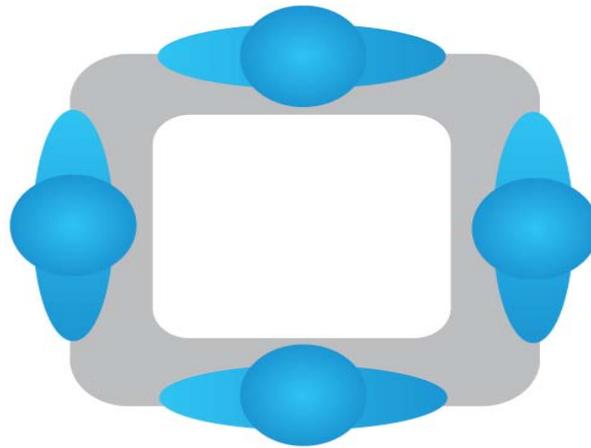


Inclusion Fosters Excellence

Recommendations for Implementing Inclusive Excellence
at the University of Wisconsin Colleges and University of Wisconsin-Extension

Full Report



Submitted by the Cross-Institutional Task Force on Inclusive Excellence

December 2011



Introduction to Inclusive Excellence

Inclusive Excellence is a term and approach developed by the American Association of Colleges and Universities (AAC&U) in response to the role of higher education institutions in a pluralistic democracy, and in an intercultural and global world. (AAC&U's brief description of Inclusive Excellence can be found in Appendix E.)

The University of Wisconsin System and its Board of Regents adopted *Inclusive Excellence* as a priority in 2008, at the sunset of its previous diversity plan, *Plan 2008*. The central premise of Inclusive Excellence (IE) holds that UW System colleges and universities need to intentionally integrate their diversity efforts into the core aspects of their institutions—such as their academic priorities, leadership, quality improvement initiatives, decision-making, day-to-day operations, and organizational cultures—in order to maximize their success. In other words, IE takes a more comprehensive approach in defining and implementing diversity and inclusion. Rather than being the initiative of one office, IE is integrated throughout the institution and is the responsibility of all units and individuals. Underpinning the idea of IE is the need for deep and comprehensive cultural change within an organization, and the gaining of individual skills, knowledge, and mindset needed for this transformation.

At the system level, all UW institutions and chancellors are responsible for implementing IE and providing updates to the Board of Regents. IE is coordinated by UW System's Office of Academic Affairs.

Definition of Inclusive Excellence

The following definition has been developed to fit the context of UW Colleges and UW-Extension:

Inclusive Excellence is the intentional engagement of the broadest range of perspectives, backgrounds, needs, experiences, and circumstances in order to maximize the success of the institution's mission.

Background on the Cross-Institutional IE Task Force

In January 2011, in collaboration with UW Colleges Vice Chancellor Greg Lampe, UW Colleges Associate Vice Chancellor Lisa Seale, UW-Extension Assistant Vice Chancellor Greg Hutchins, Chief Diversity Officer Stephan Gilchrist, and former UW-Extension Vice Chancellor Christine Quinn, the Cross-Institutional Task Force on Inclusive Excellence was created with the responsibility of developing a guiding framework and set of recommendations for implementing Inclusive Excellence. The official charge was:

1. Identify current Inclusive Excellence efforts in UW Colleges and UW-Extension.
2. Create a shared framework to advance intra-institutional and cross-institutional IE efforts (i.e. planning, implementation, assessment).
3. Outline a process to advance IE work including opportunities for centralized, decentralized, and cross-institutional support of IE (e.g. quick wins, long-term integration, shared meaning and definitions, communication, professional

development, planning, implementation, accountability, assessment, shared responsibilities, shared launch activities).

4. Use an inclusive approach to gather feedback from constituents.
5. Communicate and make decisions within the task force in an inclusive manner.
6. Draft a report of recommendations to be submitted to the chancellor, chancellor's Executive Team, deans and directors, campus executive officers, and be communicated and made available to everyone at UW-Extension and UW Colleges.

