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# **Academic Department Toolkit for Inclusive Excellence Unit Plan**



**WILLIAM & MARY**  
CHARTERED 1693

*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.*

Inclusive Excellence is a framework designed to integrate diversity, equity and inclusion efforts. As a model, it incorporates diversity efforts into the core of organizational functioning. Applying Inclusive Excellence concepts leads to infusing 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 means for the cohesive, coherent and collaborative integration of diversity, inclusion and equity into the organizational pursuit of excellence.

Accepting the **Inclusive Excellence model reflects the understanding that diversity, equity and inclusion (DEI) lead to organizational excellence** and are to be invited and integrated into the very core of the business enterprise and are not isolated initiatives. This framework moves DEI efforts from the margins as a moral imperative to an interwoven space where what is measured, gets done. It also creates a shared narrative across the university from academics through procurement.

### **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.

**Service.**

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.

**Diversity Statement**

William & Mary is a community that shares values of belonging, curiosity, excellence, flourishing, integrity, respect and service. We support the right to free expression of a range of ideas and work to create an educational environment that draws on diverse backgrounds and perspectives to foster mutual respect, collaboration, critical thinking and meaningful relationships. We affirm the vital role of the university in recognizing and fostering equity, inclusion and belonging related to social identities and positions that have been excluded or marginalized in our community, including differences such as ability, class, country of origin, gender identity and expression, language, race and ethnicity, religion, sexuality, and other cultural or political affiliations.

For William & Mary to fulfill its educational mission and become a place that is itself diverse, equitable and inclusive, we must acknowledge the uncomfortable truths of our history and consider the ways in which historical patterns of exploitation and exclusion may continue to shape our university.

We take seriously our obligation to speak up when we see bias, whether it be in our classrooms, workspaces or the university community at large. We embrace our shared responsibility to create change where we fall short of our goals. William & Mary strives to be a place where people of all backgrounds are able to learn and grow, and where each individual takes responsibility for upholding the dignity of all members of the community. *-February 2022*

**Non-Discrimination Statement**

Unless otherwise constrained by law, William & Mary is committed to providing an environment for its students and employees that is free from discrimination based on any personal factor unrelated to qualifications or performance such as, without limitation, race or color, citizenship, national origin or ethnicity, ancestry, religion or creed, political affiliation or belief, age, sex or sexual orientation, gender identity or expression, disability, marital status, pregnancy status, parental status, height, weight, military service, veteran status, caretaker status, or family medical or genetic information. William & Mary also provides reasonable accommodations for qualified individuals with disabilities as required by law. William & Mary is an equal opportunity/affirmative action employer and complies with all applicable laws regarding nondiscrimination and affirmative action in admissions, hiring, and all other programs and activities.

# Inclusive Excellence Framework at William & Mary



**Recruitment and Retention (Access & Success)** refers to the compositional diversity among the organization's constituent groups (staff, faculty, students, visitors, patients, alumni, customers, community partners, etc.) and their context-specific outcomes or benefits gained from their relationships with the organization. Processes like recruitment, retention, development, and long-term outcomes (graduation, tenure, career advancement, etc.) are the key focus of this dimension.

**Campus Climate (Climate & Intergroup Relations)** refers to what it feels like for individuals to be here and the behavioral experiences and norms that are present. Effective and innovative cultures depend on individuals feeling comfortable to take interpersonal risks and to bring their whole selves to their work and learning. Measuring constituent perceptions related to feeling respected, belonging, and prevalence of affirming relationships with peers and organizational administration are among the concepts present in this dimension.

**Academic Excellence (Education & Scholarship)** relates to the ways in which curriculum, teaching, research, scholarship, and employee and student development contribute to our passion for discovery, innovation, community engagement, service, and social justice. Programs and processes in this dimension include intentionally designed curricula and pedagogies, as well as targeted professional development activities, that promote intercultural awareness and competence.

**Organizational Culture and Accountability (Infrastructure & Investment)** refers to the policies, resources, organizational and communication structures, and performance measures that inform and enable an intentionally inclusive, equitable, and innovative organization.

**Innovation, Community and Reconciliation (Community & Partnership)** refers to how place-based organizations like ours engage reciprocally and in a participatory way with our surrounding neighborhoods, counties, and the Commonwealth. Specifically, how we as an organization understand and track our impacts in terms of the financial and social well-being of the communities and partners with which we are engaged.



