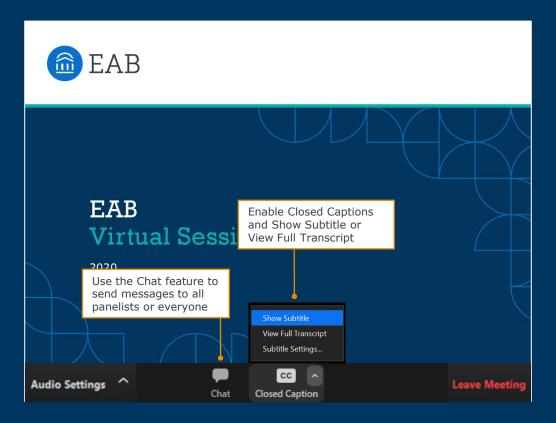




Spotlighting Pitfalls to Avoid in Institutional DEIJ Plan Design and Writing

We will begin at 12:02 p.m. Eastern Time once everyone has joined!



## Meet the Research Team



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## This Time, Something's Different

A Year of Devastation Creates Compounding Crises



15-26M

People in the U.S. participated in **Black Lives Matter demonstrations** over the murder of George Floyd<sup>1</sup>



150%

Increase in **anti-Asian hate crimes** between 2019 and 2020<sup>2</sup>



82

**Anti-trans bills** introduced in the 2021 state legislative session<sup>3</sup>



27%

Of households with income of less than \$35,000 struggle to put food on the table due to economic impact of COVID-19



45%

Of December 2020 job losses comprised of Latinx women



41%

Of adults reported **symptoms of anxiety or depressive disorder** in January 2021

- 1) In June 2020 alone
- Increase from 49 in 2019 to 122 in 2020
- As of March 2021

Source: Kimmy Yam, "Anti-Asian hate crimes increased by nearly 150% in 2020, mostly in N.Y. and L.A., new report says.", NBC News, March 9, 2021; Larry Buchanan, Quoctrung Bui, and Jugal K. Patel, "Black Lives Matter May Be the largest Movement in U.S. History", New York Times, July 3, 2020; Wyatt Ronan, "BREAKING: 2021 Becomes Record Year For Anti-Transgender Legislation.", Human Rights Campaign, March 13, 2021; Ryan Zamarripa and Lorena Roque, "Latinos Face Disproportionate Health and Economic Impacts From COVID-19", March 5, 2021; Brian Root and Lena Simet, "United States: Pandemic Impact on People in Poverty", Human Rights Watch, March 2, 2021; Nirmita Panchal, Rabah Kamal, Cynthia Cox, and Rachel Garfield, "The implications of COVID-19 for Mental Health and Substance Use", Kaiser Family Foundation", February 10, 2021.

## **Escalating Student Activism**



## K-12 Students Participate in Nation-Wide Protests at Unprecedented Levels

2018: March For Our Lives Protest

Participants marched for gun control in the student-led movement March For Our Lives

2019: Global Climate Strike For Future

Activists participated in school **The strikes across the world urging** action on climate change

2020: Summer of Racial Reckoning



High School Students and Alumni Are Using Social Media to Expose Racism



Young Activists Find Their Voice Organizing Protests for Racial Justice

Flashpoints of Student Activism in Recent Years

Protests against Dakota Access Pipeline and its impact on the Standing Rock Sioux tribe between 2019 and 2020

Stop Asian Hate rallies in response to the increase of anti-Asian hate crimes

Millions participate in **Black Lives Matter** demonstrations over the murder of George Floyd

**Black Trans Lives Matter** rally in NYC after attacks on Black trans and gender non-conforming people

## Younger Generations Demand Change





#### **Millennials**

Desire more uncomfortable conversations about diversity and bias in the workplace



## Gene Expres

#### **Generation Z**

Express support and equality for Black Americans on social media with 88% in favor of BLM





#### **Generation Alpha**

Aware of current issues more than previous generations with a 50% non-white cohort

