



RAYMOND A. MASON
SCHOOL OF BUSINESS

DIVERSITY PLAN
APRIL 2016

INTRODUCTION

Over the past several years the Raymond A. Mason School of Business at the College of William & Mary in Virginia has invested considerable effort and realized significant progress with regard to diversity and inclusion in our organization and our culture. These efforts have included:

- Developing a diversity and inclusion vision statement;
- Identifying near-term actions and initiatives (“low fruit”);
- Implementing near-term actions, focused on culture, physical spaces, and recruitment/admissions;
- Developing Specific Proposals and Plans for Future Actions and Initiatives.

OUR DIVERSITY AND INCLUSION VISION STATEMENT

During the 2014/2015 academic year a taskforce empaneled by Dean Larry Pulley and Associate Dean Todd Mooradian developed a Diversity and Inclusion Vision Statement for the Mason School. This process was led by nine members of the faculty/staff community¹, included extensive input from the broader community, and ultimately resulted in a statement endorsed by that community.

Before creating a specific vision statement the taskforce decided that it would be useful to: (1) make explicit the rationale for pursuing diversity and inclusion in the Mason School; (2) draft a statement of principles regarding diversity and inclusion in the Mason School; and (3) clarify definitions of diversity and inclusion for our purposes in the Mason School context. Those efforts resulted in specific working documents attached as Appendices A, B, and C (respectively).

The rationale for valuing and investing in diversity and inclusion (Appendix A) included: (1) societal and ethical motives, (2) strategic motives, and (3) legal motives. The Principles (Appendix B) are shared beliefs and standards that guided the development of the Vision and that are intended to guide ongoing decisions about actions and initiatives within this effort. The definitions (Appendix C) recognize that “diversity” is heterogeneity across the people in our communities with regard to various personal characteristics, seen and unseen; “inclusiveness” is the degree to which all members and potential members are welcomed, respected, celebrated, and invested in. The summary of the definitions of diversity and inclusion was borrowed from Wake Forest University:

¹ Todd Mooradian, Rosanna Koppelman, Jennifer Dahnke, Elizabeth Foster, Karen Locke, Don Lowman, Michael Luchs, Kelly Petrey, and Christine Petrovits.

*“diversity is the mix and inclusion is making the mix work.”*² Those efforts to clarify and explicate a compelling rationale, guiding principles, and specific definitions led to the development of our specific vision statement:

The Raymond A. Mason School of Business values and actively nurtures an environment of diversity and inclusiveness where every individual, regardless of how we may differ – for example, but not limited to, with regard to race, religion, gender, ethnic origin, age, socioeconomic status, political preferences, physical abilities, sexual identity, or sexual orientation – is embraced, respected, and afforded the same opportunity to grow, to succeed, and to contribute to the Mason School’s success.

That Vision Statement was endorsed by unanimous votes of both the Mason School of Business faculty and the Mason School of Business staff during the 2014/2015 academic year and has been placed, along with the Mason School Mission and Values³, at a prominent location on our website (see <http://mason.wm.edu/about/mission/index.php> [accessed on 4/16/16]).

² <http://diversity.provost.wfu.edu/home/diversity-inclusion-at-wake-forest/> (4/17/16)

³ **Our Mission:** The mission of the Mason School of Business at the College of William & Mary is to serve the Commonwealth, the nation, and the global community both by offering high-quality educational programs at the undergraduate, graduate, and professional levels and by creating and communicating new knowledge. We fulfill this mission through:

- Building a Faculty whose research, teaching, and service influences students, business leaders, policy makers, and other scholars.
- Engaging Students in innovative educational experiences to nurture creativity, to mentor high ideals, and to accelerate ambitions of leadership so that they will imagine the great business opportunities of the day and seize them.

Our Values: As a global citizen and member of the Mason community, I embrace the following values:

- Respect and responsibility for self and others
- A spirit of generosity
- A life dedicated to inquisitive learning and development

My words, actions, and relationships will demonstrate my commitment to these values within the program and throughout my life.

