



Independent School DEI Plan Starter Kit

Resources and Examples to Streamline the
Planning and Writing Process

Independent School Executive Forum

- Section 1: Initiating the Planning Process
- Section 2: Plan Development
- Section 3: Writing and Organizing the Plan
- Section 4: Implementation



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Initiating the DEIJ Planning Process

SECTION

1

- Assess Your School's Readiness
- Choose Your Planning Time Horizon
- Build and Organize Your Planning Team
- Ground DEIJ Planning With an Organizational Framework

Assess Your School's Readiness

Questions to Ask Before Starting a School-wide DEIJ Planning Process

Demands for quick action to address racial justice are growing in urgency. But without due diligence, the planning effort may lose momentum or point your school in the wrong direction. Use the questions below to determine whether your school is ready to proceed with school-wide DEIJ planning. Your answers will indicate whether you need to build a stronger foundation for success or whether the essentials are in place to get started.



Leadership Support and Buy-In

Clear support from school leaders is essential to establishing DEIJ as a school priority and driving progress.

- ▶ Does our leadership team see the strategic value in DEIJ planning and progress?
- ▶ Does our DEIJ planning initiative have vocal support from departments and units across the school?

Society for Human Resource Management

- [Commitment From the Top](#)

- Questions to consider (e.g., who are your natural champions?) and recommended action steps for securing leadership buy-in

Georgetown Day School

- [Recruiting and Retaining Black Faculty](#)

- Leadership prioritizes culturally responsive hiring protocols, peer mentoring programs, and annual survey data to improve recruitment & retention of Black faculty



School Strategic Plan

Alignment with overarching school goals is key to successful DEIJ strategic planning.

- ▶ Is DEIJ a key component of our school's most recent strategic plan?
- ▶ How will the DEIJ plan align with and build off the strategic plan?



Key Stakeholders and Resources

DEIJ planning requires diverse perspectives and participation across the school and beyond.

- ▶ How can we recruit stakeholders from across the school so that responsibility is not placed solely on our Director of Diversity & Inclusion?
- ▶ What mechanisms do we have to engage our surrounding community in the planning process?



Data Infrastructure

Trusted, high-quality data is a primary input measuring progress on DEIJ initiatives and affects the credibility of the plan.

- ▶ Can we access high-quality data as needed to support DEIJ strategic decision making?
- ▶ Does our school culture embrace the use of success metrics to measure impact and progress toward strategic goals?



Communication

The DEIJ plan must resonate with a variety of audiences, both internally and externally.

- ▶ Can we make use of a robust network of channels for communicating strategic issues and goals (e.g., website, blog, town halls, social media)?

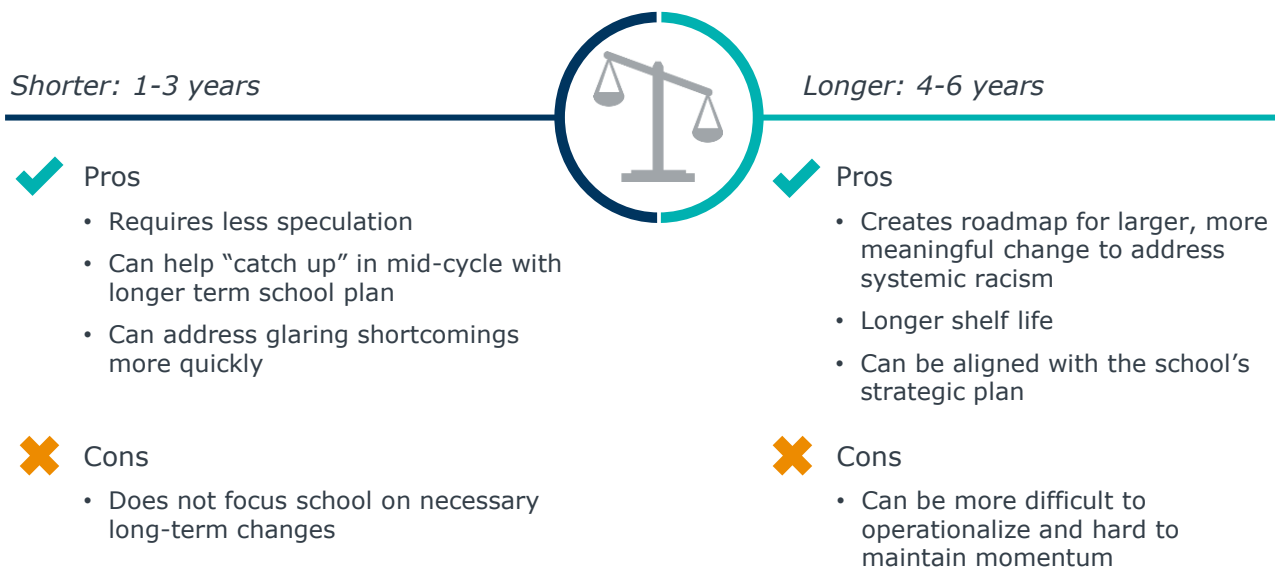
Source: EAB interviews and analysis.

Select an Appropriate Planning Time Horizon

Considerations for Choosing Your DEIJ Plan Timeline

Once your school is ready to proceed with DEIJ planning, one of the first details to decide is the time period your plan will cover. This decision has implications for the whole process, affecting actions like what goals to set and what kind of data and analysis you require. More fundamentally, it sets bounds on the sort of school and organizational changes the plan will consider. Four to five years is a common DEIJ strategic planning timeframe, but some schools may prefer a shorter period to better respond to pressing challenges. See below for pros and cons of both shorter- and longer-term DEIJ Plans.

Weighing Agility and Preparation for Long-Term Needs in Your Planning



Build a Representative Planning Committee

Considerations for Who To Involve

While the Director of Diversity & Inclusion plays a critical role, EAB research highlights how no single individual or office should be solely responsible for the planning and execution of a school-wide DEI plan. To drive meaningful progress, coordination across the school is essential and your planning committee should reflect this reality.

In general, committee members can be either appointed, nominated, or recruited through an open call to participate. Other factors to consider include participant availability, time commitment, expertise, and how size of group can help or hinder progress. Keep in mind that participants can serve in either permanent positions or supplemental advisory roles as needed for specific issues or project phases.

Use the checklist below to ensure the planning committee accurately reflects your school.

Potential Stakeholders for DEI Strategic Plan Development

Department Representative	Permanent Member	Advisory Role
Human Resources	☐	☐
Finance	☐	☐
Enrollment Management	☐	☐
Curriculum and Instruction	☐	☐
Academic Dean(s)	☐	☐
Student Affairs	☐	☐
Students/Student Government	☐	☐
IT	☐	☐
Advancement	☐	☐
Other: _____	☐	☐



See how [Menlo School](#) includes a teacher and the director of community engagement alongside Equity, Diversity and Inclusion (EDI) staff to form the EDI Strategic Plan Taskforce.

Source: EAB interviews and analysis.

Build a Representative Planning Task Force (cont.)

Achieving a Diversity of Perspectives and Embracing Strategic Change

Too often, planning teams, composed of stakeholders with different backgrounds and expertise, produce incremental visions and poorly articulated goals, failing to envision the district as different in the future. That is typically because they must navigate group dynamics and mindsets that limit strategic thinking, namely, cognitive biases or inclinations toward a particular thought pattern.

To effectively manage group dynamics and let go of preconceived ideas, EAB recommends applying psychological principles through role play at some of your task force meetings. This will force participants to adopt the perspectives of others. EAB recommends the Six Thinking Hats Framework to guarantee that a variety of different perspectives are represented:

- Blue: focus on leading, making sure all “hats” are represented
- White: focus on data and gaps in knowledge
- Yellow: focus on strengths and optimism
- Black: focus on weaknesses and criticism
- Green: focus on creativity and imagination
- Red: focus on emotion and gut reactions

Applying this framework will force your team to communicate in new and different ways, encourage a larger range of perspectives to drive analysis for problems, improve the quality of ideas and solutions, and improve the likelihood that initiatives and messages will gain traction and engagement across your school.

Apply Psychological Principles at Some of Your Meetings



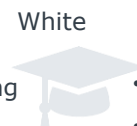
Six Thinking Hats Framework Role Play

As a team, walk through each of the six thinking hats together, one hat at a time. In doing so, your team will examine an individual scenario from every angle as a group and leverage parallel thinking for rigorous debate and stronger solutions.