## Gen Z Demands Transparency and Accountability



Students expect more information and input on organizational decisions



Students demand more modes and opportunities for meaningful access to decision-makers



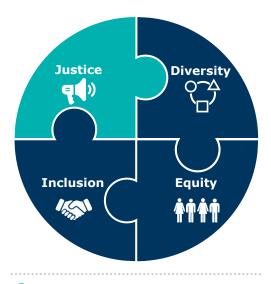
Students increasingly **call out inconsistencies** in district values and practices

Source: Davis, Dominic-Madori. "The Action Generation," Business Insider, June 10, 2020; Fry, R., Parker, K., "Post-Millennials on Track to be Most Diverse, Best-Educated Generation Yet," Pew Research Center, November 15, 2018; "Understanding Generation Alpha", Hotwire, 2018; Patrick, Camille, and Ella Washington. "3 Ways Millennials Can Advance Workplace Diversity and Inclusion," Gallup, November 30, 2018; EAB interviews and analysis.

## Multiple Factors Lead Schools to Create Institutional DEI Plans



### **Integrating Justice into Your Plan**



#### Justice

Systematic and proactive reinforcement of public policies, institutional practices, cultural messages, and social norms to achieve and sustain equity for all.

## **Ouick Poll**

## Choose the Response That Best Fits Your Institution



Where is your school in the planning process?

- Assessing Readiness
- Designing Early Plan
- Finalizing Plan
- Implementing Plan
- O Not Currently Engaged in DEIJ Plan Work

## The Research in Brief

## EAB's Institutional Plan Review Workstream

DEIJ Strategic and Action Plans

#### Key Components:

- Making the Case
- Plan Development
- Shared Language
- Goals
- Metrics
- Accountability
- Communication



## Sample of **Independent Schools** Served

- Georgetown Day School
   Windward School
- Noble and Greenough
   Hockaday School
- Latin School of Chicago
   University Prep



## Sample of K-12 Districts Served

- Iowa City Schools Lee's Summit R-7
- Forsyth County Schools
   Arlington Central
- Ann Arbor Public Schools Fairfax County

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- Setting a Generic and Unclear Scope
- 2 Creating Unworkable Aspirations and Actions
- 3 Using Ineffective Accountability Measures
- 4 Focusing Success Metrics on Outputs
- 5 Failing to Outline a Communications Plan
- 6 Leaving Questions around Funding Unaddressed





# Setting a Generic and Unclear Scope

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## Too Often, DEIJ Plans Sound the Same

#### Look Familiar?

Embracing diversity, equity, and inclusion is central to our mission as an institution. Demonstrating commitment allows us to strengthen and fulfill our academic and social missions. Diversity, equity, and inclusion initiatives lead to a more robust experience, allowing us to better serve our students as well as strengthen connections with our surrounding communities."

#### **Pain Points**



Generic Goals



No Institutional History or Context



Undefined Terms and Populations



Vague Language

**DEIJ Plans with vague or standard-issue language can contribute** to weakening non-white families' trust in K-12 schools.

#### Trust Gap Among Parents:

81% Of **white parents** believe all children receive an equal education

58% Of non-white parents believe all children receive an equal education

#### **Growing Black Distrust of K-12 Schools:**

THE NEW YORKER

The Rise of Black Homeschooling: Often underserved by traditional schools, Black families are banding together to educate their children

Missing in School Reopening Plans: Black Families' Trust

## Make Your (Unique) Case for DEII Progress

Schools Can Explicitly Defines Their Priority Populations

Cite mission and shared values around DEIJ

Link DEIJ progress with key institutional priorities

Define Terms Based on Your School's Context

Reflect on complicated school history

Acknowledge responsibility in shaping society



This plan explicitly states

underserved populations

of underrepresented

minorities and

their institutional definition

For the purposes of this plan, it's also important that the campus community understand the demographics in which the plan prioritizes.