Members of the task force were selected based on their position and the institutions they serve. The roles of members were threefold: (1) to be a liaison between the task force and the institutions/units they represent; (2) to coordinate feedback efforts with their institutions/units; (3) to develop a guiding framework and set of recommendations based on feedback. The task force was brought together in February 2011 to begin its work.

Members included four participants from UW Colleges and four from UW-Extension—one from each division and one from Extension Conference Centers. In conversations with Division of Entrepreneurship and Economic Development (DEED), due to its small size, it was determined that Stephan Gilchrist would work as their liaison. Members are:

- Katie Christenson, Coordinator of Student Services at Continuing Education, Online, and E-Learning (CEOEL)
- Stephan Gilchrist, Chief Diversity Officer, Office of Inclusion
- Annette Hackbarth-Onson, Assistant Director of Student Services at UW-Marathon County
- Patrick Hagen, CEO/Dean at UW-Richland
- JoAnn Hinz, Assistant to the Dean and Director at Cooperative Extension
- Richard Krupnow, Senior Lecturer of English at UW-Fox Valley
- Sarah Jacobs, Audience Services Manager at Broadcast and Media Innovations (BAMI)
- Amy Reddinger, Associate Professor of English at UW-Marinette
- Tom Streich, Supervisor at Extension Conference Centers

JoAnn Hinz and Richard Krupnow serve as co-chairs of the task force. Stephan Gilchrist serves as facilitator.

The feedback process for each institution and division varied according to its culture and organizational structure. For UW Colleges the task force gathered feedback through campus collegia, the spring Colloquium, and June deans retreat. BAMI solicited input from its directors and managers. DEED provided feedback at an all-staff meeting. Conference Centers received feedback from its director. Cooperative Extension gathered ideas from its Academic Leadership Standing Committee, Cooperative Extension Administrative Committee, Civil Rights Leadership Team, and colleagues of Program Development and Evaluation. CEOEL received input from all departments. Contributions were also gathered from the Chancellor's Executive Team, the staff at the Office of Inclusion, and the chancellor.

Purpose of Developing a Guiding Framework and Recommendations

A guiding framework provides UW Colleges and UW-Extension: (1) a shared understanding, vision, and goals; (2) a flexible, strategic, and comprehensive path toward Inclusive Excellence. It helps delineate individual and unit responsibilities, and connects the goals of Inclusive Excellence to the accountability systems for strategic and operational planning at all levels of the two institutions. The recommendations further provide the processes necessary for communication and collaboration across campuses, across divisions, and throughout UW-Extension and UW Colleges. The framework helps UW Colleges and UW-Extension answer five fundamental questions:

- 1) Why is Inclusive Excellence important for UW-Extension and UW Colleges?
- 2) Where do we want to go? What is our vision? What are our goals?
- 3) Where are we now?
- 4) How do we get from where we are to our vision, to our goals?
- 5) How do we know when we've reached our vision and goals?

Themes Generated from the Cross-Institutional Feedback Process

The themes that emerged below were used to make changes to the initial framework and develop the set of recommendations on the following page.

- Educate colleagues, institutional partners and other stakeholders about the meaning and implications of fostering excellence through inclusion as fundamental for the success and sustainability of the University of Wisconsin Colleges and the University of Wisconsin-Extension in the 21st century.
- Provide a general framework that provides flexibility to both institutions and units while providing enough structure for guidance and direction.
- Develop both a graphic and narrative of the framework.
- Provide a simple yet comprehensive framework that does not overwhelm people with information.
- Have a graphic that looks less “bureaucratic.”
- Provide a shared definition, vision, and goals.
- The framework and recommendations need to acknowledge the good work being done already.
- The legal responsibilities of civil rights are an important aspect of Inclusive Excellence.
- It is important to identify broad indicators of success while allowing different indicators to be developed by each institution and unit.
- The descriptions of institutional dimensions (or goals) of Inclusive Excellence are comprehensive, and word tweaking is needed.
- Develop an accountability structure and process to implement the framework.