Blue

- Focus on steering the meeting
- Direct conversation



White

- Focus on data
- Analyze trends
- Identify gaps



Yellow

- Focus on strengths
- Be optimistic



Black

- Focus on weaknesses
- Be critical



Green

- Focus on creativity
- Brainstorm out-of-the-box solutions



Red

- Focus on emotion
- Provide skeptics' gut reaction



See the appendix for a group exercise to practice applying the six thinking hats framework.

Organize Your DEIJ Planning Committee

Considerations for Organizing Your Team

DEIJ planning committees should be organized in a way to overcome common strategic planning pitfalls, including:

- Committee deadlocks that stall progress
- Too much emphasis on discussion, not enough on making decisions and drafting the plan
- Lack of accountability for attendance
- Loss of interest due to lack of senior leadership involvement

That said, there is no “correct” infrastructure for the planning team. Explore the sample organizational structures below to determine the best fit for your school.

Bicameral Committee Structure Balances Steady Work With Periodic Oversight

Oversight & Review Committee



Role/Purpose

Direction setting; reviews and approves strategic plan drafts



Seniority

Head of School, Assistant Head of School, leadership cabinet positions



Time Commitment

4-8 hours per month

DEIJ Planning Working Group



Role/Purpose

Execution; holds workshops, prepares materials, finalizes drafts



Seniority

Grade Team Lead, Department Chair

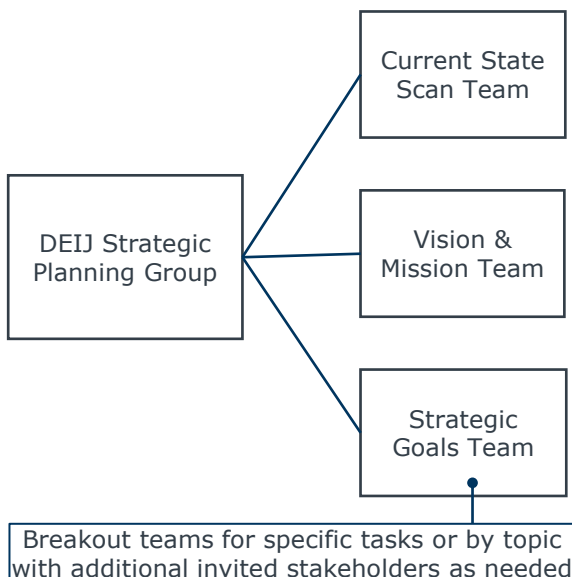


Time Commitment

10% - 20% of time for duration of the project



Organize Subcommittees by Task/Topic



School Guidance Example

► *University of California, Berkeley*

- [Strategic Planning Toolkit for Equity, Inclusion, and Diversity](#) (p. 17)

– Guidance and considerations for establishing the infrastructure of your DEIJ planning process, including planning team models, roles, and responsibilities

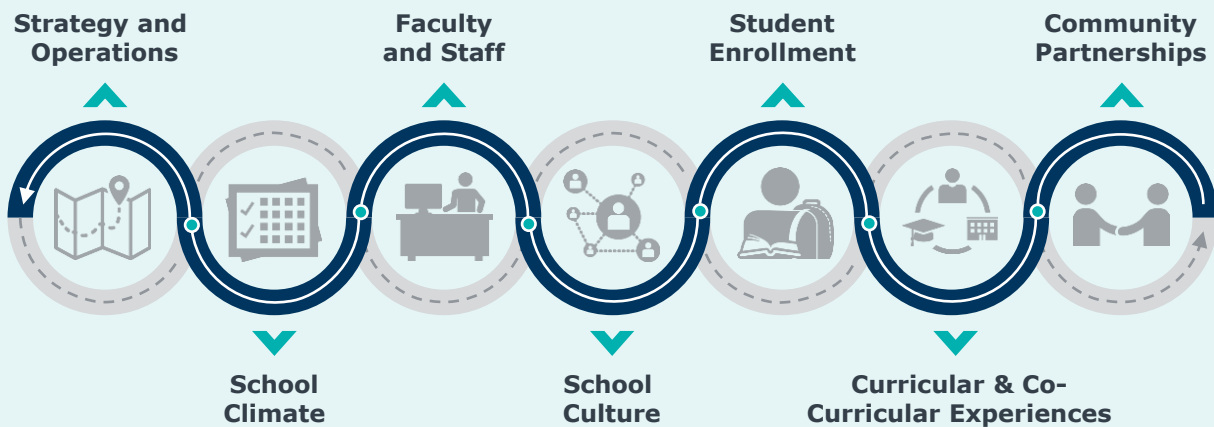
Ground Your Plan With an Organizational Framework

Schools need to center their DEI planning around a comprehensive framework that marries transformative goals with more granular components to support ongoing actions at all levels. While the context of your school and community will change, an organizational framework will help to ensure that racial justice remains a centerpiece of your school's mission and work.

Explore EAB's framework below and review the related webinar to ensure the actions you take will not just be one-off or standalone initiatives, but rather a part of ongoing conversations and work to meet long-term strategic goals for your school, students, employees, and communities.

EAB's Framework for Transformation

Continuous Behaviors and Actions that Promote Racial Justice in Education



Webinar: Hallmarks of an Anti-Racist Institution

The Behaviors and Actions that Promote Racial Justice in Education for Independent School Leaders

[Uncover the Hallmarks Here](#)

School Framework Examples

Miami Country Day School

- ▶ • [Diversity, Equity, and Inclusion Strategic Framework](#)
 - See how Miami Country Day's framework addresses school climate & culture, program & professional development, and employee recruitment and retention.

California State University San Marcos

- ▶ • [CSUSM's Definition of a Diversity Framework](#) (p. 2-3)
 - See how CSUSM, as a public school, tailored an executive order into its own Diversity Framework

Source: EAB interviews and analysis.

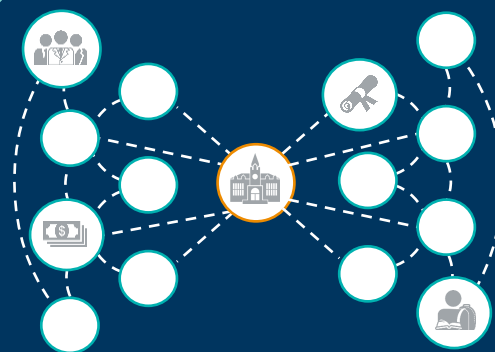
Use Systems Thinking to Apply Your Framework

The traditional approach to solving problems in schools is by breaking down complex issues into discrete, isolated units. When addressing structural racism, this approach fails to account for the interconnected nature of schools and the dynamic impacts that elements have on each other in a system. Systems thinking, however, allows for better understanding complex systems and how they operate. It considers the processes, inputs, and feedback loops happening congruously across interconnected parts of a system. Within a hallmark, using systems thinking supports strategy and intention because it:

Consider participating in an EAB-facilitated workshop to equip you and your cabinet with the tools to analyze how units across the school must work together to amplify and scale the impact of racial justice efforts.

What Is Systems Thinking?

A holistic approach to understanding the complex nature of systems by considering the relationships and patterns between inputs, processes, and their feedback.



This virtual workshop will:

- Outline EAB's industry-wide point of view on what are the **defining actions and behaviors** of an anti-racist school
- Analyze existing **racial inequities and barriers** to transformative change across the K-12 system
- Introduce **systems thinking frameworks** as approaches to address systemic barriers to racial equity on schools

Virtual Workshop Elements



Systems thinking frameworks and tools



Blueprint of behaviors and actions of anti-racist schools



Facilitated cross-cabinet discussion

Participation

If you are interested in participating, **please reach out to your dedicated advisor** to begin the process.



Appendix

Initiating the Planning Process

APPENDIX

- Six Thinking Hats Persona Exercise

1

Six Thinking Hats Exercise

Facilitator Guide

Exercise Goal: By the end of the exercise, participants should be able to identify potential responses to a strategic question and clarify which options they will explore further.

Exercise Time: This activity can be run as an hour-long session with 5-10 minutes dedicated per hat. Additionally, this can be a half day strategy retreat with breakout groups working on multiple strategic questions.