#### **Underrepresented Minority** and Underserved Populations

**Underrepresented Minority** (Students):

- Native American/American Indian
- African American ☐ Hispanic/Latino
- Southeast Asian of Vietnamese, Cambodian, Hmong or Laotian descent who entered the U.S. after 12/31/1975
- □ Two or more races (either alone or as two or more race/ethnicities)

#### Other populations that fit within the scope of this plan:

- Women (faculty/staff)
- Non-traditional students
- People with a disability
- Low-income (Pell-eligible)
- People who identify as Lesbian, Gay,
- Bisexual, Transgender and other sexual identities (LGBTQ+) Veterans

University Prep Defines and Constructs Plans for Priority Populations



#### **Know Your Context**

Name the underrepresented student populations in your school environment (i.e., African American, Native American, & Hispanic)



## **Cultural Competency Training**

Implement implicit bias and cultural competency trainings for supervisors better engage students and faculty of color



## **Close Opportunity Gaps**

Create opportunities for underrepresented students to take advance level coursework in addition to monitoring their comfort in these classes





## Creating Unworkable Aspirations and Actions

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## The Goldilocks Dilemma

## Two Types of Goal-Setting Mistakes to Avoid in DEIJ Plans



### Approach 1: All Aspiration, No Substance

 Lofty goals with no sub-goals or tangible steps to achieve them

#### **→** Example:

"Support diversity and inclusion in and out of schools and foster a climate of equity for all stakeholders"

#### Challenges:

- Doesn't define the "who" or "how"
- Difficult to measure progress



### Approach 2: Checklists that Add Up to Nothing Greater

 A very detailed list of action items that misses the bigger picture

#### **→** Example:

116 critical tasks including:

- "Create inclusive school facilities webpage"
- "Establish key DEI success metrics regarding student recruitment and success"

#### Challenges:

- No sense of timeline or project owners
- Tasks span a variety of altitudes



## Problems with the Status Quo

- Ambitious goals with no roadmap will only set the institution up for failure and raise skepticism about the achievability of future DEIJ endeavors
- Plans that are primarily a checklist of actions raise questions about the institution's commitment to longterm change further exacerbating the trust gap

## Make Plans Achievable Through Clear Action Items

SMART Goals Inspire Commitment and Make It Easy to Evaluate Success













"During the 2020-21 school year, **faculty and staff participated in** a community book study and **regular DEI professional development** sessions...New faculty and staff engage in DEI onboarding training."



"Georgetown Day School **hired a third-party to audit policies, climate and curriculum** from a DEIJ lens. GDS is reviewing findings and recommendations to determine short- and long-term priorities."



"Menlo School **increase investments and contracts** with BIPOC owned and/or led companies and organizations by 5%."

## Applying the SMART Goals Framework

## EAB's Tool for Setting Actionable Goals

DEIJ strategic plan goals often lack clear definitions, implementation steps, and success metrics. EAB recommends that a planning task force consider the SMART goal framework when outlining district-wide goals. This tabletop exercise will help a planning task force better understand SMART goals and draft more accountable plans.

#### **Supporting Your Team With:**

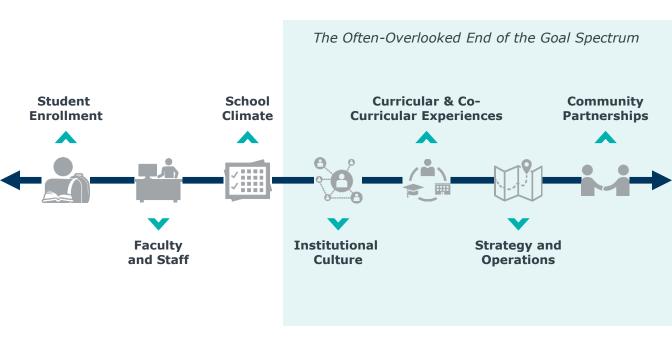
- Choosing a goal to pursue
- Identifying the current barriers to success
- Brainstorming SMART Goals to mitigate each barrier



- Assigning project owners
- Determining success measures

## Set Goals with a Holistic 360 Degree Perspective

Plans Often Omit Institutional Culture, Operations, and Local Community



## Incorporate Overlooked Elements into Goals



## Target Goals to Support Institution-Specific Historically Underserved Groups

"Develop pathways to encourage underrepresented students to take advanced level classes."