Recommendations

1. Adopt the IE guiding framework and goals (Appendix A), and set of recommendations laid out in this report by UW Colleges campuses, UW-Extension divisions, and central offices.
2. Have the institutions identify measurable outcomes and articulate behaviors and practices (see Appendix C as a foundation for this work).
3. If one does not exist already, each UW-Extension division, UW Colleges campus, and the Extension Conference Centers creates by March 31, 2012, a team/committee or integrates IE into an already existing team/committee to help coordinate and facilitate the work needed to plan, implement, assess, and communicate IE efforts. It is important that these groups reflect diverse perspectives represented in the division or on a campus. This includes the perspectives of classified staff, faculty, academic staff, and senior administrators. (Due to DEED's small size, it may be difficult to create an action team. One or two individuals could be asked to play a similar role.)
4. UW Colleges Senate Inclusive Excellence Committee works closely with campus IE teams/committees.
5. Create separate UW-Extension and UW Colleges Inclusive Excellence advisory and implementation teams. UW-Extension team includes representatives from each UW-Extension division. The UW Colleges team includes representatives from Senate Inclusive Excellence Committee and each of the thirteen campuses.
6. Each institution, division, campus, and smaller units use the guiding framework as a tool to identify Inclusive Excellence goals, and develop and implement strategic, operational and assessment plans at the local level.
7. Integrate accountability for implementing plans and achieving Inclusive Excellence goals into the planning process being developed by the chancellor's office.
8. Divisions, campuses, central offices, and departments prioritize and support the allocation of resources to support the work of IE.
9. Senior administrators support the professional development of classified staff, faculty, and academic staff around IE issues.
10. The Office of Inclusion develops an interactive website for the framework.

Role of Office of Inclusion

The Office of Inclusion helps facilitate planning, implementation, assessment, and communication of Inclusive Excellence throughout UW Colleges and UW-Extension. The office convenes and facilitates the Colleges-wide and Extension-wide IE groups identified in the *Recommendations* section of this report. Through its work with UW Colleges IE groups, UW-Extension IE groups, and in collaboration with deans, directors, other administrators, classified staff, academic staff, faculty, and students, the Office of Inclusion will:

- Create intentional opportunities and communication system to share effective practices and programs, and address local and institution wide needs.
- Develop an internal continuing education and professional development program that provides the skills, knowledge, and mindset necessary to achieve the IE goals of UW-Extension and UW Colleges.

- Provide consulting on accessibility issues.
- Provide consulting and investigation of unlawful discrimination and harassment.

Role of Teams and Committees Facilitating Inclusive Excellence

IE teams and committees at the campus and division level can serve as facilitator, coordinator, and as resources for division deans and directors, campus CEO/deans, other administrators, classified staff, academic staff, and faculty. Using the guiding framework, the groups work closely with division deans and directors, and campus CEO/deans and coordinate efforts to identify strategic priorities for Inclusive Excellence, implement initiatives and programs, and create an assessment process. **Accountability for achieving IE goals rests with the division dean and director, campus CEO/dean, and provosts—NOT with campus and divisional groups helping coordinate and facilitate IE.**

Role of Cross-Institutional Advisory and Communication Group

Upon its creation, the cross-institutional advisory and communication group will meet quarterly as a structured way for campuses, divisions, and the Office of Inclusion to exchange information with one another and address local and institutional needs. This helps facilitate the ongoing understanding of issues facing campuses and divisions, allows for the sharing of effective practices, the development of innovative approaches and programs, and collaboration to strengthen existing or new initiatives. Further, having a network of Inclusive Excellence teams/committees across UW Colleges and UW-Extension allows for continued communication of relevant events, articles, and other important information. The network also creates a learning community where teams and committees, and the Office of Inclusion can provide insight and support, and strengthen each other's work.

Note

Special thanks to Mimi Broeske, Senior Editor at University of Wisconsin-Madison's Nutrient Pest Management Program. She helped turn the original bureaucratic graphic into one that is informative, engaging, and aesthetically pleasing.