# WILLIAM & MARY

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## *Inclusive Excellence Plan Template*

- I. Introduction-** A brief overview of the university’s Inclusive Excellence plan in relation to department’s mission and a short description of the process used to develop the plan
- II. Self-Assessment-**Reflections on the department’s current strengths, challenges, opportunities, and needs in relation to diversity, equity, and inclusion
- III.** Key strategies for the department taken from the [university’s Inclusive Excellence Plan](#)
- IV. SMART Goals, Actions, Measures, Assignment of Responsibility, Funding/Resources**
- V. Implementation Plan**
- VI. Communication Plan-**A brief overview of the ways in which you will communicate your IE plan, progress, and impacts to stakeholders, community partners, and others. Please include information on how people can monitor progress and participate in the success of the IE plan (i.e. website).

<b>Recruitment and Retention</b>  (Access & Success)	<i>2022-2026: Achieve and maintain a more diverse and inclusive undergraduate, graduate/professional student body, faculty and staff</i>				
SMART Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation

<b>Campus Climate</b>	<i>2022-2026: Create and sustain an organizational environment that acknowledges and celebrates diversity and employs inclusive practices throughout its daily operations</i>				
SMART Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation

<b>Academic Excellence (Education &amp; Scholarship)</b>		<b>2022-2026:</b> <i>Engage students, faculty, staff, alumni and the community in learning varied perspectives of domestic and international diversity, equity, inclusion and social justice.</i>			
SMART Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation

<b>Organizational Culture and Accountability (Infrastructure &amp; Investment)</b>		<b>2022-2026:</b> <i>Create and sustain an institutional infrastructure that effectively supports progress in achieving diversity, equity and inclusion goals in the university strategic plan</i>			
SMART Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation

<b>Innovation, Community and Reconciliation (Community &amp; Partnership)</b>		<b>2022-2026:</b> <i>Grow institutional philanthropy and community partnerships to improve outcomes in local/regional communities</i>			
SMART Goals/Objectives	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation

*\*Template courtesy of Dr. Kevin McDonald, University of Virginia*

# **APPENDIX**



# DEI SWOT Analysis

## Questions to Consider:

- What do we do exceptionally well?
- What advantages do we have?
- What valuable assets and resources do we have?
- What do colleagues/trainees identify as our strengths?
- What are our capabilities?
- What resources, assets, people are in place?
- What are some innovative aspects?
- What accreditations, qualifications, certifications do we have?

## Strengths

## Weaknesses

## Questions to Consider:

- What could we do better?
- What do we need to improve?
- Where are we vulnerable?
- What are the disadvantages of proposition?
- What are gaps in capabilities?
- What are the timescales, deadlines and pressures?
- What institutional/logistical barriers do you anticipate?

## Questions to Consider

- What opportunities do we know about, but have not addressed?
- Are there emerging trends on which we can capitalize?
- What resources are available that may be useful?
- Are there potential partnerships, or agencies that could help?
- Any ways to save time/be more efficient in the development phase (i.e. adapt from an existing resource)?

## Opportunities

## Threats

## Questions to Consider

- What external roadblocks exist that block our progress?
- Are there significant changes coming in our specialty?
- Are economic conditions affecting our ability to accomplish this task?
- Are there any insurmountable weaknesses?
- Any loss of key staff?



# WILLIAM & MARY

OFFICE OF DIVERSITY AND INCLUSION

## William & Mary

### Departmental Diversity Action Plan (DDAP)

#### *Update Report Summary (Due each September)*

Please respond to the following questions below and submit the document via email to Thomas Alexander ([talexander@wm.edu](mailto:talexander@wm.edu)) by **September 1**.

Name of Department/Unit: \_\_\_\_\_

Name/title of Person Submitting Update Report: \_\_\_\_\_

1. What Departmental DAP **goals and priorities** will you focus on during the past academic year?
2. Please describe the **process** by which you have continued to engage your department's faculty, students and staff in discussions in order to seek feedback and in the implementation of your Departmental DAP. If you have a DAP Committee, please describe the work of this committee to date. How inclusive has the process been?
3. What **best practices** would you like to share regarding your approach to your Departmental DAP implementation to date?
4. What are the **challenges** you have faced in your DAP implementation to date?
5. Please share **example(s) of positive outcome(s)** generated by the DAP implementation work you have done to date.