Instructions: Use the “Typical [insert color] questions” to guide the conversation for your strategic challenge. The “Hats” can be discussed in different orders, and the same hat can be returned to multiple times if necessary. However, teams should by and large adhere to the following rules:

- Always start with the Blue Hat to clarify the strategic question that will be discussed. Only one person (the facilitator) wears the Blue Hat
- Follow the Blue Hat with the White Hat to outline the facts related to the strategic question being discussed
- Save the Red Hat until after the facts, opportunities, challenges have been discussed – and typically until after solutions have been proposed and evaluated (with the yellow and black hats)
- Finish with the Blue Hat to clarify the group’s response to the question
 - Sample Sequence: Blue, White, Yellow, Black, Green, Yellow, Black, Red, Blue

Role of the Facilitator: Fairly minimal. This activity is designed to facilitate discussion and ideas-sharing between participants. The facilitator will function mostly as a discussion starter (when necessary), and an unobtrusive guide (e.g., if the conversation veers into nonstop complaining).

Do’s and Don’ts:

- **Do** allow participants to largely determine the flow and pace of the discussion. These are issues that are highly relevant to every school, so participants will likely have a lot to say here
- **Do** encourage leaders to think about their role as Blue Hat (i.e., strategy leaders, discussion/culture drivers) Thinkers, rather than as involved in highly operational activities. This discussion should have them focus on their role as school visionaries and communicators
- **Do** encourage participants to share ideas and tips with one another
- **Don’t** allow the conversation to devolve into simply complaining about certain roles/processes. Ask questions like “What do you think the motivation is behind that?” or “Who has found a solution to this issue?” to guide the conversation to a more productive point

The Blue Hat: Running the Show



What Blue Hat Thinking Does:

- Acts as the “conductor of the orchestra”
- Organizes and manages thinking of the different hats
- Provides an overview of the conversation
- Makes sure people stick to their hats
- Breaks up arguments
- Asks for an outcome at the end—a summary, conclusion, decision, or solution



Typical Blue Hat Phrases:

- *Let’s start by thinking about...*
- *I think we are headed in the right direction, let’s hear some more ideas.*
- *We need to hear more from the white hat to understand the problem.*
- *Now we need some concrete suggestions, let’s hear from the yellow hat.*
- *Hold off on the black hat thinking for a moment—we’re still listening to ideas.*
- *We’re spending too much time arguing.*
- *I hear two conflicting views. We don’t have to decide which is correct right now.*



Typical Blue Hat Questions:

- *What perspectives will we need to have a productive conversation?*
- *What do we need to understand to make a decision or come to an agreement?*
- *Is this the real objective here?*
- *Are we getting anywhere in this conversation?*
- *What outcome would be successful?*
- *What do we all agree on?*

The White Hat: Facts and Figures



What White Hat Thinking Does:

- Collects available information
- Focuses on objective facts and figures
- Separates facts from interpretation and belief
- Prevents distortion of information and ideas
- Excludes hunches, intuition, judgment, feeling, impression and opinion



Typical White Hat Phrases:

- *I want to start by thinking through what we know about this topic*
- *Just give the facts without an argument*
- *We don't know that for a fact*



Typical White Hat Questions:

- *What data do we have?*
- *What is the evidence?*
- *Is that a fact or a likelihood?*
- *Is that a fact or a belief?*
- *Is that a trend?*

The Yellow Hat: Speculative-Positive



What Yellow Hat Thinking Does:

- Looks for the benefit, value, and potential positive outcome in everything
- Provides deliberate constructive thinking as a counterweight to critical thinking
- Thinks about opportunities, and willing to explore remote possibilities of success
- Makes concrete proposals and suggestions for what to do



Typical Yellow Hat Phrases:

- *I have a vision where we could make this happen*
- *I can see how we get this done.*
- *There are a lot of benefits to trying this.*
- *This is going to work.*
- *If there is a remote chance this will work, we should explore it.*
- *Here is the first thing we should do.*



Typical Yellow Hat Questions:

- *What is the best-case scenario?*
- *What are the benefits?*
- *What are all the reasons we could succeed at this?*
- *What is the best next step?*
- *How much do we stand to gain?*
- *Under what conditions would this work?*

The Black Hat: Cautious and Careful



What Black Hat Thinking Does:

- Prevents groups from doing overly risky things
- Introduces caution and skepticism to the conversation
- Identifies why something may not work
- Points out how something does not fit available resources, policy, strategy, mission
- Questions the strength of the evidence and conclusions



Typical Black Hat Phrases:

- *I can see a number of risks and vulnerabilities for us in this plan*
- *Let's try to see the obstacles so that we can figure out how to overcome them*
- *We need to know how risky this is for us*
- *I'm skeptical this will work as planned*



Typical Black Hat Questions:

- *What is the downside?*
- *What are all the potential problems?*
- *Does this conclusion make sense?*
- *Does this fit our past experience?*
- *Do we have the resources to do this?*
- *Is this in line with our policy and strategy?*
- *What can go wrong?*
- *Will this continue to be sustainable?*

The Green Hat: Creative Thinking



What Green Hat Thinking Does:

- Generates new ideas and new ways of looking at things
- Suggests multiple courses of action
- Invested in making changes and innovating
- Interested in thinking through all the alternative ways to solve a problem or launch a new initiative



Typical Green Hat Phrases:

- *I can think of a number of ways we could solve this problem.*
- *We should think through how we could try this idea.*
- *I have a wild idea, but it just might work.*
- *Let's try something different.*



Typical Green Hat Questions:

- *What are all the possible alternatives?*
- *Is there any way we can use this idea?*
- *Can we shape the idea so that it works for us?*
- *How could we test this idea?*
- *What comparisons can we make?*
- *What if we tried it, what would happen?*

The Red Hat: Emotions and Feelings



What Red Hat Thinking Does:

- Acknowledges the hidden emotions that affect every conversation and decision, bringing them to the surface
- Insists that feelings have a right to be made visible
- Honors and gives voice to gut reactions, intuition, hunches, intuitions, impressions



Typical Red Hat Phrases:

- *I feel like this idea has potential.*
- *I find this solution threatening.*
- *That is an unusual approach.*
- *Don't ask me why, I just don't like this vision.*
- *I have a hunch...*
- *I have a soft spot for...*



Typical Red Hat Questions:

- *What is your gut reaction?*
- *How do we think people will react?*
- *How will our stakeholders feel?*
- *What's our best guess?*
- *What is the opinion about...?*
- *Is this fair?*

Identifying the Six Thinking Hats at Your School

- 1 What behaviors or tendencies have you observed from school staff who tend to display [color] hat thinking?
- 2 What are their long-term priorities? What are they concerned about?
- 3 What is the most effective way to persuade a [color] hat thinker?
- 4 Where is [color] hat thinking valuable when creating strategy? Where should we be plugging [color] hat thinkers in?

Identifying the Six Thinking Hats at Your School

1

What hat(s) did you identify with most before joining your school's planning committee?

2

What is the composition of your committee, in terms of thinking styles? What thinking style(s) is underrepresented?



Group Discussion: Now that you've reflected on the thinking styles within your school, how would you better drive progress on a key initiative (e.g., planning committee structure, accountability mechanism, org design, goals)



Plan Development

SECTION

2

- Assess the Current State of DEIJ at Your School
- Uncover Hidden Sources of Data
- Engage Students through Fair Process
- Hold Unit-Level Listening Tours
- Evaluate Local Community Needs
- Conduct a SWOT Analysis