Appendix A: Guiding Framework Graphic

An accessible version of the [Inclusive Excellence framework](#) is available online at the Office of Inclusion website.

The graphic is a vertical rectangle with a grey border. At the top, the title 'Inclusive Excellence' is written in a large, bold, grey sans-serif font. Below the title, a white rounded rectangle contains the text: 'Intentionally engaging the broadest range of perspectives, experiences, needs and circumstances to best achieve our institutions' missions'. This is followed by three bullet points: 'Strengthens the institution's long-term viability', 'Lays the foundation for the Wisconsin Idea and a strong, pluralistic democracy', and 'Provides the skills and knowledge required by organizations and communities to live and work effectively in an intercultural, global world'. The middle section features a large yellow circle with the text 'Inclusive Excellence Goals' written vertically on its left side. Inside the circle, there are six categories of goals, each with a list of bullet points: 'LEADERSHIP AND GOVERNANCE' (Plan, implement, assess, make decisions and communicate effectively...), 'CIVIL RIGHTS, AFFIRMATIVE ACTION AND EQUAL OPPORTUNITY' (Be aware of and fulfill the institution's legal responsibilities...), 'RECRUITMENT, RETENTION AND SUCCESS' (Recruit diverse staff, students, faculty, volunteers, clients, audiences, and board members...), 'CLIMATE' (Individuals and groups feel valued and are able to learn and work at their full potential...), 'CURRICULUM, CO-CURRICULUM, PROGRAMMING, AND PEDAGOGY' (Incorporate diverse perspectives in the development and implementation of educational offerings...), and 'SCHOLARSHIP & RESEARCH' (Understand and integrate multiple perspectives and experiences into topics, methods, and processes...). The bottom section is an orange rounded rectangle with the title 'Gauging Your Inclusive Excellence' in a bold, grey font. Below the title are five bullet points: 'In what ways is inclusion important to your work?', 'What are your priorities and goals relative to inclusion for the next year, three years?', 'What are you currently doing to reach these goals?', 'What is further needed to help you reach your goals?', and 'How do you know when you've achieved your goals?'. The background of the graphic is decorated with various colored circles and dots in shades of green, blue, and orange.

CREATED BY UNIVERSITY OF WISCONSIN-EXTENSION AND UNIVERSITY OF WISCONSIN COLLEGES, 2011

Appendix B: Five Guiding Questions for Inclusive Excellence

As UW Colleges and UW-Extension continue our work on Inclusive Excellence, the guiding framework helps us answer the following five questions in a comprehensive, interconnected and strategic way, and helps guide our work:

- 1. What is Inclusive Excellence?**
 - What does it look like?
 - What are we trying to accomplish?
 - What are our goals?

- 2. Why is Inclusive Excellence important?**
 - Why should we pursue Inclusive Excellence?
 - Why is it important to my work, to the work of my unit, campus, and/or division?

- 3. Where are we now in relation to our goals?**
 - What programs and initiatives do we have in place?
 - What data and information do we have?

- 4. How do we reach our goals?**
 - What are our priorities?
 - What strategies do we use?
 - What programs and initiatives do we need?
 - What structures and processes are needed?
 - What resources (human and financial) do we need?
 - Who is responsible?

- 5. How do we know when we've reached our goals?**
 - How do we know when we are successful?
 - How is it assessed?
 - How is it measured?

Appendix C: Sample Effective Practices and Assessment Tools for Inclusive Excellence

LEADERSHIP & GOVERNANCE

Effective Practices

- Transparent structures & processes
- Communicated and shared expectations and accountability
- Shared understanding of decision-making processes
- Collaborative decision-making processes
- Dialogue and deliberation during meetings
- Regular and open communication
- Assessment and accountability systems in place
- Long-term plans and short term actions in place
- Coherences between goals, actions, and funding
- Support of professional development via equitable funding and time allocation

