



WILLIAM & MARY

CHARTERED 1693

OFFICE OF UNIVERSITY ADVANCEMENT

University Advancement Inclusive Excellence Plan

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Introduction

As a team, University Advancement, has developed an **Inclusive Excellence Plan** that will augment William & Mary's strategic efforts to strengthen diversity, equity and inclusion across the entire university.-As part of Vision 2026, the plan addresses our goals to establish an inclusive culture of engagement and philanthropy, which will fuel efforts to secure critical resources for W&M's future.

The relationship between our University Advancement mission and the university's Inclusive Excellence Plan is best characterized through a shared commitment to the university's core values. These values are always top of mind, informing our thinking and approach to our interactions with each other and with alumni, donors, parents, and friends of the university, while fostering a sense of community where all can thrive.

The plan results from a comprehensive planning effort conducted in 2022. The team will review the goals and actions and assess outcomes on a regular basis over the next five years. This is a working document that will continuously evolve to ensure that we excel and achieve the objectives outlined. The plan will both help keep these goals top of mind while holding the team accountable for this important work, which is never done but will move us forward in meaningful ways.

UNIVERSITY ADVANCEMENT MISSION STATEMENT

Through our efforts to build a robust and inclusive culture of engagement and philanthropy, University Advancement strengthens connections between William & Mary and our vibrant community to ensure that the university and its people thrive for all time coming. By fostering lifelong relationships and creating meaningful opportunities, the team enriches the quality of the William & Mary experience and propels the university forward to address the most pressing needs of our time.

Self-Assessment

As part of the planning effort, an assessment was conducted to evaluate University Advancement's strengths, challenges, opportunities and needs that would help inform the plan and the goals for the next five years.

Strengths

There is genuine commitment to D&I across University Advancement at William & Mary. As a result of our efforts through our *For the Bold* campaign, William & Mary has emerged as an industry leader in philanthropy in higher education, leading the way as the number one public university in alumni participation and the only university without a medical or engineering school in the US to raise more than \$1 billion in a campaign. Throughout this work and success, we established an internal D&I Committee, supported the 50th anniversary of black students in residence, created a nationally recognized women in philanthropy program for W&M alumnae and raised funds for Hearsh: The Memorial to the Enslaved at William & Mary. We built new programs to support our growing

communities of diverse identities and affinities, grew innovation in existing programs while leading in critical ways to support inclusive excellence, as thought partners for whole university thinking at W&M.

University Advancement has cultivated a mindset that diversity and inclusion are top of mind for employees in the workplace and in our external work with the W&M community. We have done this over the course of several years, with our University Advancement Diversity & Inclusion Committee as part of that effort, and including our annual climate survey, intentional inclusion of diversity topics and initiatives in our All-Staff meetings, and in our recruitment and hiring efforts. We continue to measure our progress and our success in cultivating this mindset across our team.

Our staff are given opportunities to participate in professional development training within their specific areas of focus as well as more broadly through DEI sessions provided by the university, central office of Human Resources and professional associations. Supplemental trainings are also offered through cross campus partnerships with other units and teams, and, internally, through the efforts of our Executive Leadership Team, Talent Team and our D&I Committee.

Challenges

In University Advancement, we work with alumni, parents of current and former students and friends of the university as well as current students, employers, corporations and foundations. We are aware that the alumni experience is often very different than our current students' experiences -- for that reason, it is important that we face the challenge to engage and acknowledge and cultivate a deeper relationship for alumni with W&M as it is today, while also giving voice to their past student experiences, and integrating their voices into our strategies.

We also know that we need to improve our efforts to audit how we help and support first generation students, student veterans, and students from other underrepresented groups that comprise our vibrant community. Our efforts to support these populations are fully integrated into our work. We are creating space to have direct conversations about how we can use data, audits of our work, to assess and improve.