IDENTIFYING NEAR-TERM ACTIONS AND INITIATIVES

The second phase in our diversity and inclusion initiatives was an “action planning process” designed to:

- *Engage the community* broadly in the initiative;
- Clarify our *objectives, goals, and critical success factors*; and
- *Identifying and organize “low fruit” actions and initiatives* for the School.⁴

Mason School of Business Foundation Board member Joyce Shields facilitated this strategic action-planning process which included a series of taskforce meetings and an ideation session (or “think tank”) held in the Jim and Bobbie Ukrop Innovation and Design Studio in Alan B. Miller Hall on October 10th 2014 attended by 15 members of the Mason School community including faculty and staff. That ideation session identified 65 individual suggestions which were then categorized by the group into a taxonomy of actions/initiatives comprising (Appendix D presents the detailed results):

- Curricular
- Human Resources
- Physical Space
- Communication
- Miscellaneous Programs
- Other

The group then prioritized the ideas by “voting” for up to three that they supported and that they estimated could be accomplished within 30 days (marked with blue dots in Appendix D) and then marking as many items as the individual members chose for ideas with longer (60+ day) timelines (marked with red checks in Appendix D). In order to facilitate input from a broader group of faculty and staff a survey was then conducted using Qualtrics® which generated several more specific ideas within the general taxonomy.

Appendix E is a slide deck summarizing the overall strategic planning process which included the development of the Vision Statement (including the rationale, principles, and definitions as well as the Vision Statement) leading to the identification of specific goals, objectives, critical success factors, and specific immediate actions.

⁴ In this instance “low fruit” was defined as actions and initiatives that would require little time and/or few resources but that would have substantial impacts on diversity and inclusiveness in the School.

EARLY EFFORTS AND PROGRESS

In the 20 months since this diversity and inclusion initiative was launched much has been accomplished but much remains to be done. Some highlights of the actions and initiatives that have been undertaken include: curricular; admissions/recruiting; communications; student organizations and events, and hiring. These are reviewed briefly in this section.

Curricular

Pipeline Course: Diversity in the Workplace. Professor Katherine Guthrie has developed and very recently launched a one-credit courser designed to “help you [the student] develop your distinctive voice as you explore your professional future.” Targeting underrepresented freshmen and sophomores from across campus, this course is designed to help students understand the value of diversity in organizations, and how they can best develop their own distinctive voice to create value for organizations. Weekly class sessions engaged a variety of alumni and faculty, and culminated with a day-trip to the W&M Washington DC Office. We are looking at ways to expand this program to an even larger student audience next year.

Women’s Leadership Summit. On March 19, 2016, the Boehly Center for Excellence in Finance held the first William & Mary Women’s Leadership Summit (WLS) and Stock Pitch Competition at the Raymond A. Mason School of Business. This event had two components: the Smart Woman Securities-sponsored stock pitch competition, which took place in the morning, and the Women in Business-sponsored leadership summit, which took place in the afternoon. Over 90 students from William & Mary and an additional 50 women representing top universities from across the country gathered together for a day of competition, exploration, and engagement. Nearly 60 William & Mary alumni, parents, and other professional guests contributed as stock pitch judges, panelists, and coaches. (Appendix F is the Summit program; see <http://www.boehlycenter.com/#!/wls/c1yyc>). The success of the summit in its inaugural year ensures future opportunities for women to both learn from each other and realize their potential.

Admissions

Undergraduate (BBA) Outreach and Admissions. In 2015, the Undergraduate Business Program completely redesigned their admissions process, moving from a GPA based criteria to a

holistic assessment of candidates. The new process elevates the importance of diversity of backgrounds and perspectives: “Personal attributes and life experiences that illustrate the drive to better oneself and others, resilience in the face of challenges, ethical character, openness to diverse perspectives, entrepreneurial and creative spirit, and a collaborative approach in working with others.” In addition to changing the admissions process, the Undergraduate Business staff focused on outreach to unrepresented groups across campus, in partnership and collaboration with W&M’s Diversity programs such as WMSURE and the PLUS program. They also participated in the multicultural programming offered by the Admissions Office. This change in process and outreach led to an increase in applications of students with diverse backgrounds, with our admitted class showing a 10% increase in students of color from 21% to 31% (Fall 2014 admissions to Fall 2016 admissions).

