

2023 – 2026

Inclusive Excellence Framework

"Moving Forward Together in Excellence"



WILLIAM & MARY

CHARTERED 1693

Inclusive Excellence Framework

A Plan for Tracking and Assessing Progress on DEI Strategic Priorities

2023 – 2026

Decades of research have shown that diverse and inclusive classrooms, workplaces and research environments are essential for excellence in higher education. Full participation of all employees and students from diverse backgrounds are important contributors to organizational success in every register by which we define success at William & Mary.

To prepare ourselves and our graduates for a globally competitive workplace and networked world, we must be effective in improving DEI in the key registers outlined in this plan. Deep and sustained efforts to recover the stories and voices that have been erased during that history are part of our identity as an institution of learning and knowledge. We aim to lead in inclusive teaching, inclusive research, social mobility and access. We aim to work and live in ways that enhance the wellbeing and full participation of all. Finally, for more than a decade, William & Mary has been a leader in addressing our legacy as a colonial university. Our response to this legacy is to innovate to advance what we value most.

Land Acknowledgement

William & Mary acknowledges the Indigenous peoples who are the original inhabitants of the lands our campus is on today - the Cheroenhaka (Nottoway), Chickahominy, Eastern Chickahominy, Mattaponi, Monacan, Nansemond, Nottoway, Pamunkey, Patawomeck, Upper Mattaponi, and Rappahannock tribes - and pay our respect to their tribal members past and present.

Statement on Slavery and its Legacies

The Board of Visitors acknowledges that William & Mary enslaved people, exploited them and their labor, and perpetuated the legacies of racial discrimination. The Board profoundly regrets these activities, apologizes for them, expresses its deep appreciation for the contributions made by the African and African American members of its community to the vitality of William & Mary then, now, and for all time coming, and commits to continue our efforts to remedy the lingering effects of past injustices.

Vision, Mission, Values

Vision

William & Mary transcends the boundaries between research and teaching, teaching and learning, learning and living. People come to William & Mary wanting to understand and change the world – and together we do.

Mission

A preeminent, public research university, grounded in the liberal arts and sciences since 1693, William & Mary is a vibrant and inclusive community. Through close mentoring and collaboration, we inspire lifelong learning, generate new knowledge, and expand understanding. We cultivate creative thinkers, principled leaders, and compassionate global citizens equipped for lives of meaning and distinction. William & Mary convenes great minds and hearts to meet the most pressing needs of our time.

Statement of Values

Accomplishing our mission requires that the entire community work together as stewards of the core values that infuse our collective effort:

Belonging. We create a welcoming and caring community that embraces diverse people and perspectives.

Curiosity. We foster an open academic environment that champions intellectual agility and inspires creativity in the discovery, preservation, application, and advancement of knowledge.

Excellence. We aim for the extraordinary, recognizing that personal growth and meaningful accomplishment require bold and innovative aspirations, courageous risk-taking, and focused effort.

Flourishing. We create conditions that ensure William & Mary will thrive for all time coming, and we empower those who live, learn, and work here to make choices toward a healthy and fulfilling life.

Integrity. We are honorable, equitable, trustworthy, and committed to the highest ethical standards in all that we do.

Respect. We treat one another with mutual respect, recognizing and upholding each person's inherent dignity and worth. We engage with individuals and communities both near and far, devoting our knowledge, skills, and time to serving the greater good.

William & Mary is a community that fosters deep human connection. We reflect on the lessons of history to meet the challenges of a rapidly changing world. We engage diverse perspectives and seek wisdom in bridging differences. Together, we are unceasing in our efforts to make a meaningful difference in our communities, the state, the nation, and the world.

The Inclusive Excellence Framework at William & Mary

William & Mary follows the *Inclusive Excellence* framework outlined by the Association of American Colleges & Universities (AAC&U). To borrow their definition (with light adjustments), Inclusive Excellence is a framework designed to help organizations integrate diversity and quality efforts. As a model, Inclusive Excellence incorporates diversity efforts into the core of organizational functioning.