We have tended to focus on racial and physical diversity in our D&I work and have been less focused on individual diversity, which presents a challenge for us to develop strategies that encompasses issues related to gender, politics, religion, neurodiversity and physical diversity, which impact our day-to-day interactions across the organization and the audiences we support.

Covid-19 had several impacts on our team, including a budget reduction and significant cultural and social changes. As is common in our industry, we are managing staff transitions in some key areas of our team that result from the close of our campaign. With those staff losses, our team is stretched, and the culture that we built throughout the last campaign, between 2011 and 2020, needs rebuilding and reigniting. It is a challenge and an opportunity for our supervisors to impress upon our University Advancement employees that our D&I priorities and initiatives must be integrated into all facets of our recruitment and hiring efforts as we lift our hiring freeze. Additionally, we face challenges to develop avenues and enhance existing strategies to recruit and hire professionals with transferrable skills, who represent a more diverse population than professionals currently working in our field.

Opportunities

We are excited to build on the success of our most recent campaign and plan for our future, in terms of our engagement and fundraising efforts, internship pipeline, and our talent pipeline, in support of Vision

2026 and beyond. We are excited for the next chapter of our fundraising and engagement efforts, with room to grow, to be intentional about our responsibility to plan and measure our strategies and initiatives for diversity and inclusion in all that we do.

We have the opportunity to build upon our D&I priorities across all of University Advancement, as we hire new staff. As we expand the size of our team, we will seek to incorporate best practices and to improve messaging and outreach across our recruitment and hiring efforts to send a clear message that D&I is central to our collective work. Through this work, we will also be more intentional about how we structure our staff, including creating a new position in FY23 that will focus on D&I priorities in recruitment, hiring, training and reporting. University Advancement will be the first non-academic unit at the university with a role of this kind, a position that will sit on the Office of Diversity & Inclusion's Leadership Council, alongside counterparts in law, business, A&S, education and VIMS.

A central point of emphasis over the next few years will be to align our engagement and fundraising efforts with Vision 2026 and its cornerstone initiatives in Democracy, Water, Data, and Careers, and to use our work in these areas to accelerate our D&I efforts. There is particular opportunity for us to infuse our D&I work into the Careers cornerstone now that the career development and professional engagement team are part of University Advancement.

Needs

Our future work in University Advancement will require that we recruit, hire and retain a diverse and talented team that matches the diversity of our 100,000+ alumni and friends and the population of the country today. Our ability to build a stronger culture of engagement and philanthropy will depend on resources. It will also require a more coordinated effort with our central Human Resources Office and other entities across campus to effectively partner on our recruitment, hiring and retention work to accomplish our shared objectives around D&I.

To ensure that we are also maximizing the effectiveness of our external D&I work, we must invest in technology and data that allows us to better gather and track information and identify the specific makeup of our audiences so that we can better serve them. With improved data management, we can create more personalized messaging and customized events that better reach and resonate with our various audiences.

Key Strategies

Our inclusive excellence strategies will be centered around increasing the sophistication and execution of the work we already do. To accomplish this charge we will:

1. Ensure that our teams are well trained and resourced to accomplish key goals and actions.
2. Ensure we are taking responsibility to play a role in William & Mary's efforts for lifelong engagement.
3. Secure private support for the university in a changing world.

Implementation Plan

Implementation of our inclusive excellence plan will continue through 2026. During that time, we will regularly update our progress, assess outcomes, and re-evaluate our goals.

Each of our five teams in University Advancement will be engaged in executing the SMART goals outlined across the five priority areas of inclusive excellence. Achieving our goals will require us to partner with colleagues across University Advancement and other administrative and academic divisions of the university – Student Affairs, the Office of Student Veteran Engagement, and the Office of Diversity & Inclusion as well as student groups and academic units – in our efforts.