Master of Accounting (MAcc) Recruitment and Admissions. During the 2014-2015 and 2015-2016 academic years the Master of Accounting program has engaged an outside consultant, Jena Burgess⁵, to increase diversity in the admitted class. That consultant has integrated diversity recruitment into the admissions process. Table 1, from Ms. Burgess’s presentation (Appendix G) compares the processes at the time of the engagement (labeled “Current” in her presentation) to practices that have been implemented or are being implemented in the MAcc admissions office. Other tactics have included identifying “Focus Schools” (including Norfolk State, Hampton University, Randolph Macon College and Christopher Newport University) as well as “Focus Organizations” such as the W&M Center for Student Diversity. Results have been positive and expectations for near-term progress are also optimistic (see Table 2 and Appendix G).

In recent discussions with the consultant she has agreed expand the plan developed for MAcc to all programs within the Mason School. Some of her next activities will include creating an MBA Ambassador program. The program will identify diverse students willing to communicate with potential students in addition to more broadly sharing their own personal experiences. Work has begun with the Mason Marketing team to include additional diversity student spotlights and success videos on the website. She will review the online application process to determine where in the process we lose possible diverse applicants and update the process to reduce the numbers of “not complete” applications. We will change the mailing process to Priority service for accepted students. Lastly, identify Minority Serving Institutions (MSI) to both broaden messaging and better align lead generation opportunities.

⁵ See <http://coachjenab.com/>

TABLE 1: Diversity Consultation for the Master of Consulting Program Admissions

CURRENT PROCESS	CHANGE
No review of demographics in pipeline	Weekly holistic review of pipeline
No outreach to incomplete applicants	Weekly emails to assist incomplete applicants
No tracking system for diverse students	Excel tracking of status / outreach / details
Students scheduled in order of applications	Prioritized scheduling based on target demographics
Acceptance alerts shared via email / snail mail	Phone calls made to accepted students
No connections made to program / broader campus community	<ul style="list-style-type: none">• Assigned to ambassador• Introduction to campus resources• Introduction to faculty

“Current Process” refers to those processes in place before the consulting engagement.

TABLE 2: Under-Represented Minorities in the Master of Consulting Program

YEAR	NUMBER	PERCENT OF CLASS	PLACEMENT
2015	7	7%	100%
2016	11	10%	70% (as of March, 2016)
2017 (Objective)	18	15%	100%

Master of Business Administration (MBA) Recruitment and Admissions. The *Full-Time MBA Program (FT-MBA)* consistently yields a diverse cohort of MBA candidates. The Fall 2016 incoming class included 42 international candidates of 99 total enrollees. 16 different countries were represented among the cohort. The domestic figures for ethnicity, race and gender were also diverse. Of 57 U.S. Citizens the breakdown of self-reported ethnicity and race were: seven African American, six Hispanic, five Asian, two Multi-Racial/Multi-Ethnic, and one Native American. Women comprised 38 of 99 candidates in the FT MBA cohort, which is slightly higher than the national average for full-time MBA programs.

The admissions team works through National Association of Hispanic MBAs (Prospanica), National Society of Black MBAs, and National Association of Women MBAs to offering programming and networking that is appealing to diverse candidates. The admissions team partners with global recruitment firms including Education USA (sponsored by the U.S. Department of State), The MBA Tour and QS World MBA Tour to attract talented and diverse MBA candidates from around the globe. The FT MBA has a long-standing reputation for a highly diverse learning community with an emphasis on global citizenship and cultural competency.

Communications

Vision. As noted above, one of the important steps in launching a renewed and more vigorous approach to diversity and inclusiveness in the Mason School was to develop, promulgate and gain commitment to a fresh “Diversity and Inclusion Vision Statement.” That new Vision Statement is now displayed prominently at the Mason School website (see <http://mason.wm.edu/about/mission/index.php> [accessed on 4/16/16]).

Cross-Campus Outreach. In communicating the changes in the BBA-Program admissions process and criteria, the BBA Program Office developed specific outreach communications, including information sessions and dedicated programming, targeting diverse groups across campus, in coordination with the College’s Diversity Office. Several co-sponsored workshops were held for students participating in the PLUS (Preparing for Life as a University Student) and WMSURE (W&M Scholars Undergraduate Research Experience) programs, Members of the BBA advising team attended numerous on-campus professional development workshops which have enhanced our support of an increasingly diversity student population within the Mason School. Those efforts have been led by Jen Dahnke and Whitney Turner.