## Recognize the Institution's Broader Role in the Local Community

"Increase investments and contracts with BIPOC-owned and/or led companies and organizations by 5%."



## Incorporate a DEIJ Lens into Strategy and Operations at All Levels

"Select a consultant to work with the Board of Education...building/district leaders and staff to provide on-going professional learning and support the implementation of systemic equity work and decision-making protocols."





## Using Ineffective Accountability Measures

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## Typical Accountability Measures Fall Short

## Three Common, and Flawed, Project Ownership Models...



#### ...All Result in the Same Ineffective Action Cycle

Plan implementation begins, and "quick wins" executed

Task Force drafts plan in response to district and local community climate

Progress plateaus; minimal systemic change achieved, without intervention

Frustration around unmet promises grows; efforts repeated

## Balancing Ownership and Action



## Assigning Dual Project Owners Facilitates Collaboration and Shared Accountability



#### **Head of School**

Names a leader to ensure buy-in and signals that DEIJ work is a priority



#### **Director of DEI**

Establishes frontline commitment and helps to translate broad strategy school wide.



## Enhancing Your Accountability Measures

Specifically Name Cabinet Champions, Frontline Owners, and Collaborators

WINDWARD



· Windward's DivF In Committee is a leadership team that consists of faculty, staff, and parents assigned to divisions of diversity, equity inclusion & belonging.



#### Starting From the Top

LSR7

 In its Equity Plan, Lee's Summit R-7 School District holds executive-level leadership accountable while also delegating responsibility to different unit-level owners.



### **Facilitating Collaboration**

 Menlo's Chief of DEI collaborates with the Parent Association to administer a parent survey to identify demographics, inquiries, and strategies to boost engagement.





# Focusing Success Metrics on Outputs

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## Common Metrics in Plans Reveal Little About Impact

## Status Quo Approach Yields Indicators that Measure Output, not Outcome

Sample Output "Metrics"

- Progress reports published and distributed
- Meet monthly to discuss DEI issues and develop programs/services
- Webpage established and online

Elements of Outcomes Metrics



Connects to overarching goals rather than actions



Success defined as impact, structural, and/or behavioral changes



Provides information for new future programming

What Does an Outcomes-Focused Metric Look Like?

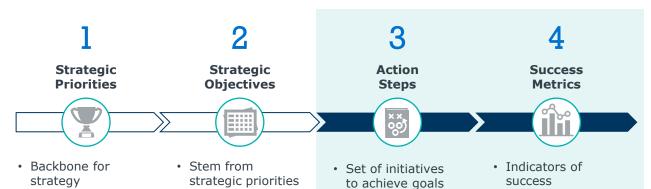




Change in AP enrollment rates for Black girls year-over-year

## Why Do So Many Schools Track Outputs?

Metrics Don't Measure Impact When they Flow from Actions



- Example
- Enhance Faculty and Staff Recruitment and Advancement

#### Example

 Invest in professional development opportunities for staff

#### Example

 Develop culturally responsive mentorship networks

#### Example

 Mentorship network formalized

## Link to Strategic Objectives

Confirm Metrics Relate Directly to Objectives Rather than Actions



#### **Metrics that Flow from Objectives Measure Progress on Strategic Goals**

Strategic Objective: Invest in professional development opportunities for staff



Old metric measured output, said little about impact of action



Time to promotion broken down by race and gender

New metric tracks progress toward strategic objectives and goals



**Outcomes-Focused Success Metrics** are metrics that indicate progress toward strategic and operational objectives. They might include:

- Volume indicators: raw numbers that provide information on volume or scale
- Relative indicators: calculations of multiple metrics that provide relative information
- Qualitative data: information from reports and surveys (e.g., school climate data)