In addition to goals related to philanthropy, we have included goals related to engaging alumni, students, parents, and friends of the university, providing opportunities for fellowship and community and educating them on the university's priorities through media, events and other channels. University Advancement's priority is creating a culture of engagement and philanthropy. Successful and healthy philanthropy does not exist without an engaged, vibrant, and diverse community.

Communication Plan

Our communication plan will center around an annual internal review of our progress toward our goals for inclusive excellence, with input from University Advancement leadership and their teams. We will regularly share our progress internally at our University Advancement All Staff meetings, and at our annual Professional Development Day in July, and through other internal communications channels throughout the year. These regular updates will ensure that our internal stakeholders are kept apprised of the impact their efforts are having on our inclusive excellence goals.

In addition to this working document, we will also share our plans and updates externally on our website, and evidence of our efforts will be reflected through the Alumni Magazine, social media, and other platforms. Our external stakeholders, alumni, parents, friends of the university, will see the many ways that we are integrating inclusive excellence into our work, as well as their connection to Vision 2026, through these communications and updates.

Conclusion

Our promise to our W&M community is that our commitment to inclusive excellence will be evident in all that we do. Work to improve diversity, equity and inclusion requires relentless attention, mindfulness, and intentional effort. Achieving the goals outlined in this plan will not end our important work in this arena but accomplishing them will propel us forward in meaningful ways that will help us to evolve and excel in support of William & Mary's mission, vision and values.

SMART Goals

1. Recruitment & Retention					
2022-2026: Achieve and maintain a more diverse and inclusive undergraduate, graduate/professional student body, faculty and staff					
SMART Goals	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Raise \$15M for scholarships to enhance diversity across campus (i.e. Pell, first-gen, etc.)	Implement an annual fundraising plan to meet financial goal	Financial metric	Over 4 years	Development: ED, Scholarships and Student Affairs Philanthropy	Development staff salary under AVP, Campus Initiatives
Raise funds to provide salary support for hiring and retention for tenure-track faculty who contribute to campus diversity	Raise \$1M in expendable/endowed funding	Financial	Over 4 years	Development Staff	AVP, Schools & Academic Initiatives
Create opportunities for alumni and SUA to interact with underrepresented current and prospective students to support admission yield and alumni engagement efforts	Grow the number of staffed college fairs. 1. Secure funding to enhance marketing efforts 2. Enhance marketing to grow number of volunteers 3. Create a volunteer stewardship program	Number of fairs staffed, and number of volunteers mobilized each year	FY25	WMAA/ Inclusion Initiatives / Director/Asst. Dir./ICARE Volunteer Leadership	WMAA
	Enhance opportunities for students to interact with underrepresented alumni by creating a diverse set of	Student and alumni participants in Homecoming weekend and other key alumni	FY24	WMAA/Inclusion Initiatives team/All staff/UMark	WMAA

	<p>engagement experiences Set date.</p> <ol style="list-style-type: none"> 1. Engage volunteers and staff in planning 2. Engage staff in implementation from marketing to event management. 	engagement experiences.			
	<p>Create opportunities for underrepresented prospective students to interact with alumni through yield events in collaboration with alumni admission, UMark and undergraduate admission Create plan for engagement like regional PFC receptions.</p> <ol style="list-style-type: none"> 1. Engage admission and alumni engagement staff in planning and execution 2. Identify locations with both high volumes of prospective students and alumni. 	<p>Host 3 yield events Increase yield of underrepresented undergraduate students</p>	Spring FY 23	WMAA Alumni Admission/Student and YA Engagement/UMark	WMAA/OUA
Create opportunities for SUA to engage with student leaders of diverse and underrepresented student organizations	<ol style="list-style-type: none"> 1. Host an annual series of SUA student leader events 	Increase interactions between student leaders and organizations with SUA,	FY23	WMAA/CARE/Student & Young Alumni Engagement	WMAA