Assessment Tools

- Climate survey

RECRUITMENT, RETENTION & SUCCESS OF COLLEAGUES AND LEARNERS

Effective Practices

- Culturally competent advising for students
- Intergroup dialogue programs and training for students, staff, faculty, and administration
- Mentoring, coaching and support systems are established and monitored to help assure the success of all colleagues
- Search committee members have gone through a workshop to understand effective approaches to searches and related legal responsibilities
- Broad implementation of high-impact learning practices

Assessment Tools

- Diverse classified staff, academic staff, student body, faculty, clientele, and audience (e.g. geography, gender, sexual identity, ethnic, racial, age, ability, culture, socio-economic class, veteran status)
- Graduation rates of all students, including first-generation students, adult students, veterans, and underrepresented groups
- Retention rates of all students including first-generation students, adult students, veterans, and underrepresented groups
- Equity Scorecard
- Affirmative action plan

CLIMATE

Effective Practices

- Constructive interpersonal and intergroup relationships, processes, and structures including informal and formal conflict resolution processes
- Restorative justice processes for students
- Education and professional development related to creating a respectful workplace
- Education and professional development on intercultural communication

- Education and professional development on conflict resolution
- Education and professional development on dialogue and deliberation
- Education and professional development on systems thinking and design
- Education and professional development on transforming social structures of oppression e.g., ageism, classism, ethnocentrism, gender oppression, nationalism, disability oppression, racism, religious oppression, sexism, heterosexism, etc., into more inclusive and equitable systems
- Intergroup dialogue programs for students, staff, faculty, and administration

Assessment Tools

- Climate study
- Number of harassment, discrimination, and retaliation complaints
- Employee turnover rate

COMMUNITY ENGAGEMENT

Effective Practices

- Intentional reaching out to groups who have been traditionally underrepresented
- Diverse volunteers who are recruited from all communities who are engaged with and supportive of our institutions.
- Diversity of organizational partnerships and intentional reaching out to organizations that include potential learners and underrepresented students
- Attendance at community events through intentional expansion of community relationships among underserved groups
- Diverse students, program participants and other learners attracted through special recruitment and special outreach efforts
- Diverse representation on institutional boards and advisory groups

Assessment Tools

- Event and program assessment
- Civil rights review (Cooperative Extension)

SCHOLARSHIP

Effective Practices

- Engaging multiple perspectives in the research process
- Cross-cultural collaboration(e.g., among scholars, communities, and countries)
- Connecting issues of Inclusive Excellence at the local, national, and global levels
- Interdisciplinary approach
- Comparative research and scholarship related to diversity and inclusion
- Action, participatory research projects
- Community-based research projects
- Culturally appropriate design, development and implementation
- Valued and rewarded in the promotion and tenure process

Assessment Tools

- Number and type of projects and dissemination

CURRICULUM, CO-CURRICULUM, PROGRAMMING AND PEDAGOGY

Effective Practices

- Engage diverse perspectives and facilitate inclusive and intercultural learning
- Culturally appropriate educational design, development and implementation
- Use of dialogue and deliberation in educational settings
- Integration of universal design in teaching and educational programs
- Courses and programs related to:
 - global issues
 - intercultural issues
 - democracy and civic engagement
 - inclusive organizational and social systems
- Broad integration of high-impact learning practices

Assessment Tools

- Number of high-impact learning practices
- Diversity of students and clients in a course or program
- Pass/failure rates of students in courses
- Student learning objectives related to intercultural and civic knowledge and skills (national and global dimensions)

CIVIL RIGHTS, AFFIRMATIVE ACTION, AND EQUAL OPPORTUNITY EMPLOYMENT

Effective Practices

- Effective affirmative action plan
- Effective and routine education of all colleagues about the responsibilities of administrators, supervisors, colleagues, students and all learners associated with both institutions
- Effective facilitation of accommodation requests to assure equal meaningful access to education
- Clear policies and procedures