Assess the Current State of DEIJ at Your School

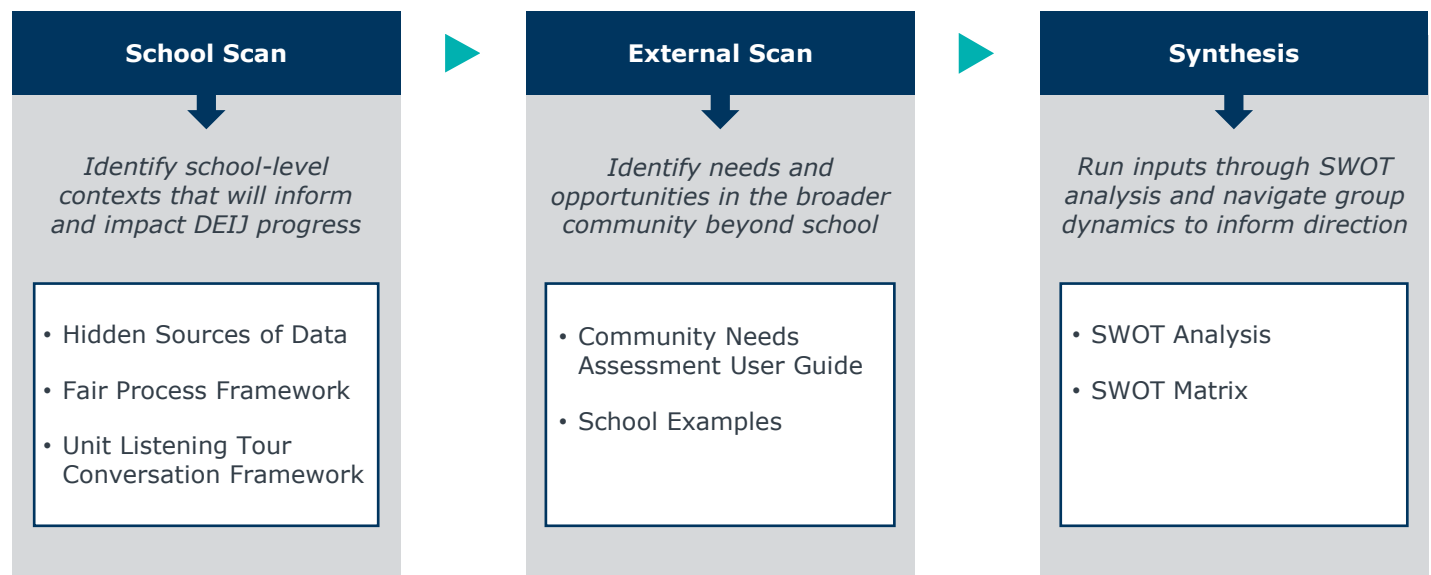
Gathering Information to Provide Context for Planning

One of the first steps the committee should take on is an environmental scan of current DEIJ state at the school to set the context for effective planning. In this process, the committee will gather intelligence to identify strengths, weaknesses, opportunities, and threats. These inputs will help to inform the direction of the DEIJ plan and the strategic goals and actions within it. Data and feedback collected in this stage (e.g., current demographic diversity, retention, and success metrics for students, faculty, and staff) will also provide a baseline that schools can use to measure progress against.

Beyond helping to set course, including context about the school's current DEIJ state in your plan helps to build credibility and ensure that all community members understand the analysis and intentionality that went into creating the school strategy.

To conduct a thorough scan, DEIJ planning committees must gather information from across and beyond their school, accounting for past performance, current capacity, and emerging possibilities. The following pages offer guidance and resources to identify these opportunities.

Key Steps of an Environmental Scan and Analysis



Uncover Hidden Sources of Data

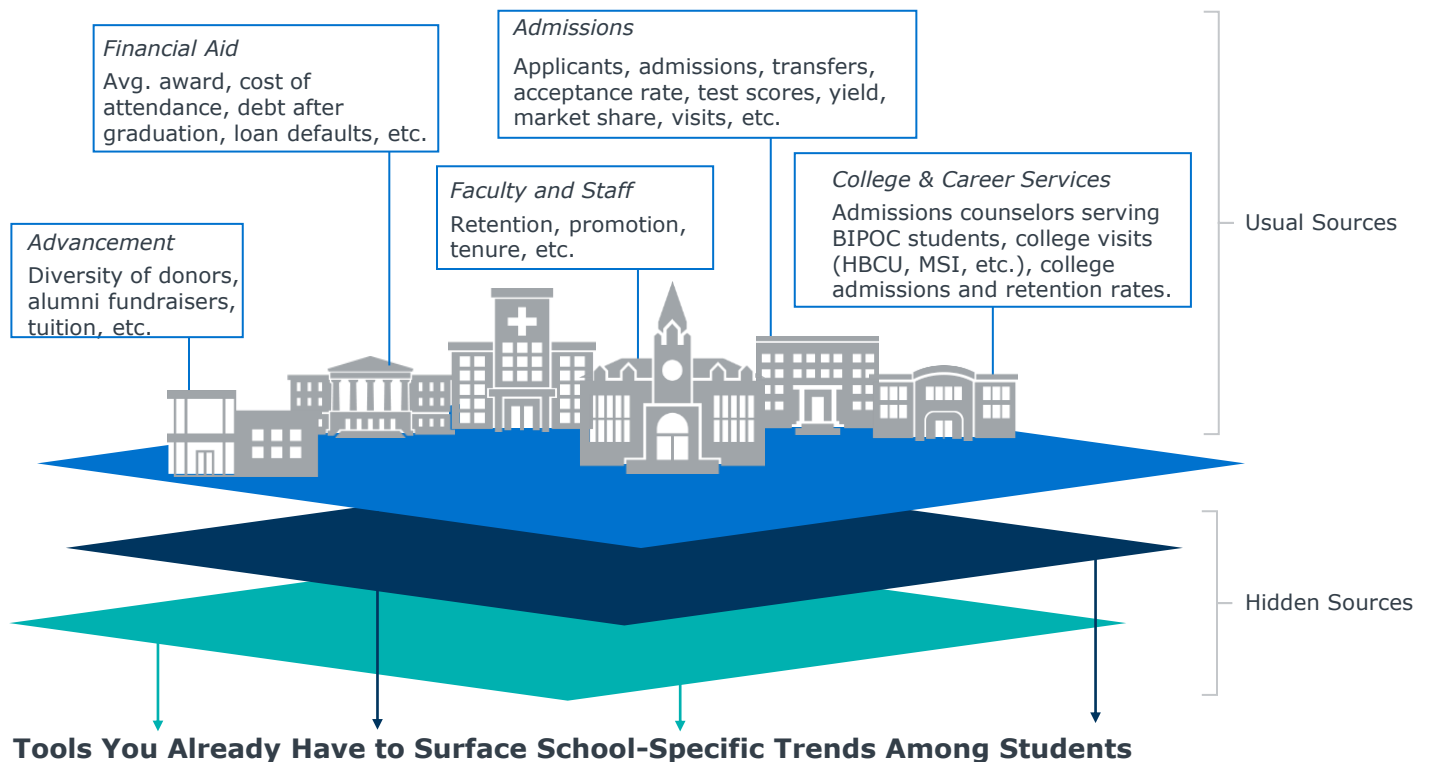
Painting a Fuller Picture with Qualitative Information

Independent schools possess an abundance of data across countless sources. Still, leaders sometimes feel like they lack credible data in certain areas, inhibiting their efforts. This is especially true for qualitative data, which can serve as critical inputs for DEIJ planning.

Some data, like demographics and success, are easier to collect than others. They live across different departments or are tracked in learning management systems. Other data, like responses to climate surveys and other qualitative assessments, can be more difficult to collate into useful formats or even to identify at all. Yet they can help to identify pain points and make improvements.

Consider the data sources and questions below to help inform your planning process.

Usual Data Sources Helpful, But Obscure Troves of Meaningful Qualitative Data



Past Student Activism



Climate Survey Data



Student Roundtables



Real-Time Intel Online

Finding Insights in the Qualitative Data



What have past student activists asked for?



How do students' experiences on school differ by race?



What does our communication with BIPOC students say about how their needs are evolving?



How do current and prospective BIPOC students see our school?

Source: EAB interviews and analysis.

Engage Students through the Fair Process¹ Framework

Following Through on Gathering Student Input

Input from students is critical to DEIJ planning, but traditional efforts don't always instill confidence in the larger student body. There are several reasons for this:

- Students may not believe the small sample of students who have been included in conversations represent the opinions of all students or an important vulnerable student group.
- Students are unaware of the role of the student government association.
- Emerging student groups are increasingly active at your school, yet the leaders of these groups often are not included in conversations with school leaders.
- Decisions are not disseminated on platforms students use most, limiting clarity and leave many students to make assumptions about the process.

To limit issues, schools should embrace a formalized process for incorporating student input. EAB recommends fair process framework for inclusive decisions that prompts you to seek the perspectives of those who will be affected before making a decision that will impact them and explain and clarify the decision after. Above all, fair process should ensure that impacted parties have an opportunity to be heard.

Using the Fair Process Framework for Inclusive Decisions

Fair Process: a commitment to **seeking the perspectives of those who will be affected before making a decision** that will impact them. *Fair Process is NOT a commitment to consensus.*



Engagement

Creating space and time to hear the perspectives of those who will be affected by a decision



How have we sought the perspectives of those who will be affected? If not, how can we?

Explanation

Prioritizing explaining the reasoning behind a decision to everyone who has been involved or affected by it



How do we plan to communicate why we chose to implement or not implement?

Clarity

Providing a clear explanation about what is expected moving forward after a decision



How do we ensure students understand what to expect from us moving forward?