	2. Engage student leaders w SUA in meeting board members	WMAA and other boards.			
Develop a comprehensive digital marketing strategy to improve engagement with underrepresented students and families	<ol style="list-style-type: none"> 1. Conduct focus groups with Student Assembly, FLGI, WMSure, W&M Scholars, Posse Scholars, Center for Student Diversity students 2. Conduct digital audit and market research to identify gaps and opportunities 3. Determine how to improve data to execute recommendations 	<ul style="list-style-type: none"> • Implement a tracking system to monitor activity and effectiveness • Increased visits – in person and virtual (You Visit) from underrepresented groups • Increased participation in Autumn Blast, YouBelong and DFAS • Increased number of applications from targeted audiences • Increased yield from designated segments 	<ol style="list-style-type: none"> 1. FY23 2. FY23 3. FY24 4. FY24 	UMark, Admission, IT	UMark
Optimize Slate and other technology to create customized content for underrepresented groups	<ol style="list-style-type: none"> 1. Provide professional training for UMark and Admission staff to increase fluency with Slate 	<ul style="list-style-type: none"> • Access granted • Training acquired • Staff hires 	<ol style="list-style-type: none"> 1. FY23 2. FY23 3. FY24 4. FY24/25 5. FY24/25 	UMark, Admission, IT	UMark

	<ol style="list-style-type: none"> 2. Hire digital marketing specialists to build out new collateral designed for underrepresented groups 3. Implement recommendations from the digital audit to integrate Slate into the prospective student’s user experience 	<ul style="list-style-type: none"> • Increased number of segmented/targeted emails • Increased number of segmented/targeted emails and personalized comms triggered by individual actions 			
<p>Expand Affording Opportunity efforts to more effectively articulate W&M’s value proposition and need based financial aid offerings</p>	<ol style="list-style-type: none"> 1. Create a new affordability brochure – 2 versions – one for in-state with need, one for OOS Develop a marketing plan to utilize social media, W&M’s website, and Slate emails to highlight affordability and create an optimal user experience (include in digital audit) 2. Develop fundraising collateral to encompass giving opportunities that support the full breadth of the W&M experience 3. Offer an Affording Opportunity resource 	<ul style="list-style-type: none"> • Increased number of applications from Pell and FGLI students • Increased yield from Pell and FGLI students 	<ol style="list-style-type: none"> 1. FY23 2. FY24 	<p>UMark, Admission, University Advancement, UComm</p>	<p>UMark</p>

	<p>session following admission tours</p> <ol style="list-style-type: none"> 4. Create customized emails highlighting student success 5. Incorporate information into Fall Focus, Autumn Blast and other admission events 6. Conduct trainings for tour guides, Admission staff 7. Incorporate information into guidance counselor comms 				
<p>Engage students to better understand their perspective on the prospective student experience</p>	<ol style="list-style-type: none"> 1. Attend college fairs and other university admission tours 2. Conduct mini positioning study targeting prospective students 	<ul style="list-style-type: none"> • Focus groups conducted • College fairs attended • Positioning study conducted • Increased visits – in person and virtual (You Visit) from underrepresented groups • Increased number of applications from targeted audiences 	<ol style="list-style-type: none"> 1. FY23/24 2. FY23/24 3. FY24/25 	<p>UMark, Admission</p>	<p>UMark</p>

		<ul style="list-style-type: none"> • Increased yield from designated segments 			
<p>Improve marketing to high school guidance counselors</p>	<ol style="list-style-type: none"> 1. Update data to accurately identify counselors 2. Conduct survey/focus group to ascertain needs and most effective ways to communicate 3. Consult with Posse Foundation to determine how they engage counselors 4. Reinstigate day on campus for counselors 5. Develop marketing materials to meet their needs 	<ul style="list-style-type: none"> • Counselor list purchased and verified by student intern • Focus groups completed • Posse Foundation consulted • Increased visits – in person and virtual (You Visit) from underrepresented groups • Increased number of applications from underrepresented students • Increased yield of underrepresented 	<ol style="list-style-type: none"> 1. FY23 2. FY24 3. FY23/24 4. FY25 5. FY25 	UMark	UMark