Graduate Outreach and Recruitment. As discussed above, the Master of Accounting program has invested in several activities and tactics including tracking “the admissions funnel” with regard to diversity at the various stages of recruitment and targeting “Focus Schools” and target student organizations with communications and outreach with the objective of recruiting more diverse classes into the MAcc program. As reviewed above, outcomes of those communication efforts have been positives (See Table 2).

Student Organizations and Events

Smart Woman Securities. In 2015, a team of undergraduate women working with the Mason School and, specifically, the Boehly Center, founded a chapter of this national organization dedicated to financially empowering collegiate women of all majors (Smart Woman Securities[1]). The club held its first 10-Week Seminar Series during the fall semester, offering a curriculum that moved through financial basics and ended with advanced market analysis. Over 30 students from a diversity of majors and class years completed the Series and final investment project, learning from a number of Mason faculty members who presented the material. The highlight of the semester was a guest lecture from Dr. Elsa Fornero, a Professor at the University of Turin and former Italian Minister of Labor, Social Policies, and Gender

Equality, who emphasized the value of financial literacy. This spring, club members participated in research teams to further develop the skills learned in the Seminar Series and expand their knowledge of financial markets. The chapter looks forward to hosting another Seminar Series in the fall in addition to bringing in guest speakers to further enhance club members' experiences. See

Black Law Students Association's annual symposium. The Mason School sponsored William & Mary's Black Law Students Association's annual symposium concerning issues on Race and the Law on February 25th, 2016. Titled "Systematic Suppression: Mass Incarceration and Voter Disenfranchisement," the event featured lively panel-style discussion between established experts in the field.⁶

Queer Night of Expression. Hosted one LGBTQA/Lambda event Queer Night of Expression, to be held in the Brinkley Commons on Saturday evening, November 14th, 2015.

LGBTQ Pride Festival. Sponsored another LGBTQ event on April 8th 2016, the Lambda Alliance, the College's LGBTQIA advocacy group, held William and Mary's annual LGBTQ Pride Festival on the Sunken Garden and the Mason School was a sponsor.

Hiring

We have initiated specific efforts to attract more and more diverse candidates to our job searches at the earliest stages at the early stages in order to continue to focus on merit at the later stages (campus interviews and offers) and, at the same time, yield more diverse hires. As part of that effort we have, for example, become a sponsoring member of the PHD Project⁷. We have also developed job-posting strategies that spend more effort finding targeted ad placements to be sure diverse audiences are aware of open positions in the Mason School. These efforts and a general amplification of diversity in our objective sets when searching have led to terrific early results. Over the past 20 months we have hired six full-time faculty members. Three are women. Three are people of color. One is LGBTQ. See our new faculty in the Table 3.

⁶ See <http://law.wm.edu/news/stories/2016/annual-blsa-symposium-explores-theme-of-systematic-suppression.php>

⁷ W&M's support is recognized: <http://www.phdproject.org/support-the-phd-project/participating-universities-2/>

TABLE 3: New Faculty Hires - 2014-2016

 <p>Michelle Bertolini Accounting Clinical - Arrives August 2016</p>	 <p>Satish Boregowda Business Analytics Clinical - Arrives August 2016</p>	 <p>Margot Howard Accounting Assistant Professor</p>
 <p>Hugh Marble Finance Clinical</p>	 <p>Ken Njoroge Accounting Assistant Professor</p>	 <p>Rachel Stephens Accounting Clinical - Arrives August 2016</p>

Physical Space

Participation in Let Freedom Ring. It was a Mason School faculty member, Ron Monark, who first conceived the Let Freedom Ring celebration at the First Baptist Church. Ron and others including Tom Marini, Rosanna Koppelman, Chris Adkins, and Jennie Davy then developed a two part program for Mason for Black History Month that tied into the extensive programming of the Let Freedom Ring celebration. First, with the help of Swem Special Collections, materials were assembled and placed in four display cases in the Miller Hall atrium that told the story of the historical black business district, known as the Triangle Block bounded by Scotland Street, Prince George Street and Armistead Avenue. It included many stories from diverse documents as (a) the historical family records and pictures of QuoVadis Williams Wright that included her grandfather, who was an entrepreneur and landlord to many black business and an aunt, Pearle Webb, an entertainer and songwriter and (b) the financial records of Samuel Harris, who was probably the richest man in Williamsburg and who lent money to President Ewell and the College, although W&M was totally white at that time.