## A Framework for Outcomes-Focused Metrics

## **Vetting Potential Metrics to Identify Outcomes-Focused Measures**

Strategic Goal	Sustain Investment in Recruiting, Developing and Advancing BIPOC Faculty and Staff			
Strategic Objective	Invest in the ongoing professional development of staff and faculty and create viable pathways for BIPOC to advance into tenure-track and leadership roles			
<b>√</b> =	Metrics =			
	Retention and advancement disparities			
	Time to tenure and promotion			
	Attrition rate by department/unit			
	Pay increases			
	Attitudes, behaviors, skills, and knowledge relating to DEIJare recognized and rewarded in performance reviews			
	Time to promotion			
	Total terminations (voluntary and non-voluntary)			
	Lateral and diagnonal career switches within the institution			
	Pipeline stage conversions (at what state do diverse candidates fall out?)			
	Time to tenure			
	Staff distribution by level			
	All members of search committees complete implicit bias training			
	Student credit hours per faculty FTE			
	Promotion criteria formalized and communicated			
	Holistic research outputs (e.g., mulitdisciplinary research, scholarship and teaching)			

Does this metric stem from the goal, and not an action to meet that goal?

Will we see change over time in this metric if the strategy is working?





## Failing to Outline a Communications Plan

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## Communication Is a Critical Component

#### Districts Underinvest in Communication After DEIJ Plan Launch

### **Culture of Transparency**

- Keeps schools and local community informed
- Builds trust with groups that have been previously disappointed by district efforts
- Provides consistent updates about district progress and implementation roadblocks



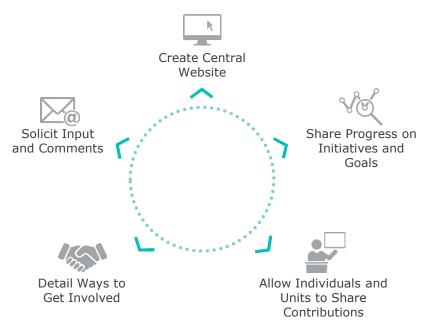
#### **Real-Time Course Correction**

- Accounts for reality that DEIJ work is a continuous improvement process
- Creates feedback loop to inform rollout and iteration
- Offers ways for students, teachers, administrators, and local community members to get involved in institutional DEIJ work

## Establish an Ongoing Communication Strategy

Keep the Community Involved in DEIJ Progress and Initiatives

## **Key Elements of DEIJ Plan Communication**



## Provide the Specifics on Initiative Progress

## Georgetown Day School's Detailed Progress Tracker



Updated April 7, 2021.

Ongoing Actions (4–12 months)

Immediate Actions (0-4 months)

Conduct Third Party Audit of Curriculum Program and Climate with Independent Consultant

Uses a drop-down menu to **share progress updates** on actions that have been taken to date to reach a goal.

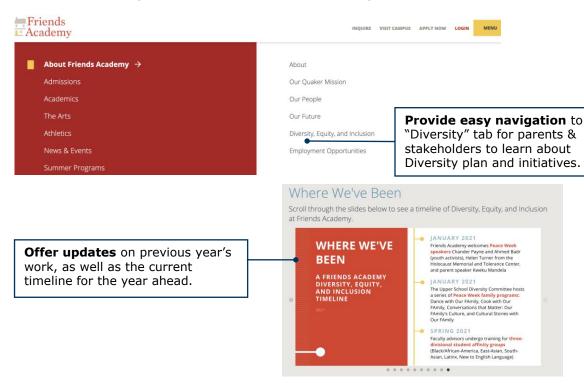
▼ Strengthen Recruitment, Hiring, Support, and Retention of Black Faculty and Staff

Action	Status		
Review and confirm participation of DEI office in applicant review, interview, and hiring process			Complete
Review hiring protocols to ensure culturally responsive recruitment and interview process		In Progress	
Initiate 1:1 peer mentor program with goal of increased retention		In Progress	
Continue work with compensation consultant related to ensuring equitable compensation practices		In Progress	
Complete analysis of current data (exit interviews, surveys, retention) and conduct annual reviews of data	Planning		