2. Campus Climate					
<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	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Increase number of diverse alumni with active volunteer roles and the percentage of diverse candidates for alumni awards	<ol style="list-style-type: none"> 1. Work with network leaders to assist in marketing and recruiting volunteer roles to diverse alumni audiences, including Inclusion Initiatives networks and student orgs 2. Discuss during annual review with network leaders 3. Provide DEI training for volunteer leaders 4. Include DEI statement in roles & responsibilities 	Representation of underrepresented alumni serving as volunteer leaders commensurate with alumni body	FY24	WMAA/CARE/Inclusion Initiatives/Assoc Dir, Vol Mgmt	WMAA
Increase participation of diverse alumni and inclusive programming in signature events.	<ol style="list-style-type: none"> 1. Improve data collection and management to inform event planning strategy 2. Engage current Alumni Association Board and affinity/identity group leaders in recruiting diverse participants 3. Use WREN to track both invitations extended, to 	Increased participation in Signature events by underrepresented communities	FY23/24	Signature Events/Umark/Inclusion Initiatives	WMAA/OUA/Alumnae Initiatives Endowment/Umark

	<p>whom, and results to determine impact</p> <ol style="list-style-type: none"> 4. Provide diverse programs that represent and attract diverse alumni. 5. Assure that diverse alumni are represented in communication of events. 6. Create entertainment and engagement opportunities during signature events that are representative of an increasingly diverse alumni body. 				
Alumni House to include inclusive visual elements and recognition of diverse participants and leaders	Conduct assessment and develop implementation plan	Increase in number of displays and presentations in AH that reflect sense of belonging for all alumni	EOY FY 23 Completion	Business Development, Alumni Engagement	Advancement (Alumni House income)
Strategy 3	<i>Create meaningful dialogue between and among groups that increases understanding of varied perspectives and the nature of social and economic inequalities</i>				
Provide University Advancement staff opportunities to engage in meaningful dialogue to increase understanding of varied perspectives and the nature of social and	<p>Plan opt-in events and All Staff regular meetings and annual professional development day:</p> <ol style="list-style-type: none"> 1. W&M Stands 2. W&M Stands: Still Standing 3. Human Library 4. Lunch & Learn 	<p>Number of events scheduled, attendance at each meeting, follow up feedback via quarterly surveys</p>	<ol style="list-style-type: none"> 1. 2021-22 2. FY23 3. FY24 4. Ongoing 5. Ongoing 6. Ongoing 7. Ongoing 	Talent Team with volunteer D&I Committee	Talent Engagement

economic inequities and differences	5. Book Club 6. All Staff Professional Development Day 7. Bias conversations	addressing the past quarter's events			
Plan and encourage participation in fellowship and educational opportunities that build community and are related to D&I.	Tribe Football Tailgates, etc. Celebrate Black History Month, Pride Month, etc. Encourage staff to attend campus events focused on diversity, inclusion and belonging, i.e. Juneteenth, Lemon Project Events, etc. EAB and CASE training opportunities.	Attendance, engagement, and participation	FY23-26	Talent Engagement	Talent Engagement
Elevate awareness among Advancement staff of recruitment and hiring policies and practices relative to biases in hiring and our priority to build a diverse talent pipeline	Share written policy and guidelines for recruitment and hiring for search committees and search committee chairs: job postings reach diverse populations. Track and report on diversity of search committees, semifinalist and finalist candidate pools, as well as diversity of hired employees year over year.	Increased prioritization of and buy in for building a diverse talent pipeline, recruiting and hiring a diverse staff. A diverse talent pipeline, applicant and candidate pool, and new hires.	Ongoing	Talent Engagement	N/A
Strategy 5	<i>Offer educational and celebratory events for students, faculty and staff, and the community that recognize, value and honor diversity and promote inclusion. Evaluate programs for their impact on climate for diversity and inclusion</i>				
Conduct regular Advancement Climate Surveys	Advancement-wide climate survey that includes D&I component	Response rates, feedback and responses to topics	Annually	Talent Engagement with volunteer	Talent Engagement