Second, Rosanna Koppelman, Executive Director of the [Center for Corporate Education](#), organized a lecture series that featured segregation-era Williamsburg residents Russell Hopson and Edith Heard speaking on “Free Black Families of Southern York County: 1690 until Pre-Civil War Era” and “Early Black Businesses of Williamsburg,” respectively. Appendix H is a very recent article from the William & Mary News on the Exhibit and Speakers at Miller Hall.

Miscellaneous

In August 2015 the Mason School sponsored a day-long training seminar – cosponsored by the William and Mary Police Department and Chief Deborah Cheesbro – on Sexual Assault Prevention. The seminar, “Bringing in the Bystander,” was presented by the University of New Hampshire’s Prevention Innovations Research Center.⁸

In April 2016 the Mason School hosted Pamela Eddy from the School of Education to conduct a seminar for faculty titled “Creating Better Learning Environments”. The outcome of the seminar will result in faculty being able to create more inclusive classrooms and experiences for our students. The synopsis of the session focused on identification of individual teaching preferences and how these personal preferences influence classroom dynamics. Students learn differently, and the range of learning styles influences how they react to teaching strategies. A focus of the session is on the ways faculty can create and use teaching strategies that connect to a variety of learning styles and experiences. Student learning builds on past experiences, and critically reflective teaching practices can help faculty members better understand how their own underlying assumptions drive the ways in which they connect with students.

⁸ <http://cola.unh.edu/prevention-innovations-research-center> (4/18/16)

OUR PLANS – GOALS, OBJECTIVES, AND METRICS

After our Vision and Mission Statements, which stipulate what we want to be in the future and why, the highest level constructs in organizing the leadership of diversity and inclusion efforts are goals and objectives. Goals are the way we desire to be (our vision expressed as specific characteristics). Objectives bring goals to life by stipulating more specifically what has to happen to achieve those goals in relatively specific terms. Metrics are observable and relatively-objective variables that can be measured to gauge progress toward objectives and goals and to determine gaps between objectives and progress.

Goals. It is our goal to be a leader on campus, amongst business schools, and in the academy with regard to:

- *Advance diversity in our organization:* Attracting, encouraging, and advancing diverse peoples into lives of principled accomplishment.
- *Build an increasingly more inclusive culture:* Welcoming, respecting, and supporting everyone in the Mason School community.
- *Communicate our values and support for others* including especially perspective members of our several communities.
- *Develop curricular and co-curricular educational materials;* Becoming a leader in the production of knowledge and pedagogical tools for fostering inclusive mindsets in leaders and future leaders in the Mason School and beyond, including across higher education and across business practice.

In order to achieve these goals we plan to:

- Proactively recruit and admit/hire more diverse groups to our student bodies and faculty;
- Create a Standing Committee focused on Diversity and Inclusion;
- Create and fund a Director for Diversity and Inclusion in the Mason School;
- Foster a more inclusive environment;
 - Faculty development
 - Exhibits and speakers;
- Stipulate Specific Metrics;
 - Diversity Metrics;
 - Inclusiveness Metrics.

- Other “low fruit” activities to foster diversity and inclusion;

Recruitment, Admissions, and Hiring. Continue and enhance proactive recruitment of under-represented minorities to all constituencies including faculty, staff, and student cohorts. These efforts include, as described above, outreach efforts by the various admissions offices (BBA, One-Year Masters, and MBA) and active recruitment “at the top of the funnel” intended to attract more and better qualified candidates of all sorts to programs and open positions. Continue calibrating and investing in position postings to targeted media and increase investments in those efforts.

Standing Committee. The Deans have chartered a standing Committee on Diversity and Inclusion and will be empaneling that committee during the Spring 2016 semester to manage and coordinate the initiative on an ongoing basis. This committee will be charged with developing and implementing specific new activities and for continuing the nascent investments and initiatives reported in this document. Some of the specific activities that are ongoing or planned at this time include a proposal to develop support for a Director of Diversity and Inclusion in the Mason School, planned seminar on building inclusive learning environments in late April 2016, a planned exhibit to build on the momentum created by the exhibit on African Americans in Williamsburg Commerce to focus on women in commerce, and the initiation of more complete measurement policies to track metrics across time with regard to diversity and inclusion. These several planned actions are described briefly below.