1) Fair process is the commitment to seeking the perspectives of those who will be affected before making a decision that will impact them

Hold Unit-Level Listening Tours

Surfacing Diverse School Needs

Cross-department conversations can also help to unearth perceived strengths, weaknesses, opportunities, and threats. These conversations with academic and administrative leaders (as well as focus groups with larger groups of school constituents) should concentrate on future-focused goals. That said, planning committees should ask about both direction and execution to uncover the “what” and “how” of school DEIJ progress.

Consider the questions and tips for a conversational framework below when seeking unit- and department-level guidance on your DEIJ plan.

Four Tips for Productive Engagements



Sample Questions

Direction Questions

- What is the department trying to accomplish in relation to DEIJ in the next three to five years? How will the department be different than it is today?
- What are things we do well as a school?
- What areas could we improve?
- How must your department change or shift in the next few years to thrive?
- What is the morale like here among staff/faculty?

Execution Questions

- What does meaningful DEIJ progress look for your departments?
- How will your department know the DEIJ plan is successful?
- How would you assess the tolerance for risk across your school?
- How will your school know the DEIJ plan is successful?

Evaluate Local Community Needs

Including Local Community Members in the Planning Process

Independent school DEIJ plans will affect more than just students, faculty, and staff. Executed well, strategy will also impact the surrounding community, and their input should be incorporated into the planning process. To do so, consider conducting a community needs assessment (CNA) and/or community forums for feedback.

These assessments provide a snapshot of local policy, systems, and/or environmental status and identify areas of need and possible improvements. They identify needs based on regional scoping and various populations or groups. Once information is collected, needs are prioritized, and the appropriate strategies are developed.

A full formal community needs assessment may not be necessary in every case, including instances:

- When the most important needs of the community or group are well-known, agreed-upon, and have not changed
- When an assessment was conducted recently, and needs have not changed.
- When the community or group would view the process as redundant and wasteful, hurting the goal.

In such cases, planning committees may consider more informal listening sessions and focus groups with local community members.

Community Needs Assessment Process Guide

1

Plan Assessment

- Identify diverse team and assign responsibilities
- Define parameters
- Determine data requirements
- Create data collection plan
- Develop messaging and marketing
- Create timeline
- Confirm budget

2

Conduct Assessment

- Gather external local data
- Interview community members
- Host listening sessions/ focus groups
- Conduct opinion survey
- Inventory community resources
- Map community assets

3

Analyze Data

- Develop rating scale
- Enter, total, summarize data
- Evaluate and organize qualitative responses

4

Develop Action Steps

- Create reports and present feedback
- Prioritize needs and relevant action steps

Evaluate Local Community Needs (cont.)

Implementation Questions and School Examples

Implementation Questions to Consider

- What information will the CNA seek to uncover? Who makes up the relevant populations? How large is the scope?
- Who at your school will lead the CNA process? Which other internal stakeholders should be involved?
- Which internal and external data sources are available to the CAN team? Which will provide the most relevant data?
- Which are the right/best-fit community partners who can assist with trust-building and messaging?
- Which external partners could support the execution of a CNA?
- Are there external funding opportunities to support program implementation?
- How will you communicate the findings and the value of the CNA? How will you incorporate local community feedback?
- Who will create and who will sign off on the action steps?
- Who will be responsible for reporting on progress and at what frequency?

Examples and Guidance

- Stevens Cooperative School [NAIS Assessment of Inclusivity and Multiculturalism](#)
- NC Community Health Assessment Process [Community Assessment Guidebook](#)
- University of Michigan [Engaging Your Community Guidance](#)
- [Saline Area Schools](#) organized sequential listening sessions to move forward and address new topics .

Conduct a SWOT Analysis

Compiling Comprehensive Environmental Scanning Documents for Review

Completing both internal and external scans produce a varied and potentially large set of outputs to synthesize in a strengths, weaknesses, opportunities, and threats (SWOT) analysis. Ultimately, this exercise will help set direction for your DEIJ plan.

Strive for concise and readable documents that focus on the essential issues of each scanning exercise. Make the materials available to SWOT exercise participants at least a week in advance and reserve them for reference by other parties in later stages of the planning process. Follow the steps below and use the resources in the appendix to conduct a SWOT analysis of your findings.

Conducting a SWOT Analysis

- 1 Facilitator separates participants into groups.**
 Participants will be assigned either to a Strengths/Weaknesses group or to an Opportunities/Threats group. All participants should have read all the preparatory material.
- 2 Within groups, participants complete the appropriate *Individual SWOT Analysis Worksheet* (see appendix), then share answers.**
 Each group selects a reporter to record draft items. Note common elements among different items, scrutinize items for clarity, accuracy, and strategic significance.
- 3 Participants revise draft SWOT items as desired.**
 Participants may work individually or collaborate. Draft items may be left the same, withdrawn, or rewritten.
- 4 Groups break up for lightning review and voting round.**
 Participants circulate around the room reading the posted drafts. Each person has five voting stickers each for S, W, O, and T which they affix to the draft items of each type they think are best.
- 5 Top-voted statements read aloud.**
 Return to tables. Facilitator identifies the five top-voted items in each category and reads them aloud. Draft statements are documented with author name(s) and vote count and forwarded to the ITSP working group for creation of a finalized SWOT matrix.

What to Look for In a SWOT Matrix



Taken as a whole, the matrix comprehensively expresses the school DEIJ environment



Items have strategic, not merely tactical significance



Items are easy to understand and concisely expressed



Appendix

Plan Development

-
- SWOT Analysis Toolkit

APPENDIX

2

Individual SWOT Analysis Worksheet #1

Strength	Why is this a current strength? Please provide specific examples.	What are the implications for the school?

Weakness	Why is this a current weakness? Please provide specific examples.	What are the implications for school?

Individual SWOT Analysis Worksheet #2

Opportunity	Why is this an area of opportunity? Please provide specific examples.	What are the implications for the school?

Threat	Why is this a current weakness? Please provide specific examples.	What are the implications for the school?

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Writing and Organizing Your DEI Plan

SECTION

3

- Key Components of a School DEI Plan
- Avoid These Common Language Mistakes in Your DEI Plan
- Develop Actionable Goals and Objectives
- Enhance Action Steps with the SMART Goals Framework
- Define Success Metrics

The Key Components of an Independent School DEIJ Plan

Structuring Your DEIJ Plan

While there is no single ideal structure of a DEIJ plan, each should address seven essential components to demonstrate commitment to and ensure progress toward school goals. These elements, uncovered in a review of 50+ plans, are outlined below, with additional guidance on the following pages.

1 Making the Case for DEIJ Progress



Plans that do not outline the school-specific urgency and need for DEIJ progress can signal inauthenticity and a lack of real commitment.

2 Finding a Common Language



Progress requires a clear understanding of the key terms that compose this topic and the power of language. DEIJ plans can be an important avenue through which schools can create a common foundation and standard definitions.

3 Understanding the Plan Development Process



Include details about the plan development process to build credibility and ensure that all community members understand the analysis and intentionality that went into creating the school strategy.

4 Developing Actionable Goals and Objectives



DEIJ goals need to be responsive to community needs. A plan that is divorced from reality will not inspire confidence and further exacerbate the trust gap between historically underserved communities and school leadership.

5 Embedding Accountability Measures



All too often, schools fail to make progress on strategic DEIJ goals because they have not assigned responsibility for them and/or established deadlines and timelines for their objectives.

6 Defining Success Metrics



Without metrics, schools cannot evaluate progress toward goals. However, many DEIJ plans either omit metrics entirely or conflate them with status tracking, defining success simply as executing an action.

7 Establishing Ongoing Communication Processes



Schools need to set the expectation upfront that there will be regular updates about the work in the plan to keep the community informed and start to establish trust with groups that have been previously disappointed by school efforts.

Avoid these Three Language Mistakes in Your DEIJ Plan

Part 1

While developing a DEIJ plan, it's important for to consider how to frame your priorities and commitments. Many plans use generic and deficit-based language to articulate their priorities. This inattention to language impedes the specificity of action plans and can raise doubts amongst students, faculty, and staff about the school's commitment to progress. To create a common foundation and a shared understanding of school priorities, academic leaders should avoid the following common mistakes made in DEIJ plans.

