

- Minnesota State workforce diversity is strengthened through equity in recruitment, hiring, and retention.

Strategic Priority Areas

Diversity, Equity, & Inclusion Expertise and Strategy

Equity in Academic Outcomes

Civil Rights Compliance

Campus Climate

Office of Equity & Inclusion
Theory of Change

Minnesota State

Diversity, Equity, & Inclusion Expertise and Strategy

» Advance strategy and provide consultation to Minnesota State colleges and universities to advance equity.

» Support the development of diversity education and cultural competency professional development for Minnesota State stakeholders.

Campus Climate

» Support the work of Minnesota State colleges and universities to ensure welcoming and inclusive campus environments across the colleges and universities of Minnesota State.

Equity in Academic Outcomes

» Achieve equity in student success academic outcomes across the colleges and universities of Minnesota State to support Equity 2030.

» Improve assessment of equity and inclusion efforts at colleges, universities, and Minnesota State.

Civil Rights Compliance

» Improve support and capacity for compliance with state and federal civil rights laws.

» Ensure civil rights compliance at colleges and universities receiving federal funding (i.e., Perkins Grant funding).

EQUITY BY DESIGN

Ensuring equitable and inclusive learning and work environments for students, faculty, and staff

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System Office Equity Strategy

Develop, review, and shape policies with an equity lens.	Guide, influence, and monitor Minnesota State equity strategies.	Ensure compliance with civil rights policies, regulations, and laws across the colleges and universities..	Consult with Minnesota State divisions to inform their equity strategy.	Partner with Academic and Student Affairs to impact equitable academic outcomes.	Promote statewide community engagement and advocacy.	Collaborate with Human Resources to address workforce diversity and talent development.

Colleges & Universities Equity Areas of Focus

Apply an Equity Lens to Policy Review	Identify and support the role of CDOs to shape campus strategy for Equity and Inclusion.	Partner with the Academic and Student Affairs Division to address disparities and ensure equity in academic outcomes.	Conduct campus climate assessment.	Support the recruitment, hiring, and retention of a diverse workforce.	Establish partnership with CDOs and finance/facilities divisions to provide equity in budgeting and facilities management.	Establish community partnerships that are culturally responsive to students and the workforce.

Reflection Question….

Those of you who have began this process, what does it look like on your campus?

- What were some early successes?

- Who is leading the planning team? Who is part of the planning team?

- Where are you at?

Strategic Planning Process

TOOLKIT PHASES

- Convening the Planning Team
- Conducting an Institutional Needs Assessment and Research
- Analyzing Data
- Drafting the Plan: Setting Goals, Strategies, and Outcomes
- Implementing a Communication Plan
- Sustaining the Process

"A Way"

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Convening the RIGHT team

- **Inclusive and Interdisciplinary Representation**
- **Commitment**
- **Leadership or Designated Official**

Administrators
Faculty
Staff
Students
Community Stakeholders
Subject-matter Experts

Diversity Planning Team
Recommended 10–16 members

Advisor to
the planning

Research and Needs Assessment

- **Gather data and information about the current state of affairs.**
- **Identify areas for improvement, areas of strength, and future steps.**
- **Foundation for moving towards a meaningful and impactful plan.**

Additional Data Sources

- Annual Equity & Inclusion Assessment
- MinnState Accountability Dashboard
- Affirmative Action Plan
- CCSSE and NSSE surveys
- Campus Climate Surveys
- Equity by Design Metrics
- External Data (labor statistics, graduation rates for diverse students at peer institutions, etc.)

Williams (2013) states that in order for an institution to delve into where it wants to go, first it must take into account where it is on its diversity journey.

Data Analysis and Assessment

Data-Informed Decision Making

- Partner with Institutional Research
- Identify what questions you want to answer
- Analyze themes and trends in your data and evaluate their impact on your goals

Strengths and Improvements

- What are your organization's strength areas? Where is inclusiveness being practiced?
- In which areas does your organization need to improve? (Areas where inclusiveness needs to be embedded?)

Alignment to Strategic Priority Areas

Data Analysis Best Practices

1. **Establish a research team** to evaluate existing diversity policies and programs.
2. **Define diversity efforts** that include both curricular and non-curricular programs.
3. **Collect diversity data** on campus.
4. **Organize and analyze** the diversity data.
5. **Develop a visual map** with data analysis findings.