**Specifies the status of actions** that are in planning phase, in progress, or completed.

## Share Out DEIJ Progress and Milestones

## Friends Academy's Centralized Website for Updates



### Convene Stakeholders for DEIJ Reflections & Updates

#### Southern Oregon Education Service District Equity Summit





#### **Equity Summit**

- Provides strategies for understanding equity through a traumainformed approach
- · Features:
  - Notable keynote speakers for different equity focus areas
  - Topics like SEL,
     Gender Inclusivity, and
     Restorative Justice
  - Extensive book list for attendees

#### 2021 SOESD Equity Summit Agenda

- Native Equity Keynote
  - · Featuring Native Institute
- **Breakout Sessions**
- Lunch
  - Equity for LGBTQ+ Keynote
  - Featuring Guest Speaker
  - **Breakout Sessions**
- Networking
- Belonging Through Dignity Keynote
  - · Featuring Guest Speaker





# Leaving Questions Around Funding Unaddressed

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# The High Price of Structural Change

Immense Cost Pressure Imperils Needed Investments in DEIJ

#### **Transformation Takes Investment**

#### Removing Financial Barriers

- Student scholarships
- Student emergency aid



#### Re-envisioning Equitable Pedagogy

- Flipped-classroom renovations
- Bottleneck redesign releases



#### Diversifying Teacher Pipeline

- · Recruit/Retain teachers of color
- Culturally responsive trainings



#### Impacting Underserved Communities

- · Social innovation seed funding
- · Extension program growth



#### **But Few Plans Acknowledge this Reality**

50%

Of higher education statements following George Floyd's death did not mention any resources allocated to address anti-racism<sup>1</sup>

Getting Bold About
Fundraising For DEI Efforts

One independent school is intentionally increasing their fundraising goal for DEI efforts this year in order to support the leading role DEI programming will take for the community. Messaging this to the community will be tied to the mission and goals related to DEI. The school also has a separate tuition assistance fund to support access and equity for students.

 Based on EAB's review of 130 institutional statements on racial justice and anti-racism in the wake of George Floyd's murder.

# At the Intersection of Opportunity and Need

#### Funders Flocking to DEIJ Just in Time



Example(s): Independent Schools Addressing DEIJ Needs

- **Black/African-American Scholarship** 
  - One school's Black Alumni Council pushed leadership to launch an annual scholarship for students of the African diaspora.
- **Reevaluate Capital Campaign Committees**

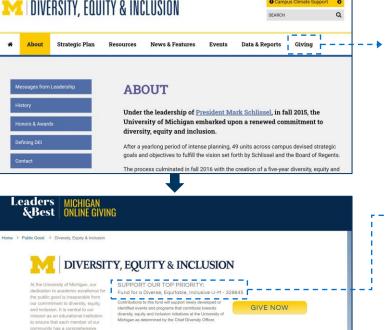
One school realized their capital campaign committee no longer reflected their institution. Instead of seeking big donors, the school became more inclusive onboarding members with different perspectives and dropped the requirement of donating to join the committee.

# Make It Easy to Give to Current DEIJ Efforts

O Campus Climate Support

Need Help? Chat With Us!

Embed Link to Giving Opportunities Across Related Websites



#### University of Michigan's Strategy



Giving tab is embedded visibly and accessibly throughout Michigan's central DEI website

Automatically redirects users to Michigan's DEI annual fund on its online giving platform

opportunity to thrive in our

# Seek Transformative Gifts for Ambitious DEIJ Goals

Independent School's "Big Ideas" Moment

#### What Makes for a "Big Idea" in Independent School Fundraising?



#### **Transformative Impact**

Tackling compelling societal problems using niche institutional strengths



#### **Multidisciplinary Breadth**

Putting the full weight of institutional expertise behind the *cross-campus idea* 



#### **Ultra-High Price Tag**

Fundraising at levels that allow for *large-scale*, rather than incremental, change

#### Strategy in Brief: Formulate 'Big Idea' Proposals Focused on DEIJ

 Advancement and academic leaders partner to identify transformational, multidisciplinary giving opportunities related to DEIJ