		brought up throughout the survey, benchmark our responses against other institutions		support from D&I Committee	
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3. Academic Excellence					
2022-2026: Engage students, faculty, staff, alumni and the community in learning varied perspectives of domestic and international diversity, equity, inclusion and social justice					
SMART Goals	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Increase creation and distribution of diverse student stories that highlight applied learning opportunities, internships and career success	Use FY22 stories to determine types and modes of student stories to develop the strategy for FY23 Audit current stories and curate new stories for our students that showcase diversity and inclusion. Piloting a collection method for student stories.	Use FY22 stories to determine types and modes of student stories to develop the strategy for FY23	FY23/24	Career Development & Professional Engagement Tiger Team and Advancement Partners	Career Development & Professional Engagement. Story
Increase student participation by 3% for the Career Diversity Expo FY23	Use a Net Promoter Score to assess student satisfaction	Use baseline of FY22 attendance to achieve the	Office of Career Development & Professional	Use Fall 2022 and Spring 2023 to achieve	N/A

	with the event. Use that scoring system to market the event to students to increase participation	stated goal of a 3% increase	Engagement (Renard Miles) and Campus Partners-Center for Student Diversity, Office of Student Veteran Engagement, Student Leadership Development, WMSure, Sharpe Community Scholars, Athletics.	the 3% goal for Fall FY23	
Provide tools and resources to enable affinity, regional and professional networks to offer programs focused on cultural education	<ol style="list-style-type: none"> 1. Work with faculty and staff to determine travel in market 2. Coordinate, collaborate with Democracy Initiative, Inclusion Initiatives, Career Development for topics 3. Focus on key markets for in-person 	1 program each in 3-4 key markets – DC, Richmond, NY, SHR	FY24	CARE/Inclusion Initiatives/Sr. Director	WMAA

	4. Focus on virtual for all regions				
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4. Organizational Culture and Accountability

2022-2026: Create and sustain an institutional infrastructure that effectively supports progress in achieving diversity, equity and inclusion goals in the university strategic plan

SMART Goals	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Establish philanthropic and participation goals for affinity and identity groups	Assess capacity, affinity and identity to determine appropriate levels	Financial and Participation	Over 4 years	Development	AVP, Development & AVP, Campus Initiatives
	Increase number of proposals by 25% and establish 4 new corporate/foundation financial partners; assess donor interest and develop individual prospect pool Seek corporate and foundation support as well as individual support for key gateway and academic support programs for underrepresented populations (i.e., Lemon Project, Bray School, Brafferton 2023, NPHC Garden)	Financial	Over 4 years	Development: CFR	Development
Optimize diversity in our recruitment and hiring process and share	1. Leverage our alumni identity groups to ensure	<ul style="list-style-type: none"> • Hiring committee represent diversity in their makeup 	1. FY23 2. FY23 3. FY24	UMark, Talent Engagement Team	TBD