Establish the Team → Define Diversity Efforts → Collect Diversity Data → Organize and Analyze → Develop a Visual Map
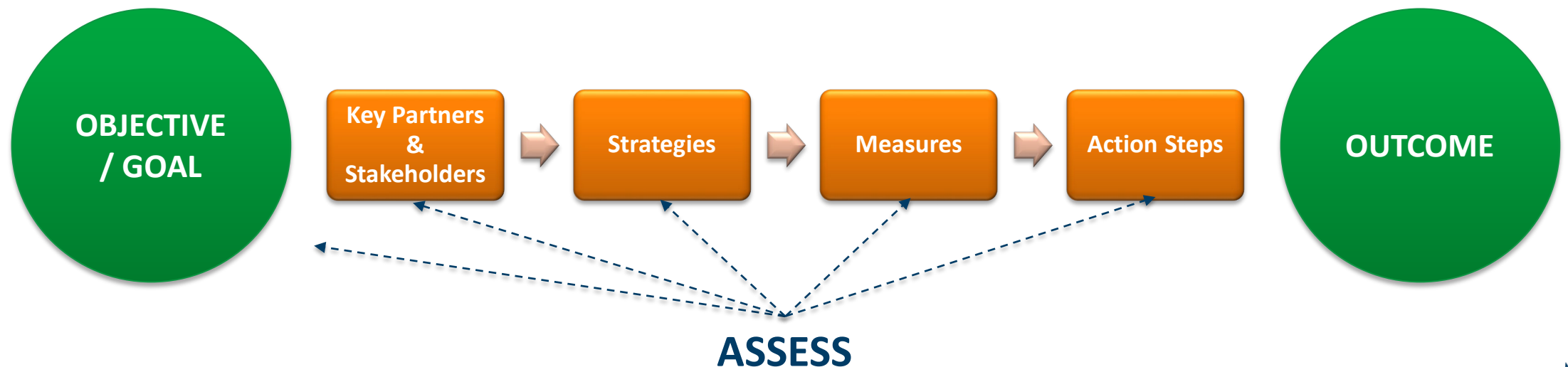
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Frame Your Challenge

What is the problem you are trying to solve or what are you trying to sustain?

1) Draft the Challenge

2) Consider Contexts

3) Scope of the Issue

4) Repeat

Drafting the Plan

Setting Goals, Strategies, and Outcomes

- **Goals are broad outcomes expressed in general terms**

- **Strategies are the methods for achieving a goal**

- **Outcomes are the changes you expect to happen**

    - Short Term

    - Medium or Intermediate Term

    - Long Term

OBJECTIVE / GOAL → Key Partners & Stakeholders → Strategies → Measures → Action Steps → OUTCOME

ASSESS

Defining Success

Moving Ideas to Outcomes

- **What does success look like?**

- **Establish Milestones**

- **Consider Multiple Time Horizons**

- **What does success look like from different lenses?**

    - Your organization versus target population

- **External Measures of Success**

Elements of the Equity-Minded Strategic Plan

STRATEGIC PLAN

- Vision & Mission
- Diversity Philosophy Statement
- Rationale for Diversity Planning / Implementation
- Objectives / Goals
- Outcomes & Measures
- Budget
- Key Terms & Definitions

Communication Plan

- **Helps the committee define the approach**

- **Increases engagement during every phase**

- **Infused throughout the process**

- **Strategic alignment and messaging**

State Objective

Target Audience

Develop Key Information

Delivery Method

Feedback Process

Communication Timeline

Budget

Implementation

Review Feedback

Sustain the Process

- **Continue to build capacity**

  - Current capacity and future capacity

- **Develop leaders and increase shared understanding**

  - Highlight and build off what is already happening

  - Provide training and support

- **Assessments**

- **Mechanisms of accountability**

" If institutions implement a strong accountability system, diversity leadership can assume a valued position in ways that are similar to financial stewardship, research productivity, and other tangible examples of leadership."

- Williams (2013, 293)

Sustain the Process - Assessments

Monitor and Evaluate

- Bring in Key Partners and Stakeholders
- Assess your team's capacity – do you need to outsource evaluation?
- Balance qualitative and quantitative assessments
- Tie to Systems of Accountability

Resources

Minnesota State Office of Equity & Inclusion Strategic Plan: 2020-2023

Minnesota State Diversity and Equity Strategic Planning Toolkit

Williams, D. 2013. *Strategic Diversity Leadership: Activating change and transformation in higher education.* Sterling, VA: Stylus Publishing, LLC.

Williams, D. A., and Clowney, C. 2007. *"Strategic planning for diversity and organizational change: A primer for higher education leadership."* Effective Practices for Academic Leaders, 2(3): 1–16.

E.M. Bensimon & L.E. Malcom (Eds.) *Confronting Equity Issues on Campus: Implementing the Equity Scorecard in Theory and in Practice*. Sterling, VA: Stylus Publishing.

Loden, M. 1996. *Implementing Diversity.* Chicago, Illinois: Irwin Professional.

Upcoming Training

Inclusive Leadership Priorities for COVID-19

March 26, 2020 from 8:30am – 10:00am via Zoom

Open to all Minnesota State Employees

Register on ELM – Class Code: E260000CLR0020

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Office of Equity and Inclusion

The landscape of higher education has fundamentally shifted. Campuses across the country are closing and/or transitioning to operating fully online as a response to slow the spread of the Corona Virus (COVID-19). Institutions are working to address rapidly changing environments all the while working to meet the needs of the most fragile populations including underserved and underrepresented students.

We encourage you to join the Office of Equity and Inclusion for a 3-part webinar series designed to provide resources and equity-minded practices that will assist campuses in navigating this unchartered territory.

Part 1 - Focus Areas:
Inclusive Leadership Practices
Assessing gap and needs
Organizational response messaging
Virtual Campus Climate

Upcoming Dates (Times TBD):
Part 2: April 7, 2020 at 1:00pm - 2:30pm   Class Code: E260000CLR0021
Academic Inclusion Priorities to Respond to COVID-19

Part 3: April 14, 2020 at 9:00am – 10:30am   Class Code: E260000CLR0022
Guiding Campus Response to Address Racism and Xenophobia

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Questions

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