Applying Inclusive Excellence concepts infuses diversity into an organization's recruiting and hiring processes; into its training; and into its administrative structures and practices. Inclusive Excellence means an organization has adopted mechanisms for the cohesive, coherent, and collaborative integration of diversity, inclusion and equity into its definitions of mission success. William & Mary, like the AAC&U, views DEI as "catalysts for organizational excellence ... and not as isolated initiatives." They are essential to and distributed throughout our operations.

In addition, William & Mary has for nearly two decades engaged in historical justice and reconciliation efforts. The university's groundbreaking Lemon Project, among other initiatives, has steadily uncovered hidden stories of enslaved women, men and children who built, worked and lived in the Williamsburg campus. For that reason, the university organizes its DEI strategy under a sixth heading, "Innovation, Community Engagement and Reconciliation."

Definitions

The Inclusive Excellence framework provides specific definitions for the terms diversity, equity, and inclusion. Throughout this document, we use them as follows:

Diversity The term diversity is used to describe the various mix or combinations of human differences (e.g., personality, learning styles and life experiences) and group/social differences (e.g., race/ethnicity, class, gender/ gender identity, sexual orientation, country of origin and ability as well as cultural, political, religious or other affiliations) that can be engaged in the service of learning and working together.

Equity The creation of opportunities for historically underrepresented populations to have equal access and equitable opportunity to and participate in educational programs designed to reduce the academic/opportunity gap in student success and completion. Equity is also the process of allocating resources, programs and opportunities to staff, faculty and students without historical discrimination and addressing imbalances.

Inclusion The term inclusion is used to describe the active, intentional and ongoing engagement with diversity – in people, in the curriculum, in the co-curriculum and in communities (intellectual, social, cultural, geographical) with which individuals might connect – in ways that increase one's awareness, content knowledge, cognitive sophistication and emphatic understanding of the complex ways individuals interact with and within systems and institutions.

1: Access and Success

Goal:

Increase the diversity of W&M's undergraduate, graduate/professional student body, faculty and staff to deepen our skills and talents.

OBJECTIVE 1

Achieve increased undergraduate student enrollment from historically underrepresented and underserved populations

Strategies

1. Implement new gateway initiatives to make W&M a preferred destination for underserved populations
2. Make application process more inclusive and equitable
3. Increase scholarship support for undergraduate students to promote affordability
4. Increase yield for admitted first-generation, low-income veterans and transfer students
5. Enable new points of entry to a W&M education to achieve "smart growth" for all cohorts

Metrics and Indicators

(disaggregate by demographics where possible)

1. Number of gateway program participants enrolling
2. Yield rate for admitted first-time-college and transfer students
3. Undergraduate enrollment

OBJECTIVE 2

Increase retention and academic success of historically underrepresented and underserved undergraduate students

Strategies

1. Identify specific barriers to the academic progress and success of underrepresented and underserved undergraduates
2. Provide a funded internship or other applied learning experience for every student
3. Expand career pathway initiatives, engaging alumni at all career stages
4. Continue to seek external funding to support the W&M Scholars Undergraduate Research Experience program and the FGLI Program to increase the number of participants

Metrics and Indicators

(disaggregate by demographics where possible)

1. Participation rates in academic support programs
2. First to second year retention rates
3. Second to third year retention rates
4. Four- and six-year graduation rates
5. Results of program evaluation/assessments

OBJECTIVE 3

Increase the recruitment and retention of diverse graduate and professional students

Strategies

1. Join local, state and national organizations that provide access to potential diverse graduate and professional students
2. Grow new online, continuing and executive education programs to reach professional and lifelong learners
3. Design new postdoctoral programs to encourage underrepresented and underserved undergraduates to attend graduate/professional programs
4. Connect graduate and professional students with programs that provide faculty and alumni mentors

Metrics and Indicators

(disaggregate by demographics where possible)