<p>optimization plan with Advancement Staff</p>	<p>their constituents get the info</p> <ol style="list-style-type: none"> 2. Optimize recruitment marketing: <ol style="list-style-type: none"> a. Share job postings with identity group members and ask them to share b. Post jobs on websites that will reach a diverse population c. Quarterly recruitment marketing outreach to include intentional alumni identity groups 3. Ensure the makeup of the hiring committee reflects diversity 4. Provide regular training for supervisors and staff on bias in hiring and decision making and the role of professional networks in recruitment and hiring 5. Provide regular training for supervisors and staff on the relationship between a diverse team and business success 	<ul style="list-style-type: none"> • Increased applications for open positions from diverse candidates • Increased diversity in talent pipeline • Increased diversity in semifinalist and finalist candidate pools • Increased diversity in hired finalists 	<ol style="list-style-type: none"> 4. FY23 5. FY23 6. FY25 7. FY25 		
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	<p>6. Recognize Advancement staff for their work to advance diversity, inclusion and belonging priorities. Create annual Advancement Diversity Champion Award recognition process and celebration that will highlight innovation and effort in support of diversity, inclusion and belonging priorities.</p> <p>7. Intentionally communicate all recruitment and hiring practices internally</p>				
<p>Enhance engagement to enhance fundraising efforts with underrepresented alumni</p>	<p>Build structure that brings together high level and high-capacity donors to advise.</p>	<ol style="list-style-type: none"> 1. Group is convened 2. Outcomes are determined implemented. 3. Goals set by group are achieved 4. Philanthropy from underrepresented alumni is representative 	<p>FY27</p>	<p>Development and Alumni Engagement Inclusion Initiatives team</p>	<p>N/A</p>
	<p>Establish a D&I Giving Society.</p>	<ol style="list-style-type: none"> 1. Determination of Go/no go 	<p>FY23 to assess/FY24 implement</p>	<p>Alumni Engagement, Inclusion</p>	<p>OUA/Foundation</p>

	<ol style="list-style-type: none"> 1. Assess D&I giving society viability 2. Appoint staff to lead 3. If viable, implement 	2. Implementation		Initiatives, Stewardship, Development,	
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5. Innovation, Community and Reconciliation					
<i>2022-2026: Grow institutional philanthropy and community partnerships to improve outcomes in local/regional communities</i>					
SMART Goals	Actions	Outcomes (Data/Metric)	Timeframe(s)	Responsible Office/Position	Funding/Resource Allocation
Create a campaign strategy related to funds that support university-wide DE&I efforts	Peer-institution research to explore fundraising models (i.e., giving societies)	Campaign Goal	Over 4 years	Development	AVP, Development
Identify alumni, parents & friends from diverse constituencies in campaign planning (i.e., feasibility and steering committee)	Increase diversity participation reflective of the global W&M community	Strategic recruitment of committee members	Over 4 years	Development	AVP, Development
Identify and partner with DE&I champions across campus on donor visits, proposals and stewardship	Increase participation of DE&I champions in building and maintaining donor relationship for philanthropic support	Enhanced number and quality of relationships and commitment across the university for supporting DE&I advancement	Over 4 years	Development SO&AG: Advancement Services: ED Office; Development, frontline; Alumni Engagement inclusion Initiatives	AVP, Development

	<p>Highlight W&M DEI Champions in the Magazine, volunteer roles, as spokespeople.</p> <p>Identify DEI champions (academic leaders, faculty, students) and engage them in supporting DEI fundraising efforts (through proposals, donor visits, alumni events)</p>				
Provide educational opportunities for gift officers on DE&I initiatives	Quarterly briefings on DE&I giving opportunities through Frontline and regional team meetings	Increased number of donor conversations re: DE&I giving opportunities	Over 4 years	Development	AVP, Development
Support the university's Naming and Renaming Committee and initiate proactive research for ORS database of named buildings on campus	Catalog recent renaming of campus buildings and other areas and create a resource library to document historical trends as they maintain donor compliance.	A campus that promotes inclusivity and welcome to not only to the W&M community, but also to our immediate neighbors and those who visit our campus by serious contemplation of names and placement of buildings, statues, and other gathering places.	Ongoing	Development: ORS, Naming & Renaming Committee, Advancement, Buildings & Grounds, Design Review Board, other units as applicable.	TBD
Work with Prospect Development to identify Principal Gift donors who are passionate about DE&I initiatives	Identify list of 5 PG donors who might be a good fit for the DE&I initiatives that are identified as campaign priorities	5 donors identified	Annually	Development: Prospect Development and Principal Gifts	N/A