✗ **Avoid Using Generic Definitions of Diversity, Equity Inclusion, and Justice**

✓ **Contextualize Definitions to Your School Reality**

Often, school leaders use DEI and J terms interchangeably without recognizing the distinct meaning each concept brings to this important work. To make progress on DEIJ priorities, schools must have a clear understanding of what each theory actually means. However, including standard definitions of DEIJ is not enough.

DEIJ plans should be unique and relevant to the distinctive context of your school. This also applies to the language used in these plans. Leaders should ensure that all community members have a shared, school-specific understanding of what diversity, equity, inclusion, and justice means at their school. This creates a common foundation for progress.

School Examples



Naming Historically Marginalized Groups: Strengthen our care and support for students and community members impacted by systemic racism and any discrimination based (but not limited to) age, ethnicity, and race, family status, gender, geographic origin, learning styles, mental or physical ability, religion, sexual orientation, and socio-economic status.

[Miami Country Day School's Diversity, Equity, and Inclusion Strategic Action Plan](#)



Equity is the moral responsibility of each member of our learning community to take the intentional actions necessary to create a learning community free of barriers, biases, and disproportionality for each and every person regardless of personal characteristics and social circumstances.

[Ann Arbor Public Schools Equity Plan](#)



See the appendix and [additional key terms here](#) to contextualize EAB's definitions to your school.

Avoid these Three Language Mistakes in Your DEI Plan

Part 2

✘ Do Not Use Euphemisms When Discussing Target Populations

✔ Be Explicit About Who You Are Trying to Serve, While Recognizing Intersectionality

Most DEI plans include goals related to supporting “underserved”, “underrepresented”, “marginalized”, or “minoritized” communities on school. While there are implied definitions of these terms, it’s important to consider how they vary for each school. Leaders should unpack these terms to provide greater specificity into the populations they hope to serve and support through their plans. Without this foundational work, it is challenging to develop targeted solutions and to accurately assess progress and the impact of proposed action steps.

Further, it is important to recognize how different social identities impact one another. An intersectional DEI approach recognizes that social identities do not exist in isolation and instead are interconnected and impact one another. When applying an intersectional lens to DEI strategies, schools acknowledge how systems of oppression affect one another. For example, they consider how race and gender intersect to shape the experiences of women of color or recognize how class and ability status impact the needs of disabled low-income folks. This perspective will help school leaders develop solutions that account for the holistic experience of their community members.

Examples



See how [University of Wisconsin, Superior](#) explicitly states their school definition of underrepresented minorities and underserved populations in their DEI plan (p. 6)

“For the purposes of this plan, it’s also important that the school community understand the demographics in which the plan prioritizes:

Underrepresented Minority Students at UW-Superior

- 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)



See how [University of Alberta’s](#) EDI Strategic Plan incorporates an intersectional lens to their work.

“Intersectionality

An intersectional approach to equity, diversity, and inclusivity begins from the understanding that the different vectors of social diversity, (race, class, gender, sexuality, disability, nationality, religion, language, age, etc.) do not exist separately or in isolation from each other. Instead, the various vectors of social diversity are interwoven and affect each other. Intersectionality focuses on how multiple, interwoven vectors shape social belonging, cultural representations, social and political schools, as well as the material conditions of our lives in ways that are not reducible to any singular vector or social category.

Avoid these Three Language Mistakes in Your DEI Plan

Part 3

✗ Avoid Using a Deficit-Based Approach in Your DEI Plan

✓ Use Asset-Based Language throughout Your Document

When drafting DEI plans, school leaders should refrain from using a deficit-based approach which places the onus for current disparities on marginalized communities. This runs the risk of reinforcing stereotypes. Instead, plans should focus on how school processes, policies, or strategies contributed to or exacerbated entrenched inequities. This asset-based approach centers school responsibility over perceived “deficits”. For example, instead of pointing out how students lack college navigation skills, school leaders should consider why their schools are hard to navigate in the first place and work to rectify that.

This approach is essential in ensuring that schools take responsibility for their actions and recognize their role in dismantling systems of oppression. It also ensures that action steps and strategies are addressing systemic and structural issues that perpetuate inequities on school.



Deficit-Based Language

Focuses on rectifying a perceived “shortcoming” of a person or community and assumes that they need to be “fixed” to succeed. Examples include achievement gap, at-risk, learning loss, underprepared.



Asset-Based Language

Asset-based language emphasizes that school structures and systems must change to better serve historically marginalized communities—not the other way around. Examples include equity gap, education debt, opportunity gap.



Review the [Center for Urban Education at University of Southern California's toolkit](#) to learn more about the pitfalls of deficit-mindedness.

Develop Actionable Goals and Objectives

Considerations for the Structure and Content of Goals

For a DEIJ plan to be successful, overarching goals need to be broken down into sub-steps and strategies to demonstrate commitment and provide a blueprint for progress. Moreover, plans need to be school-specific and contextualized to their reality—there is no one size fits all approach to advancing DEIJ on school. These elements are essential in ensuring that DEIJ plans are actionable and conducive to building trust with the school community. See below for guidance and blinded examples on how to structure goals and reflect school context in their content.

1 Break High-Level Goals into Discrete Action Steps to Provide a Blueprint for Progress

- Increase enrollment of minority students, those with disabilities, low income, and international populations by providing access and opportunity through removal of barriers and more intentional and targeted recruitment efforts
 - Develop a comprehensive recruitment and communication plan with tailored messaging and outreach while providing students and their families with any assistance needed through the entire application and admission process.
 - Use data-informed graduate student financial aid and stipend policies to attract and retain an increased number of students of color, women, and those with disabilities

2 Target Goals to Support School-Specific Historically Underserved Groups

- Enhance Indigenous presence in public spaces, as well as the availability of cultural and living spaces for Indigenous students, faculty, and staff.
- Review school policies that establish accommodations for students with disabilities and observing religious holidays to ensure, insofar as possible, equity in academic assessments.

3 Address School's Role in Perpetuating and Benefiting from Systems of Oppression

- Lead research initiatives to enhance knowledge of, and to address equitably, the school's connections to slavery and colonialism.
- Explore ways to better engage the community in our complex school history with respect to racial and social equity.

4 Incorporate a DEIJ Lens into Strategy and Operations at All Levels of the School

- Continue efforts to diversify the Board of Trustees membership and build their cultural competency to lead more effectively.

5 Recognize the School's Broad Reach and Role in the Local Community

- Expand supplier diversity program to focus on local businesses with a focus on BIPOC-, woman-, and veteran-owned businesses.
- Supporting advocacy work to end systemic racism and violence, including community organizing, protest/dissent, electoral engagement, and legislative and policy changes.

Enhance Action Steps with SMART Goals Framework

SMART Goals Inspire Commitment and Make It Easy to Evaluate Progress

Schools can better deliver on their DEIJ strategies by developing action items using the SMART goals framework. SMART goals are defined as specific, measurable, attainable, realistic, and timely. For example, instead of committing to a more general goal like “diversifying faculty,” a school might commit to specifically recruiting more Black faculty and establishing new positions.

SMART goals benefit DEIJ plans by providing clarity and direction, as well as setting expectations for the school community. Use this framework and the tools in the appendix to ensure that goals can be acted upon in a strategic manner.

The SMART Goal Framework

Questions to Consider When Defining School-Wide Goals

S

Specific

- Who will be responsible for reaching the goal?
- What are specific outcomes of the goal?
- Why is this goal our top priority

M

Measurable

- What metrics will be used to assess impact and progress toward or away from the goal?
- At what benchmark is goal considered achieved?

A

Attainable

- Does the school have reasonable means to achieve the goal?
- Has the goal been achieved at other comparable schools?

R

Realistic

- Do all stakeholders agree on the desired outcome of the goal?

T

Timely

- At what point should the goal be achieved?
- At what point should progress updates be made?

SMART Goals in Practice

The following SMART goals are collected from different school initiatives to provide real-world examples of how schools adopt SMART goals in practice. The components of the goal that are specific, measurable, actional, realistic, or time-bound are highlighted in bold.



GDS commits to anti-racist goal of strengthening recruiting, hiring, support and retention of Black Faculty and Staff. **Action items to achieve the goal are earmarked as either planning, in progress, or complete** on the GDS website. All current action items will be complete in the next four to 12 months.

Georgetown Day School
[Anti-Racism Action Plan](#)



"Menlo School will **provide anti-racist learning opportunities for all stakeholders** (student, parents, faculty, staff, alumni and board members). Additionally, Menlo commits to **increasing investments and contracts with BIPOC owned and/or led companies and organizations by 5%**.