1. Enrollment in graduate and professional programs
2. Degrees awarded
3. Placement rates in postdoctoral, faculty and non-academic positions

OBJECTIVE 4

Recruit and retain a diverse faculty and staff

Strategies

1. Complete and assess 3-year Faculty Hiring Plan to recruit and retain excellent faculty with a 100% commitment to inclusive teaching with ongoing adjustments based on feedback from faculty closest to the process (on-going)
2. Develop a comprehensive recruitment and retention plan for all levels of staff
3. Use exit interviews and climate surveys to improve workplace experience
4. Utilize peer coaching for managers/leaders who are working on developing and leading diverse teams
5. Develop a robust New Employee Orientation program to include the DIB Training module for all new employees to ensure a seamless onboarding process for new hires
6. Increase the referral rate for open positions
7. Develop and evaluate strategies to recruit and retain individuals with disabilities
8. Ensure that accommodations for students, employees and the public are accessible and signage is visible
9. Develop and evaluate strategies to recruit and retain more veterans

Metrics and Indicators

(disaggregated by demographics where possible)

1. Faculty and staff count and percentages
2. Review of 3-year faculty hiring proposal
3. Managerial and executive staff counts and percentages
4. Retention rates for faculty and staff
5. Tenure and promotion rates
6. Leadership development participation for faculty and staff

2: Campus Climate

Goal:

Create and sustain an organizational environment that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations.

OBJECTIVE 1

Create a climate that is supportive and respectful while valuing myriad perspectives and experiences and aligned with the university's mission, vision and values

Strategies

1. Ongoing campus landscape review to eliminate structures that may be perceived as barriers to a welcoming and inclusive environment
2. Create more equitable and inclusive learning environments and work spaces
3. Create a community where uncomfortable meaningful dialogue is valued and practiced
4. Educate the university community on the prevention of harassment, discrimination and identity-based violence as well as related equity policies. Promote productive ways to resolve conflict. Effectively address concerns and complaints
5. Distinguish W&M Athletics in ways that are equitable, more financially sustainable, and that enhance the sense of belonging for all by uniting the campus during games and events
6. Offer educational and celebratory events for students, faculty and staff, and the community that recognize, and honor diversity and promote inclusion from disparate viewpoints
7. Evaluate university programs for their impact on climate for inclusion
8. Establish strategy for addressing hostility and bullying in the workplace
9. Create opportunities to further university-wide inclusion initiatives by using the power of W&M Athletics competitions to recognize, honor, and celebrate different underrepresented and community groups
10. Introduce new students to W&M's values and responsibilities that encourages critical thinking and self-reflection
11. Support the health and wellbeing of our campus community, and promote professional growth for staff and faculty

Metrics and Indicators

(disaggregate by demographics where possible)

1. Perceptions of climate for diversity and inclusion as measured by a climate survey and other sources of information
2. Awareness and understanding of campus resources related to harassment, discrimination and identity-based violence as measured by climate surveys and evaluations. Results from number of reports and actions taken (2015, 2017, 2018, 2019)
3. Results of program evaluations designed to facilitate intergroup dialogue and trust
4. Triangulation of institutional results with national benchmarking

3: Education & Scholarship

Goal:

Engage students, faculty, staff, alumni and the community in learning varied perspectives of domestic and international academic engagement.

OBJECTIVE 1

Offer courses, curricula, events and learning opportunities at the undergraduate, graduate and professional levels that achieve DEI learning goals

Strategies

1. Mobilize W&M's world-wide network of university partnerships and broaden learning experiences for current and prospective students
2. Expand COLL 350 general education requirement offerings
3. Rekindle and model civil discourse, convening disparate views to advance democratic values
4. Develop opportunities that help faculty, staff and instructional graduate students assess the achievement of DEI learning outcomes in class or co-curricular activities
5. Hire faculty with expertise with inclusive teaching
6. Build opportunities for students to learn about multiple identities and cultures
7. Strengthen W&M's research ecosystem to spark new discovery
8. Provide multifaceted opportunities for faculty, staff and students on topics around democracy