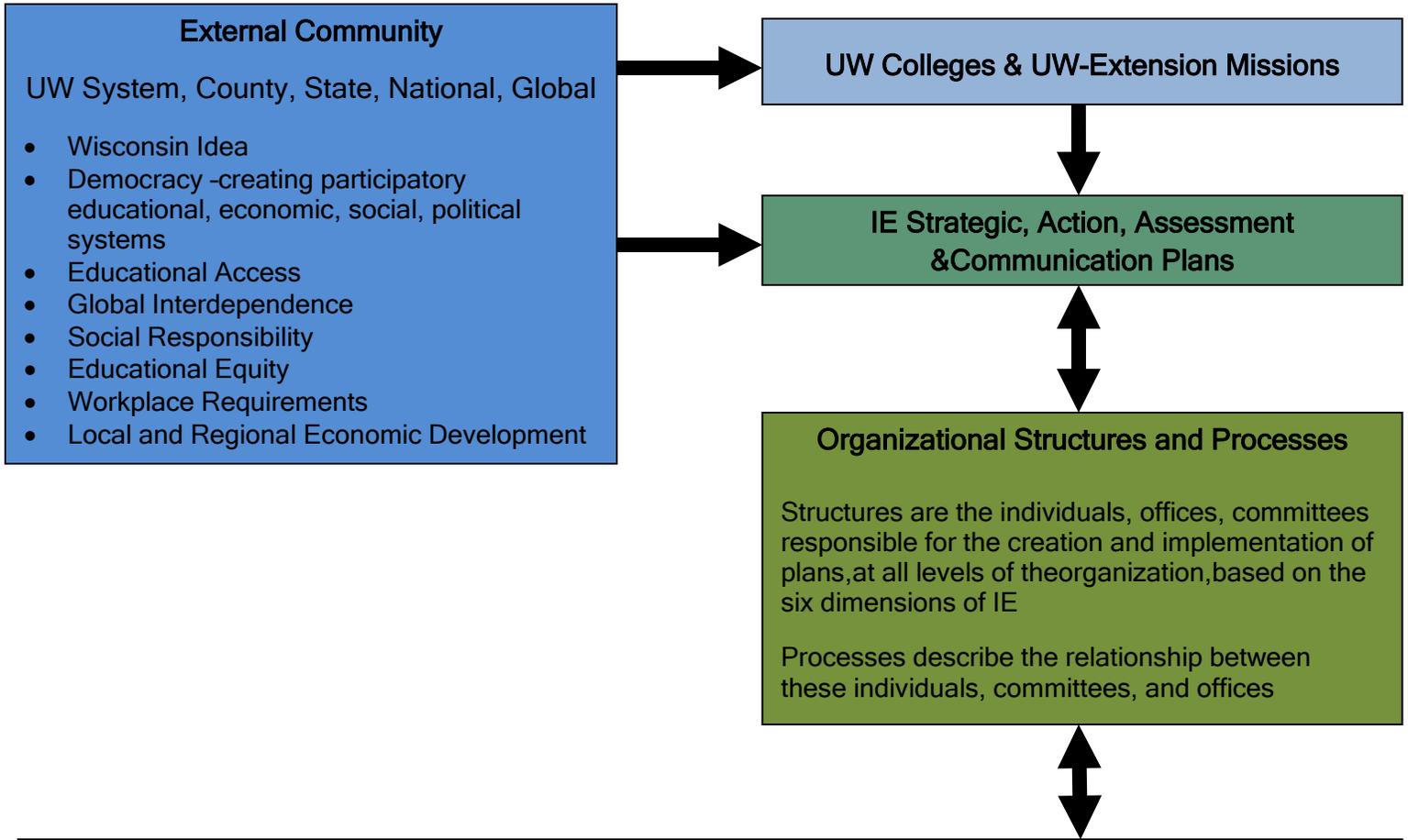
Assessment Tools

- Regular reporting against the goals in the affirmative action plan that demonstrates progress
- Number of harassment, discrimination, and retaliation complaints

Appendix D: Previous Framework

This draft framework, dated October 6, 2010, was used at the beginning of the process to receive feedback from colleagues at UW-Extension and UW Colleges. It is placed in this report to contrast the difference between the initial framework and the final version in Appendix A.