Menlo School
[Equity Diversity and Inclusion Strategic Plan](#)



David Douglas School District commits to identifying multiple pathways of family engagement among them being annual family surveys and feedback loops to give and receive information. Additionally, the Director of ESL and Equity along side the Family Community Partnership Coordinator **plan to host stakeholder meetings in multiple languages by fall of 2022.**

David Douglas School District
[Strategic Plan 2021-2026](#)

Define Success Metrics

Demonstrating Progress and Impact of Strategies as a Means of Accountability

Too often, DEIJ plans either omit metrics entirely or conflate them with status tracking, defining success simply as executing an action. For example, many plans contain success metrics that track progress on the completion of specific initiatives related to strategic objectives, rather than progress on the objectives themselves. Schools that view metrics this way run the risk of inaccurately measuring the impact of their DEIJ efforts.

While there is no one-size-fits all approach to measuring success, planning committees should ensure that metrics in their plans are measurable, instill accountability, directly link to strategic objectives, measure impact, and provide actionable information for future work.

Characteristic	Progress Tracker	Success Metric
<i>Example</i>	<i>Antiracism taskforce is stood up and meets consistently for a year</i>	<i>Change in student retention rates for Indigenous men year-over-year</i>
Documents the Execution of a Stated Action Item	Yes. Progress trackers instill accountability by allowing schools to demonstrate completion status of promised commitments.	No
Measures the Impact of Action Items on Achieving Overall Plan Objectives	No	Yes. Success metrics instill accountability by allowing schools to determine if action items help achieve overall plan objectives.
Provides Information for New Future Programming	No	Yes. Success metrics allow schools to diagnose opportunities for continued growth and development.
Connects to Specific Sub-Goals and Action Items	Yes. Progress trackers are most helpful when linked to specific action items to allow constituents to determine whether school commitments are successfully executed.	No
Connects to Overall Action Plan Goals and Objectives	No	Yes. Success metrics are most useful when linked to the overarching goals or objectives of a DEIJ action plan.
Can be Compared to Baseline Data	No	Yes. Success metrics can be easily compared to status quo data to determine the efficacy of an action plan.
Can be Staggered Based on Time Horizon for Goal Execution	No	Yes. Success metrics can be adapted to the specific timeframe for execution of the goal.
Can be Disaggregated by Demographic or other Data Vectors (e.g., race or ethnicity, gender, socioeconomic status, first-gen status, veteran status)	No	Yes. Success metrics allow for greater nuance because they can be adapted to the target populations of the plan.



Appendix

Writing and Organizing Your Plan

SMART Goals Framework
EAB's Glossary of Terms

APPENDIX

3

Applying the SMART Goals Framework

Directions

Purpose of this Tool

DEIJ strategic plans include several top goals and priorities that schools wish to achieve. However, these goals often lack clear definitions, implementation steps, and success metrics. EAB recommends that planning committees consider the SMART goal framework when outlining school-wide goals. This tabletop exercise will help planning committees better understand SMART goals and draft more accountable plans.

How to Use This Tool

This exercise will walk you and your team through five key steps for developing SMART goals:

1. Choosing a goal for your school to pursue
2. Identifying three to five current barriers to achieving your goal
3. Brainstorming one to three SMART goals that could help mitigate or address each barrier
4. Assigning the appropriate project owners for each action item
5. Determining your initiative's metrics of success

Choose Your DEIJ Strategic Goal

Step 1

Instructions

Review the following strategic goals, based on EAB's hallmarks of an anti-racist institution framework, and choose one as the focus of your activity.



Consistently Assess School **Strategy, Policies, and Operations** Through a Racial Justice Lens



Build an **Inclusive School Climate** that Promotes Learning and Safety for All Community Members



Sustain Investment in **Recruiting, Developing, and Advancing** BIPOC Faculty and Staff



Center and Celebrate the Lived Experiences of BIPOC within School Culture



Expand Enrollment Strategy to Promote **College Access and Financial Justice** for BIPOC Students



Create and Scale **Curricular & Co-Curricular Experiences** that Are Reflective and Inclusive of BIPOC



Establish Robust **Partnerships to Advocate for Racial Justice** in the Local and Extended Community

Identify Barriers to Achieving Your Goal

Step 2

Instructions

Identify three to five barriers or challenges at your school that have prevented you from accomplishing the goal you chose above.

Existing Barriers to Success	
Goal:	
1.	
2.	
3.	
4.	
5.	



Pro Tip: Review materials from your school and external scans to identify problems in this area.

Brainstorm SMART Goals

Step 3

Instructions

Choose three SMART goals that could help mitigate or address each barrier. Consider the questions below and the previous examples ensure your goals add clarity and direction to initiatives.

Barriers to Success	SMART Goal #1	SMART Goal #2	SMART Goal #3



Guiding Questions

- Do all stakeholders agree on the desired outcome of the goal?
- Does the school have reasonable means to achieve the goal?
- Has the goal been achieved at other comparable schools?
- At what point should the goal be achieved?
- At what point should progress updates be made?

Assign Project Owners

Step 4

Instructions

Identify the appropriate project owners for each action item. When choosing project owners, consider the questions below to determine the appropriate school leader, staff or faculty member for each action item.

SMART Goal	Project Owner



Guiding Questions

- Does this action item fall within the purview of the project owners’ unit?
- Does this project owner have the necessary authority to effectively execute on this action item?
- Does this project owner have the necessary expertise and experience to effectively execute on this action item?
- Does this project owner have the bandwidth to take on this action item? Can they meet the expected deadline? If not, should the deadline be adjusted or should a new project owner be designated?
- How will this project owner be motivated to execute on this action item? Will it be tied to performance reviews? Will they be able to gain professional experience they have asked for in the past?

Determine Metrics of Success

Step 5

Instructions

An essential component to developing SMART goals is knowing when and how your goal has been accomplished, as well as the impact it has had. While one aspect of that component is captured through developing measurable goals, it can be difficult in schools to know what metrics are appropriate to measure. With your team, review the SMART goals you’ve developed and discuss what metrics could apply to each goal to track progress, considering the questions below.

SMART Goal	Metric for Success



Guiding Questions

- At what benchmark is goal considered achieved?
- Does the metrics stem connect to the over-arching strategic objective?
- Does the metric define success as structural and/or behavioral change, rather than execution of an action?
- Will the metric provide information for new future iterations of the goal?

Glossary of Terms

The power of language matters, and we must be clear about the concepts that we are applying to our school concepts. Use the common terms and definitions below to help make dialog about diversity, equity, inclusion, and justice explicit at your school.

Ableism

Practices and dominant attitudes in society that assume there is an ideal body and mind that is better than all others.

Allyship

An active and consistent practice of using power and privilege to achieve equity and inclusion while holding ourselves accountable to marginalized people's need.

Anti-Racism

Identifying, challenging, and changing the values, structures, and behaviors that perpetuate systemic racism.

Asset-Based Language

By defining communities by their aspiration and contributions the focus shifts from what's wrong with this person or community to what's right. Asset-based language leads with shared values and emphasizes collective responsibility for solving collective problems.

Belonging

A sense of fitting in or feeling like you are an important member of a group.

Centering the margins

The discursive shift from the majority or dominant perspective to that of minority or subaltern groups.

BIPOC

An acronym that stands for Black, Indigenous, and People of Color communities.

Critical Race Theory (CRT)

Developed officially in 1989 by a group of legal scholars of color and has since spread to many disciplines. CRT suggests that racism remains pervasive in the US, impacts all aspects of society, and is seamlessly embedded in policies and social life—and the individual racist does not need to exist for school racism to be pervasive.

Culturally Responsive Teaching

Research-based approach to teaching that makes meaningful connections between what students learn in schools and their cultures, languages, and life experiences.

Diversity

Representation of all the different characteristics that make one individual or group different from another.

Glossary of Terms

Dominant Culture

The cultural beliefs, values, and traditions that are centered and dominant in society's structures and practices. Dominant cultural practices are thought of as "normal" and, therefore, preferred and right. As a result, diverse ways of life are often devalued, marginalized, and associated with low cultural capital. Conversely, in a multicultural society, various cultures are celebrated and respected equally.

Equity

Evaluating systems and schools to remove biases in the distribution of opportunities and resources.

Ethnicity

A socially constructed grouping of people who share a common cultural heritage derived from values, behavioral patterns, language, political and economic interests, history, geographical base, and ancestry. Examples include: Haitian, African American (Black); Chinese, Korean (Asian); Cherokee, Navajo (Native American); Cuban, Mexican (Latinx); Irish, Swedish (White European).