Metrics and Indicators

(disaggregate by demographics where possible)

1. Participation by faculty, students and staff in professional development programs related to curricular transformation, discovery, and belonging
2. Participation by students in co-curricular opportunities tied to Inclusive Excellence

3. Research output related to topics of democracy, data and careers
4. Evaluation of programs related to inclusive teaching
5. Student participation in co-curricular opportunities related to DEI
6. Self-reported improvement in knowledge and skill related to inclusive teaching and curiosity

OBJECTIVE 2

Increase the cultural competencies of faculty and staff

Strategies

1. Develop student-created accessibility tutorials for tools commonly recommended
2. Launch Inclusive Teaching Course with optional in-person sessions
3. Expand the expertise and awareness of faculty and staff of the needs of diverse students (i.e. neurodiversity)
4. Assist faculty and instructional graduate students in assessing diversity related learning goals for accessibility

Metrics and Indicators

(disaggregate by demographics where possible)

1. Participation in professional development opportunities
2. Self-reported growth in awareness and competencies
3. Faculty and instructional graduate students assessing diversity related learning goals through individual contributions
4. Inclusive teaching practices are embedded in STLI training materials and experiences for faculty

4: Organizational Culture and Accountability

Goal:

Create and sustain an institutional infrastructure that effectively supports progress in achieving organizational excellence goals in the university strategic plan.

OBJECTIVE 1

Develop a robust and durable infrastructure to address long-standing institutional challenges and sustain the journey toward Inclusive Excellence

Strategies

1. Incorporate Inclusive Excellence in all strategic planning efforts
2. Continue to offer staff pairing networking opportunities
3. Cultivate a culture of accountability for inclusive learning that aligns with W&M's mission, vision, and values
4. Complete cyclical comprehensive staff salary studies and benchmark progress
5. Activate the Climate Action Roadmap and Campus Master Plan to achieve W&M's sustainability goals
6. Attract and maintain outstanding employees and students to further our mission
7. Modernize our campus-dining, dorms, classrooms and other learning and work spaces -so that students, faculty and staff thrive
8. Conduct annual training for senior leadership in alignment with values
9. Incentivize collaboration across units for whole-institution priorities
10. Continue to identify the areas within our facilities that are not ADA compliant and brainstorm ideas to create more inclusive spaces

Metrics and Indicators

(disaggregate by demographics where possible)

1. Documented processes for reporting progress towards the DEI goals established in the Inclusive Excellence framework
2. Evidence of DEI integration in the university-wide and unit-level strategic plans
3. Continue to check in annually with Chief Facilities Officer regarding ADA compliance, signage, and inclusive spaces in existing facilities
4. Report on where the use of shared resources and dispersion of best practices have been implemented
5. Number of formal cross-campus collaborations

OBJECTIVE 2

Create a culture of evaluation and continuous improvement for administrators and senior leaders

Strategies

1. DEI goal attainment is part of all senior leadership assessments
2. Engage senior leaders and stakeholders in analyzing disaggregated data and special studies to better understand and address long-standing challenges for underrepresented/underserved students, faculty and staff
3. Establish systems of reporting and accountability
4. Set expectations for campus leaders that metrics related to diversity, equity and inclusion are vital measure of institutional excellence
5. Evaluate internal policies, processes and practices in alignment with the W&M Affirmative Action plan

Metrics and Indicators*(disaggregate by demographics where possible)*

1. Annual reports from school and administrative units to Chief Diversity Officer demonstrating progress towards DEI goals outlined in the unit plan
2. Work groups dedicated to analyzing disaggregated data related to DEI
3. Number of policies and processes evaluated and redesigned using an equity lens

OBJECTIVE 3

Sustain and increase university-wide efforts designed to amplify to potential secure gifts, grants and opportunities to advance the goals in the Inclusive Excellence framework and Vision 2026