# Transformative Gifts Reshape Our Institutions

'Big Ideas' DEIJ Efforts Move the Needle on Pinnacle Challenges

#### Three Initiatives that Go Beyond Scholarships to Address Systemic Issues



#### **Building a Pipeline to College for African American Men**

Partnership with local schools to increase graduation rate for African American men starting in  $6^{\text{th}}$  grade

**\$6M** anticipated donations



#### **Recruiting Diverse Faculty**

Donation to recruit, retain, and enhance faculty diversity and increase student diversity

\$10M from Carl V. Granger



#### **Debt Forgiveness for HBCU Students and Family**

Abolished student debt, a primary barrier to long-term financial equity, for the Class of 2019

\$34M from Robert Smith

# "Big Ideas" Meets DEIJ Fundraising

Loyola University Sets Out to Identify and Fundraise for a Big DEIJ Idea



A two-week submission period gives colleagues time to generate DEIJ big ideas



Advancement works with donors to test big ideas and make a selection (forthcoming)

#### Potential Big Ideas at Loyola

- Increase access for local students (\$10M)
- Reduce student debt for all educational costs (\$25M)
- Fund supplemental learning opportunities for career readiness (\$25M)
- Endow the office of diversity (\$5M)

### Quick Poll

# Choose the Response That Best Fits Your Institution



Which of the six pitfalls is the biggest pain point for your school right now?

- Setting a Generic and Unclear Scope
- Creating Unworkable Aspirations and Actions
- Using Ineffective Accountability Measures
- Focusing Success Metrics on Outputs
- O Failing to Outline a Communications Plan
- Leaving Questions around Funding Unaddressed





# Charting a Path Forward

Next Steps in Your DEIJ Planning Process

EAB Resources Save Time and Support Your Team Throughout the Process

#### Spotlighting Pitfalls in Plan Design Webinar

Identify—and learn how to overcome the common pitfalls in DEIJ plan writing that detract from meaningful progress

# Institutional DEIJ Plan Starter Kit

Tools, templates, and examples to save time and improve decisions



#### Aligning Divisional Goals & Strategy Workshop

Unpack the process for cascading institutional goals and metrics to divisions and departments



# Institutional DEIJ Plan Review Service

EAB experts assess your draft and/or existing university DEIJ plan and provide researchbased advice and next steps



#### DEIJ Metrics Selection Workshop<sup>1</sup>

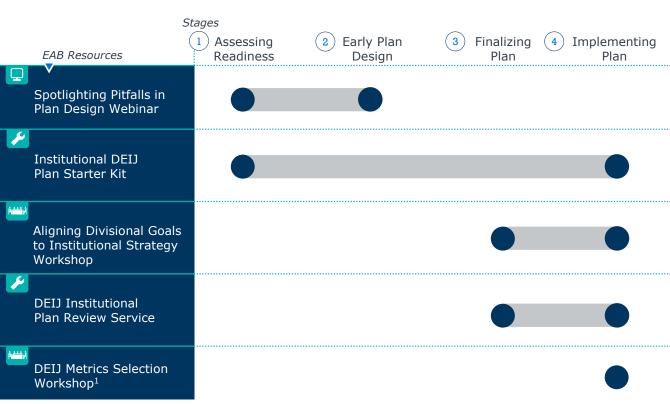
Learn how to avoid common metrics pitfalls and participate in activities to identify good success metrics facilitated by an EAB expert



Institutions must complete the plan review before participating in the metrics selection workshop.

# Introducing EAB's DEIJ Plan Design Lab





<sup>1)</sup> Institutions must complete the plan review before participating in the metrics selection workshop.

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### Final Thoughts

Please take a moment to answer this final poll question to provide your overall experience on today's session.

We have also shared a link to a short online evaluation in the **Chat** and we would appreciate if you could take 2-3 minutes to give us additional feedback on your experience today.



Washington DC | Richmond | Birmingham | Minneapolis | New York | Chicago  $202\text{-}747\text{-}1000 \mid \textbf{eab.com}$