Gender Expression

External appearance of one's gender identity, usually expressed through behavior, clothing, haircut, or voice—which may or may not conform to socially defined behaviors—and are typically associated with being either masculine or feminine.

Gender Identity

One's innermost concept of self as male, female, a blend of both, or neither—how individuals perceive themselves and what they call themselves, sometimes different from their sex assigned at birth.

Implicit Bias

The attitudes or stereotypes that affect our understanding, actions, and decisions in an unconscious manner. These biases are activated involuntarily and without an individual's awareness or intentional control.

Inclusion

Ensuring differences are welcomed, different perspectives are respectfully heard, and every individual feels a sense of belonging.

Inclusive Pedagogy

A student-centered approach to teaching by which teachers create an inviting and engaging learning environment to all students with varied backgrounds, learning styles, and physical and cognitive abilities in the classroom.

Individual Racism

The conscious prejudice, hate, or bias against people based on race.

Interest Convergence

The notion that progress toward racial equity is only accommodated when it is also in the interests of whites.

Glossary of Terms

Intersectionality

A lens through which to view social issues and see where power and oppression intersect, providing a more holistic view of how individuals are impacted. It includes the understanding that individual or group experiences of oppression cannot be distilled into a single identity.

Justice

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

Economic Justice

Economic justice infuses economic recovery and development with social justice best practices. The goal is to heighten equitable access to resources, including but not limited to access to childcare, healthcare, employment opportunities, healthy food, affordable housing, and education.

Racial Justice

Systematic reinforcement of policies, practices, attitudes, and cultural messages needed to achieve and sustain racial equity, resulting in equitable opportunities and outcomes for all.

Social Justice

The equal access to wealth, opportunities, and privileges within a society.

LGBTQIA

Lesbian, Gay, Bisexual, Transgender, Queer, Intersex, Asexual.

Marginalized

Excluded, ignored, or relegated to the outer edge of a group/society/community.

Minoritized

Used in place of minority (noun) to highlight the social oppression that minoritizes individuals. Minoritized groups in any society are those defined as “minorities” by a dominant group that is numerically larger. This involves a power relationship between dominant and minoritized groups.

Oppression

Systemic devaluing, undermining, marginalizing, and disadvantaging of certain social identities in contrast to the advantaged norm, either intentionally or unintentionally.

Power

Access to resources that enhance one’s chances of getting what one needs in order to lead a safe, comfortable, and productive life

Glossary of Terms

Privilege

Unearned social power accorded by the formal and informal schools of society to all members of a dominant group.

Race

Race is a socially constructed concept that places individuals into categories based on appearances that are ascribed with cultural characteristics.

Socioeconomic Status

The social standing or class of an individual or group, often measured as a combination of education, income, and occupation.

Systemic Racism (Structural Racism)

A system in which public policies, school practices, cultural representations, and other social norms—while not practiced consciously—reinforce and perpetuate racial group inequity.

Underrepresented/Underserved

Underrepresented or underserved groups are those that are disproportionately lower in number in your school or organization, relative to their number in the general population. They also, historically or currently, have received less attention, resources, and status than others with more power and privilege, resulting in patterns of exclusion and unbalanced difficulty in obtaining social and economic prosperity or other social benefits, such as education.

White Privilege

Race-based advantages, school preferential treatment, and exemption from racial oppression.



Implementation

SECTION

4

- Operationalize Strategic Initiatives
- Establish an Ongoing Communication Process
- Share Out DEIJ Successes and Progress

Operationalize Strategic Initiatives

Assigning Project Owners for Goals and Sub-Goals

Schools are being asked to go further than ever to foster equity and dismantle systemic racism, but too few have the accountability systems in place to facilitate follow through and drive meaningful progress on their DEIJ plans. In addition to SMART goals, accountability measures like project owners and timelines are critical to moving from rhetoric to meaningful action. See the strategies and examples below to embed accountability measures into your DEIJ plan.

Assign Dual Project Owners at Cabinet and Unit Levels to Encourage Collaboration

No single person can (or should) hold sole responsibility for DEIJ strategy. Dismantling systemic racism demands coordination among multiple departments, so responsibility is necessarily diffuse. Without the right accountability systems in place, however, this can lead to a piecemeal approach to DEIJ efforts.

As a result, EAB recommends that schools should assign action items and objectives to “project owners” at both the cabinet- and unit-level. Naming a senior leader for each item helps ensure buy-in and signals that DEIJ work is a priority for the leadership team. At the same time, assigning objectives to unit-level owners also establishes frontline commitment and helps to translate broad strategy to the department and individual levels.

These “project owners” should include representatives across the entire school and not just one specific office or role. For example, the onus for DEIJ progress should not be placed solely on Director of Diversity & Inclusion. Systemic change requires action from many stakeholders, including enrollment management, residence life, athletics, to health services, academic affairs, and beyond. Finally, project owners must collaborate to ensure everyone is coordinated in both their understanding of the problem and their implementation of solutions.

School Examples of DEIJ Project Owners

► [Arcadia University](#)

- Arcadia assigns not just an office, but specific faculty, staff, and administrators to be accountable for each action item.

► [Lee’s Summit R-7 School District](#)

- Action steps are assigned to teams with executive and unit-level representation

► [American University](#)

- In phase two of its Plan for Inclusive Excellence, American University holds cabinet-level leadership accountable while also delegating responsibility to different unit-level owners.

► [University of Denver](#)

- University of Denver’s plan includes a list of sub-goal level collaborators to facilitate intra-school collaboration.

Continue to the next page for more

Operationalize Strategic Initiatives (cont.)

Establishing Deadlines to Drive Tangible Progress

Facilitate Follow-Through on Strategic Objectives With Concrete Timelines

Demands for change are growing in urgency. Today's students expect fast responses, but too often, schools get caught in a state of inertia.

As another measure of accountability, the leaders responsible for developing DEIJ plans must establish concrete deadlines and timelines for objectives. EAB's review of DEIJ plans revealed that most schools tend to focus on incremental quick wins, rather than bold, sustained action that addresses systemic issues over the long term. The best plans have a balanced mix of short-, mid-, and long-term timelines, to not overprioritize one set above another (e.g., focusing too much energy on short-term symptom relief without investing in structural change). That said, it is not enough to label an objective as "short"- or "long"-term. Leaders must define what that means by applying actual lengths of time to them.

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Education Examples of DEIJ Timelines

► [Menlo School](#)

- Menlo's School is in year two of their two-year Equity, Diversity and Inclusion strategic plan cycle with 33 strategies driving 5 overarching priority areas.

► [American University](#)

- AU breaks down its goals into immediate steps and long-term objectives that will be tackled each academic year

Taken together, these strategies create a shared understanding of who is responsible for each action item and the estimated time for completion. Ultimately, these accountability elements will help to ensure that DEIJ plans are conducive to making progress and building trust with school community members that have long waited for advancement on DEIJ issues.

Establish an Ongoing Communication Processes

Keeping the Community Involved in DEIJ Initiatives

Making progress on DEIJ is a continuous improvement process, and schools should therefore set the expectation upfront that there will be regular updates about the work in the plan. These updates will serve to keep the community informed and start to establish trust with groups that have been previously disappointed by school efforts.

Beyond semester or annual updates, it is also important to show where the school is in making progress on specific goals. Providing details and information on more granular action items gives the school community a sense of how the day-to-day work is progressing and can highlight any specific roadblocks. This allows for in-the-moment course correction and helps instill a culture of transparency around the work.

To make it easy to find these updates, EAB recommends schools create a central webpage or hub with their DEIJ plan, any updates, and key resources. This ensures that all relevant information is easily accessible. schools should provide quarterly updates on the progress on strategic goals and action items. These updates should be shared by the President. See below for additional guidance around key elements of DEIJ plan communication.



Share Out DEIJ Successes and Progress

Keeping the School and Local Communities Up to Date

Schools should publish comprehensive DEIJ plan updates to their central websites. Doing so increases transparency and allows schools to celebrate its successes while also laying out clear plans for the work yet to be done. Ultimately, keeping the community updated will build credibility and demonstrate that your school remains committed to the work.

University of Michigan's Annual Progress Reports



Source: University of Michigan, [DEIJ Strategic Plan Progress Reports](#), accessed May 2021; EAB interviews and analysis.