Proposal for Director. Appendix I is a PBR request submitted to the College to fund a position – a Director of Diversity and Inclusion – to organize, energize, and manage ongoing Diversity and Inclusion. The Development Office in the Mason School and the Associate Dean for Faculty and Academic Affairs has begun developing a proposal to potential sponsoring organizations to fund this potentially transformative position and the associate budget. There have been promising early conversations with a large consulting/accounting firm in these regards.

Faculty Development. Increase investments in faculty development including bringing seminars into the Mason School and investing in individual faculty members attending conferences and seminars off campus. As described, during April 2016 the Associate Dean for Faculty and Academic Affairs’s Office arranged for Professor Pamela Eddy from the College of William & Mary’s School of Education to present an hour-and-a-half seminar, “Creating Inclusive Learning Environments.” Building in part on the School of Educations College

Teaching Certificate Program⁹ and working with Professor Pamela Eddy and others, we will offer faculty and staff professional development opportunities (like the Creating Inclusive Learning Environments Seminar) to enhance teaching and advising skills in general and, in particular, to foster the skills and mindsets necessary to enhance inclusion in our classroom and in all we do.

Exhibit and Speakers. We have begun planning for another exhibit intended to emphasize diverse peoples' contributions to business, entrepreneurship, and leadership. The year 2018 will be the "Year of the Women" at the College of William and Mary, celebrating 100 years of enrolling women as undergraduates. As emphasized in the article on the February 2016 exhibit on the role of African Americans in Williamsburg commerce: "Next year is the [100-year anniversary] of women on campus," Mooradian said. "We plan to create a similar exhibit to celebrate the accomplishments of women in the Williamsburg community."

Metrics. We have identified two sources of reasonable, valid metrics to tie to our Diversity and Inclusion initiative goals and objectives:

- *Diversity Metrics.* With regard to diversity (heterogeneity across the individuals who make up the group), the College and the Mason School have collected descriptive data regarding the diversity of our faculty, staff, and students related to relatively observable characteristics upon which we hope to improve include demographics. The most recent data regarding faculty and staff from the College's Office of Diversity & Equal Opportunity are presented graphically in Appendix J. Those data do not include the recent hires described above (also see Table 3 above).

With regard to the student bodies, the Undergraduate (BBA) program has recently increased its diversity by approximately 50% moving from about 20% to over 30% across 18 months. As a result of efforts described above (including the engagement of a focused consultant working to increase diversity), the graduate accounting program, the MAcc, has increased from 7% to 10% across twelve months (see Table 2 above). As noted above, the MBA program includes 42 international students and 57 domestic students in this year's class. Of the 57 U.S. Citizens seven are African American, six are Hispanic, five are Asian, two are multi-racial/multi-ethnic and one is Native American (self reported). Of the 99 candidates in the FT MBA cohort, 38 are women, which is

⁹ See: <http://education.wm.edu/academics/eppl/collegeteachcert/index.php>

slightly higher than the national average for full-time MBA programs. These data are baselines for establishing forward-looking goals and monitoring progress toward those goals.

- *Inclusiveness Metrics.* With regard to *inclusiveness*, we have not begun measuring baseline data with regard to perceptions of inclusiveness, which is unfortunate because initiatives that have already been launched have, it may be assumed, affected those perceptions.
 - One set of data that may serve to establish some baselines are those from the 2013 College-wide Faculty Survey (Appendix K) which describe faculty perceptions of satisfaction and fairness analyzed by gender.
 - We have identified scales to gauge inclusiveness *as perceived by* enrolled students and populations of potential students such as, in particular, underclass students (freshmen and sophomores) at the College. Those items (Appendix L) have been adapted from the published Perceived Inclusion Scale (Jansen, Otten, Zee, and Jans, 2014; appended as Appendix M).
 - We have also identified specific items used at Cornell University to measure inclusion and inclusion-related perceptions for administration to enrolled and graduating students (Appendix N is the graphic presentation of results for Cornell University, the source of these items), and will include those items in surveys to establish baselines for monitoring and shaping these diversity and inclusion efforts on an ongoing basis. One early task of the Standing Committee (see above) will be assemble these and other metrics into a Diversity and Inclusion Dashboard for the School.