Strategies

1. Create a financial model that ensures an exceptional W&M experience for all

Metrics and Indicators*(disaggregate by demographics where possible)*

2. Funding support for inclusion initiatives from private fundraising efforts
3. Increased initiatives aimed at women and cultural alumni cultivation
4. Annual reports on the satisfaction or the engagement of alumni who represent diverse perspectives

OBJECTIVE 4

Meet/exceed 42% use of Small, Women- & Minority-owned (SWaM) businesses (plus micro and Service-Disabled Veteran businesses)

Strategies

1. Provide spend overview to cabinet members for evaluation and accountability
2. Additional visibility of W&M SWaM vendors for all departments
3. Continuation of W&M Supplier Diversity Expo
4. Continuation of training opportunities for campus

Metrics and Indicators*(disaggregate by demographics where possible)*

1. Results of review of comprehensive dashboard
2. Dollars spent on SWaM annually
3. Impact of education and awareness on community outcomes (i.e., Vendor Fairs, Commonwealth Database, Incentives)
4. Monitor SWaM efforts through quantitative and qualitative metrics
5. Measure progress in diversifying the SWaM vendor pool in terms of gender, race, nationality, veteran status, etc.
6. Assess progress toward annual goals by senior leaders

5: Innovation, Community and Reconciliation

Goal:

Create and sustain an institutional infrastructure that effectively supports progress in achieving diversity, equity and inclusion goals in the university strategic plan.

OBJECTIVE 1

Evaluate and expand community engagement and partnerships to create collective impact with other community organizations

Strategies

1. Assess existing engagement and partnerships to determine how best to use the university's resources to bring about the conditions of collective impact
2. Partner with local community organizations and area HBCUs and Tribal leaders
3. Expand Community Engagement programming using new platforms

Metrics and Indicators

(disaggregate by demographics where possible)

1. Results of assessment
2. Number of partnerships
3. Number of students participating
4. Impact of partnerships on community outcomes

OBJECTIVE 2

Evaluate and increase philanthropy in support of Inclusive Excellence

Strategies

1. Conduct a review of existing philanthropic efforts and make adjustments to further Inclusive Excellence goals in the community
2. Identify new and pursue Inclusive Excellence funding priorities for University Advancement and all units
3. Prepare for future campaigns by identifying high impact area of focus
4. Expand on William & Mary's track record of success in securing funding from corporate and foundation funders whose philanthropy focuses on advancing Inclusive Excellence
5. Continue to train Advancement staff on best practices in inclusive fundraising, and expand this training to academic leadership with fundraising responsibilities
6. Continue to provide education for fundraisers and University Advancement staff about current Inclusion initiatives across campus to facilitate donor conversation

Metrics and Indicators*(disaggregate by demographics where possible)*

1. Results of review
2. Actual dollars spent on DEI-related philanthropy
3. Impact of philanthropy on community outcomes
4. Monitor success of fundraising through quantitative and qualitative metrics
5. Measure progress in diversifying the donor pool in terms of gender, race, nationality, veteran status, etc.
6. Assess engagement of faculty, students and academic leaders with Inclusive Excellence fundraising

Metrics and Indicators*(disaggregate by demographics where possible)*

1. Research goals met (highlighting those established by descendants)
2. Number of visitors to partnership research sites: Highland, Bray, First Baptist Church, Brafferton, etc.
3. Press coverage and media for new discoveries, new partnerships
4. Elevate underrepresented and hidden histories in formal occasions: centenaries, annual ceremonies

OBJECTIVE 3

Advance the history of human beings enslaved and exploited on W&M's campus and in our region

Strategies

1. Via campus naming, renaming and contextualization improve a sense of belonging for and increase equity in what we memorialize
2. Fund the second phase of the Lemon Project to continue to uncover further history to build upon the past and related research initiatives
3. Develop and partner across the university to advance democracy initiatives
4. Work closely with Colonial Williamsburg to develop the Bray School through research and innovative programming
5. Work closely with Colonial Williamsburg and the City of Williamsburg to create destinations for African American history