DRAFT Guiding Framework (5-5-11)



Institutional Dimensions of Inclusive Excellence		
<p>Governance & Administration</p> <p><i>To foster clear, inclusive, and transparent administrative and governance systems.</i></p> <ul style="list-style-type: none"> ▪ Transparent structures & processes ▪ Collaborative decision making ▪ Dialogue & deliberation ▪ Regular and open communication 	<p>Recruitment & Success</p> <p><i>To recruit a diverse staff, student body, faculty, and governing board, and support their success.</i></p> <ul style="list-style-type: none"> ▪ International ▪ Under-represented groups ▪ Community partnerships ▪ Inclusive search processes ▪ Advising ▪ Mentoring 	<p>Climate</p> <p><i>To foster an inclusive climate that promotes constructive interpersonal and intergroup relationships, processes, and structures.</i></p> <ul style="list-style-type: none"> ▪ Conflict resolution ▪ Dialogue & deliberation ▪ Nonviolent communication ▪ Collaborative decision making ▪ Restorative justice
<p>Community Engagement</p> <p><i>To reach all communities served by the mission of the institution.</i></p> <ul style="list-style-type: none"> • Geographic location • Age • Gender • Race/Ethnicity/Religion • Socio-Economic class • Sexual Orientation 	<p>Scholarship & Research</p> <p><i>To engage in inclusive research processes and issues related to inclusion.</i></p> <ul style="list-style-type: none"> ▪ Multiple perspectives ▪ Underrepresented populations ▪ Cross-cultural collaboration ▪ Action, participatory research ▪ Democratic/inclusive processes ▪ Community-based 	<p>Curriculum, Co-Curriculum & Pedagogy</p> <p><i>To engage diverse perspectives and facilitate inclusive and intercultural learning.</i></p> <ul style="list-style-type: none"> ▪ Learning styles (e.g. universal design) ▪ Course content ▪ Courses & programs ▪ High impact practices (e.g. study abroad, service learning)

Appendix E: AAC&U Definition of Inclusive Excellence

Making Excellence Inclusive

Making Excellence Inclusive is AAC&U's guiding principle for access, student success, and high-quality learning. It is designed to help colleges and universities integrate diversity, equity, and educational quality efforts into their missions and institutional operations. Through the vision and practice of Inclusive Excellence, AAC&U calls for higher education to address diversity, inclusion, and equity as critical to the wellbeing of democratic culture. Making excellence inclusive is thus an active process through which colleges and universities achieve excellence in learning, teaching, student development, institutional functioning, and engagement in local and global communities.

A high-quality, practical liberal education should be the standard of excellence for all students. The action of making excellence inclusive requires that we uncover inequities in student success, identify effective educational practices, and build such practices organically for sustained institutional change.

Diversity, Inclusion, and Equity: Core Principles

AAC&U endeavors to develop "equity-minded practitioners," who are willing to engage in the necessary, and sometimes difficult, conversations and decision-making that can lead to transformational change for student learning and achievement.

Diversity: Individual differences (e.g., personality, learning styles, and life experiences) and group/social differences (e.g., race/ethnicity, class, gender, sexual orientation, country of origin, and ability as well as cultural, political, religious, or other affiliations).

Inclusion: The active, intentional, and ongoing engagement with diversity—in the curriculum, in the co-curriculum, and in communities (intellectual, social, cultural, geographical) with which individuals might connect—in ways that increase awareness, content knowledge, cognitive sophistication, and empathic understanding of the complex ways individuals interact within systems and institutions.

Equity: The creation of opportunities for historically underrepresented populations to have equal access to and participate in educational programs that are capable of closing the achievement gaps in student success and completion.

Equity-mindedness: A demonstrated awareness of and willingness to address equity issues among institutional leaders and staff (Center for Urban Education, University of Southern California).

(From http://www.aacu.org/compass/inclusive_excellence.cfm)