<p>Promote inclusivity in W&M publications</p>	<ol style="list-style-type: none"> 1. Produce point/counterpoint discussions around difficult topics 2. Create advertorials around DEI focused fundraising efforts 3. Conduct regular audit of publications to ensure broad diversity 	<ul style="list-style-type: none"> • Next survey will reflect that all alumni feel that they see themselves in advancement communications 	<ol style="list-style-type: none"> 1. FY23 2. FY23/24 3. FY24/25 	<p>UMark</p>	<p>TBD</p>
<p>Increase understanding of the presence of local Tribes and HBCUs and their connection to W&M and Williamsburg to build a commitment to strengthening partnership with Virginia tribes and HBCUs for the purpose of establishing, or making more productive and demonstrable outcomes in areas consistent with any ambitions shared with the university</p>	<p>Proactively reach out to local HBCUs and tribal leaders to develop internships to enhance the pipeline of talent into the industry</p>	<p>Professional Connections between W&M and Tribal Leaders and local HBCUs; networking. Provide fuel for curiosity, service, belonging.</p>			
	<p>1 annual HBCU event, internship program for students interested in advancement (HBCUs from VA and MD, for example Hampton U, Virginia Union, Virginia State, Norfolk State and more.)</p>	<p>Professional Connections between W&M and local HBCUs; networking. Provide fuel for curiosity, service, belonging.</p>	<p>FY24</p>	<p>SO&AG: Talent Team</p>	<p>TBD</p>
	<p>Fellows program for professionals at HBCUs. Trade W&M professionals to go work there for a week.</p>	<p>Professional Connections between W&M and local HBCUs; networking. Provide fuel for curiosity, service, belonging.</p>	<p>FY24</p>	<p>SO&AG:</p>	<p>TBD</p>
	<p>Invite colleagues from local HBCUs to attend and present at</p>	<p>Staff exposure and awareness of relevant</p>	<p>FY23, FY24</p>	<p>SO&AG:</p>	<p>TBD</p>

	our 2023 Professional Development Day	cultural issues within higher ed and Central VA. Professional Connections between W&M and local HBCUs; networking. Provide fuel for curiosity, service, belonging.		Talent Team, AVP SO&AG, SO&AG leaders	
	Identify W&M connections with Tribal Leaders to engage. For example, engage Jim Thomas, local Williamsburg resident, member of Cherokee Tribe. Outreach for collaboration.	Increased connections with Tribal Leaders	FY24	SO&AG:	TBD
	Use Give Campus to expand community engagement. Working with Class, Greek, Class Reporters and Athletics and Washington Center.	Increased volume of outreach year over year	Ongoing	SO&AG: Annual Giving team, Affinity & Reunion Annual Giving,	TBD
	Impact week	Measure of outreach year over year			
Build on the success of OTOD (One Tribe One Day) 2020 to develop fundraising efforts dedicated to advancing DEI initiatives	Growth Goals year over year	Increased participation, year over year	Ongoing	SO&AG	TBD
	Update giving page(s) related to diversity initiatives to optimize fundraising potential https://giving.wm.edu/where-to-give/university-initiatives/diversity-inclusion/index.php	<ul style="list-style-type: none"> Measure visits to diversity fundraising web pages over time Increased gifts to diversity efforts 		UMark, SO&AG	TBD
	Create WREN dashboard to track funds raised and donor	Ability to track tangible progress in DEI fundraising	Dashboard created by	Dashboard created by CYE	Assign Data Analytics staff

<ul style="list-style-type: none"> • Center for Student Diversity, ongoing annual • Scholarships Impact Fund • NPHC Greek plot 	<p>counts by FY for DEI funds that support inclusive excellence priorities</p>		<p>CYE 2022; use ongoing through 2026</p>	<p>2022; use ongoing through 2026</p>	<p>member to report/dashboard development</p>
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